



ECHOVANTAGE RELEASE NOTES

VERSION 3.22 – HOTFIX 1

OVERVIEW

This hotfix release includes an update to the 835 import process to allow users to configure if Crossover Payers are marked as Billed (Charge Status = Outgoing) after the Remittance processing job is finalized and an 837I Improvement for Staff Taxonomy. The release also contains some Billing, Remittance, Unapplied Payments, and Reprocessing related bug fixes. Each of these is detailed below.

IMPROVEMENTS

Mark Crossover Payers Billed Option

When importing an 835 Remittance file, there is now a checkbox for *Mark Crossover Payers Billed*. This checkbox allows billing users to determine if the Waterfalled Charges, from a finalized Remittance job where Crossover Payments are indicated, have a Charge Status of *Active* or *Outgoing*.

When the *Mark Crossover Payers Billed* checkbox is selected,

- And an 835 is imported with Crossover Payments indicated
- The Waterfall creates the Charge for the next billable Payer with a Status of *Outgoing*

When the *Mark Crossover Payers Billed* checkbox is NOT selected,

- And an 835 is imported with Crossover Payments indicated
- The Waterfall creates the Charge for the next billable Payer with a Status of *Active*.
- Charges with an *Active* Status can be billed in a *Fiscal Overview > Unbilled Charges* job, allowing the agency to provide correct Payer-specific information such as billing modifiers

In place of 'Y' or 'N,' the *CrossOverIndicated* column in dbo.Remittances is now populated with the following.

- O - when the checkbox is selected AND a Crossover Payment was indicated for that Remittance in the 835 file.
- A – when the checkbox is NOT selected AND a Crossover Payment is indicated for the Remittance in the 835 file.
- N – anytime time a Crossover Payment is NOT indicated for a Remittance in the 835 file.



837I Provider Taxonomy Segment

A Provider Taxonomy Segment was added to the 837I. Now when *Report Staff Taxonomy (Loop 2310A, PRV)* is selected in the 837I configuration in *Configuration > Services/Payers > Payers > Billing Methods*, a PRV segment is included directly after the NM1*71 Attending Physician segment.

	<p>When the <i>Report Staff Taxonomy (Loop 2310, PRV)</i> checkbox is selected,</p> <ul style="list-style-type: none"> • PRV01 is always 'AT' • PRV03 is the Staff person Taxonomy from <i>Configuration > Staff/Users > Staff > Profile</i> • Example: <code>PRV*AT*PXC*101Y00000X</code>
--	--

BUG FIXES

Reprocessing or Reversing Charges and Unapplied Payments, EV-38

An issue was addressed where Unapplied Payments could get attached to a VOID Charge if the Charge associated with the Unapplied Payment was reprocessed or reversed in Claims Management. If the original Unapplied Payment was applied after reprocessing or reversing, it was attached to the now VOID Charge with no way to reverse it. The stuck Unapplied Payment resulted in overstated payment amounts when posting to GL.

Now when reprocessing or reversing a Charge with an Unapplied Payment, the Unapplied Payment is also reversed. The original Unapplied and the reversal Unapplied Payments are marked as VOID in the database – the same way Remittances reversals are handled. This method maintains the original transaction history while also correcting GL activity.

An example of a Charge with overpayment resulting in an Unapplied Payment is shown in the Claim Details image below.

A *Reverse Service Transactions* job for this Claim was created in the Claims Management menu; the Unapplied Payment was not processed. After finalizing the *Reverse Service Transactions* job in the Reprocessing History Tab, the Claim Details now display



Claim Details

Client, Billing (000079)

Birth Date: 03/24/1989
SSN: 590-12-1212
Phone: (603)447-8600
Address: 1600 Washington St, Conway, NH 03818
Counseling 90834 03/22/2021

Name	Policy Number	Priority	Notes
BCBSNH	BCP-123	1	
SELF		99	

Show Reprocessed Charges

BCBSNH

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
Total Balance:		\$ 0.00					

SELF

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
Total Balance:		\$ 0.00					

Billing History

BCBSNH 03/24/2021

If the *Show Reprocessed Charges* toggle is enabled, the reversing entries are visible.

Claim Details

BCBSNH

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
03/22/2021	\$ 200.00	CHARGE CREATED	03/24/2021		DONE	90834	F40.243
03/22/2021	\$ 10.00	COPAY ADJ					
03/24/2021	\$ 190.00	PAYER PAYMENT					
03/24/2021	-\$ 200.00	CHARGE CREATED			DONE	90834	
03/24/2021	-\$ 190.00	PAYER PAYMENT					
03/24/2021	-\$ 10.00	COPAY ADJ					
Total Balance:		\$ 0.00					

SELF

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
03/24/2021	-\$ 10.00	CHARGE CREATED			DONE	90834	
Balance:		-\$ 10.00					
03/22/2021	\$ 10.00	CHARGE CREATED			DONE	90834	
Balance:		\$ 10.00					
Total Balance:		\$ 0.00					

Billing History

BCBSNH 03/24/2021

Note that the Unapplied Payment is removed. There are now two void records in the dbo.UnappliedPayments table. The original Unapplied Payment (second row) and the reversal Unapplied Payment (first row).

UpdateUser	Flagged	Status	MarkedDone	Refund	RefundsUnappliedPayment	Void	ReversesUnappliedPayment
20190621061909906990C4E80A1DC4B0B86A	N	DONE	N	N	NULL	Y	20210324054352796E38B4870A4524250BA8
20190621061909906990C4E80A1DC4B0B86A	N	DONE	N	N	NULL	Y	NULL

Identifying and Fixing Unapplied Payments Linked to Void Charges

Affected Unapplied Payments can be one of two types: 1) never applied, the easiest to address, or 2) applied. The upgrade process automatically runs a script that identifies Unapplied Payments linked to Void Charges that have **never** been applied. The script then links the unapplied Unapplied Payment to the *Active* Charge. No action is required of the agency to run this script.

A temporary report, *Unapplied Claim Identification*, is available with this release to identify Claims with Unapplied Payments linked to Void Charges that **have** been applied **and** posted to GL. The report is designed to give quick access to the Claim Details for each returned record. Use the following steps to configure and launch the report:

1. Copy the agency's domain name, i.e., <https://www.myagency.echoehr.com> - make sure the trailing "/" is removed.
2. Open the Claim_Identification report located in the *Fiscal Reports* folder in the Reports menu.
3. Paste the domain name into the **Base EV URL** field, then select *View Report*.

Base EV URL ← →



The report lists the *Service Date*, *Charge Amount*, and *Client* of the affected Unapplied Payment. If the report is configured correctly before launching, the Service Date links to the Claim Details for that Service when selected. If multiple Remittances need reviewing, right-clicking on the Service Date and selecting “Open link in a new tab” is recommended; using the browser’s back button after viewing clears the *Base EV URL* field.

Service Date	Charge Amount	Client
2019-12-07	151.76	000052
2021-02-28	533.33	000075
2021-03-02	400.00	000078

The results returned on this report require careful review. Corrections must be handled on a Claim by Claim basis as the fixes vary based on the situation.

Reprocessing Remittances, EV-39

A Remittance issue was addressed where a Remittance could be associated with a VOID Charge if the Charge was Reprocessed in Claims Management before the Remittance was included in a processing job. Now when processing Remittances in *Vantage Point > Fiscal Overview > Unprocessed Remittances*, the application verifies that none of the Remittances are attached to a Reprocessed or Void Charge. If a Void Charge is found, the job throws the following error and places the Remittance on *HOLD*.

Errors	
Level	Message
ERROR	Remittance associated with reversed charge
ERROR	Remittance associated with reversed charge

Resolve the error(s) by editing the Remittances and matching them with the new *ACTIVE* Charge by following the steps below:

1. Reverse (or Finalize) the *Unprocessed Remittances > Process Transactions* job to return the on *HOLD* Remittance(s) to *READY* Status.
2. Navigate to the *Remittances* main menu option and select the Remittance(s) referenced in the job errors to edit the Remittance Details. Note that the Remittance has a Status of *Ready*, but no Charge is selected – like the image below.



000077 Bundling, ThisClient
Service Date: 02/08/2021 \$ 76.00 BUNDP VIEW CLAIM

Remittance Details

Transaction Type *	Transaction Date *	
PAYER PAYMENT	02/25/2021	
Remittance Amount *	Remittance Date	RA Number
\$ 76.00	02/25/2021	
PCCN	Batch ID	
	EV-39	
Allowed Amount	Patient Responsibility	<input checked="" type="checkbox"/> Waterfall to next payer

Client & Service

Payer *	Client	Service Date
BUNDP - Bundled Payer	000077 Bundling, ThisClie...	02/08/2021

Counseling 90841 03/24/2021
Staff H5123 Sherwood, Heather
Amount \$ 100.00 Balance \$ 100.00 ACTIVE VIEW CLAIM

0 Messages & Notes Status * Ready

+ SAVE AND ADD ANOTHER DELETE CANCEL SAVE



3. Change the Status to *Not Ready* and select the Active Charge.

Client & Service

Payer *	Client	Service Date
BUNDP - Bundled Payer	000077 Bundling, ThisClie...	02/08/2021

Counseling 90841 03/24/2021
Staff H5123 Sherwood, Heather
Amount \$ 100.00 Balance \$ 100.00 ACTIVE VIEW CLAIM

0 Messages & Notes Status * Not Ready

+ SAVE AND ADD ANOTHER DELETE CANCEL **SAVE**

4. Update the Status once more to *Ready* and select **SAVE**.

Client & Service

Payer *	Client	Service Date
BUNDP - Bundled Payer	000077 Bundling, ThisClie...	02/08/2021

Counseling 90841 03/24/2021
Staff H5123 Sherwood, Heather
Amount \$ 100.00 Balance \$ 24.00 ACTIVE VIEW CLAIM

0 Messages & Notes Status * Ready

+ SAVE AND ADD ANOTHER DELETE CANCEL SAVE

5. Return to *Fiscal Overview > Unprocessed Remittances > Process Transactions* and create another job with the edited Remittance(s). Once each is associated with an *Active Charge*, the Remittances can process without error.



Waterfalling Charges to Self-Pay, EV-41

An issue was addressed where an Unapplied Payment was created during the Waterfall process of a Patient Responsibility amount to Self Pay when a Self Pay charge for that Service, i.e., a Copay, already existed. The system also applied a Charge Increasing Credit in place of a Fee Adjustment to create the correct Self Pay balance. An example is shown below.

Claim Details ✕

ANDI, Taylor MYSELF (asdf0000)

Birth Date: 04/19/1971
SSN: 020-43-6798
Address: 16 Solitude Way, Solace, RI 28105

Alcohol and Drug Program 90837 03/01/2021 Show Reprocessed Charges

Name	Policy Number	Priority	Notes
ANTHBCBS	BCBS-MMA	25	
SELF		99	

ANTHBCBS NOTES & TASKS

Unapplied Payments

Date	Amount	Reason
03/01/2021	\$ 3.00	PAYER PAYMENT

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
03/01/2021	\$ 200.00	CHARGE CREATED	03/01/2021	OHYEAH-005 1 VISITS	DONE	90837	F10.14
03/01/2021	\$ 154.00	PAYER PAYMENT					
03/01/2021	\$ 3.00	COPAY ADJ					
03/01/2021	\$ 43.00	FEE ADJ					
Total Balance:	\$ 0.00						

SELF NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
03/01/2021	\$ 3.00	CHARGE CREATED			ACTIVE	90837 - J3	
03/01/2021	-\$ 40.00	CHARGE INCREASING CREDIT					
Balance:	\$ 43.00						
Total Balance:	\$ 43.00						

Applying the Unapplied Payment corrected the Payer Payment and the adjustment types used, but added unnecessary steps – applying the unapplied, processing a waterfall Self Pay Charge, and creating bills for Self Pay. The image below is after completing each of the extra steps.

Claim Details ✕

ANDI, Me MYSELF (asdf0000)

Birth Date: 04/19/1971
SSN: 020-43-6798
Address: 16 Solitude Way, Solace, RI 28105

Alcohol and Drug Program 90837 03/01/2021 Show Reprocessed Charges

Name	Policy Number	Priority	Notes
Test1	MAP-123	20	
BCBSNH	BCBS-MMA	25	
SELF		99	

BCBSNH NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
03/01/2021	\$ 200.00	CHARGE CREATED	03/01/2021		DONE	90837	F10.14
03/01/2021	\$ 154.00	PAYER PAYMENT					
03/01/2021	\$ 3.00	PAYER PAYMENT					
03/01/2021	\$ 3.00	COPAY ADJ					
03/01/2021	\$ 43.00	FEE ADJ					
03/24/2021	-\$ 3.00	COPAY ADJ					
Total Balance:	\$ 0.00						

SELF NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
03/01/2021	\$ 43.00	CHARGE CREATED	03/24/2021		OUTGOING	90837 - J3	
Balance:	\$ 43.00						
Total Balance:	\$ 43.00						

Billing History

BCBSNH 03/01/2021
SELF 03/01/2021
SELF 03/24/2021



Now when a Patient Responsibility Charge waterfalls to the Self Pay Payer, and there is an existing charge for that Service, an Unapplied Payment is no longer created. An example is below.

Claim Details

Client, Billing (000079)
 Birth Date: 03/24/1989
 SSN: 590-12-1212
 Phone: (603)447-8600
 Address: 1600 Washington St, Conway, NH 03818
 Counseling 90834 03/08/2021

Name	Policy Number	Priority	Notes
BCBSNH	BCP-123	1	
SELF		99	

Show Reprocessed Charges

BCBSNH

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
03/08/2021	\$ 200.00	CHARGE CREATED			DONE	90834	F40.243
03/08/2021	\$ 10.00	COPAY ADJ					
03/15/2021	\$ 98.00	PAYER PAYMENT					
03/15/2021	-\$ 10.00	COPAY ADJ					
03/15/2021	\$ 50.00	FEE ADJ					
03/15/2021	\$ 52.00	BALANCE ZEROING CREDIT					
Total Balance:	\$ 0.00						

SELF

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
03/08/2021	\$ 10.00	CHARGE CREATED	03/24/2021		OUTGOING	90834	
03/08/2021	-\$ 40.00	FEE ADJ					
Balance:	\$ 50.00						
Total Balance:	\$ 50.00						

Billing History

SELF 03/24/2021

BCBSNH – Payer 1

- The *PAYER PAYMENT* amount of \$98.00 matches the amount entered in Remittance Entry.
- The *-\$10.00 COPAY ADJ* balances out the initial Copay Charge.
- The *\$50.00 FEE ADJ* is the Patient Responsibility amount entered during Remittance Entry.
- The *\$52.00 BALANCE ZEROING CREDIT* adjusts Payer 1’s Balance to \$0.00.

SELF – Self Pay Payer

- The *\$10.00 CHARGE CREATED* amount is the initial Copay created during the initial charge creation for Payer 1.
- The *-\$40.00 FEE ADJ* amount adjusts the Self Pay Payer to the full Patient Responsibility amount indicated in the Payer 1 Remittance.

Contractual Adjustments, EV-149

An issue was addressed where Contractual Adjustments were marked as *Ready* even when not matched to a Charge. Now when importing Contractual Adjustments,

- If it matches an Active Charge, it is marked as *Ready*, the same as the corresponding Payer Payment.
- If it matches a Done Charge, it is marked as *Not Ready*, the same as the corresponding Payer Payment.
- If it does not match ANY Charge, it is also marked as *Not Ready*, the same as the corresponding Payer Payment.



Remittance Status, EV-152

An issue was addressed where the Status drop-down on the Remittance Details page was not correctly updated after the Remittance was finalized in a *Fiscal Overview > Unprocessed Remittances > Process Transactions* job. The Remittance home page did correctly display a Status of *DONE* in the Remittance row. Now when the Remittance Detail is viewed after it has been successfully finalized, the Status correctly displays *DONE*.

The screenshot shows the 'Client & Service' section of the Remittance Details page. It includes fields for Payer (BCBSNH - Blue Cross Blu...), Client (000079 Client_Billing), and Service Date (03/08/2021). Below this, a row of service details is shown: Counseling 90834 on 03/08/2021, performed by Staff H5123 Sherwood, Heather, with an amount of \$ 200.00 and a balance of \$ 0.00. The status is 'DONE' in a green circle. A 'VIEW CLAIM' button is visible. At the bottom, a 'Status' dropdown menu is shown, with a red arrow pointing to it, and the selected value is 'Done'.

Progress Note Time Issue, EV-169

An issue with the time displayed for a Progress Note signature was reported after the change to daylight savings time - the time displayed an hour later than the actual signature time. The issue was addressed by first determining the timezone of the UTC Datetime record in the database and then calculating the offset to display the time correctly. For example, a Progress Note signed at 9:00a before the change to Daylight Savings time now also displays the correct 9:00a time when viewed after the change to Daylight Savings time.

Previously, the timezone offset was figured based on the current date, and then the database UTC datetime was adjusted by that offset. Using the same example above, when viewing the Progress Note after the change to Daylight Savings Time, the signature time displayed as 10:00a – a UTC offset of 4 was used for EDT (current time zone) instead of the UTC offset of 5 for EST (timezone of signature record).

GL Posting with Unapplied Payments, EV-170

An issue was addressed where the GL Debit/Credit Account columns in the UnappliedPayments table were changed from *NULL* (able to include in a future job) to an empty string (not able to include in a future job). The empty string occurred if the default Unapplied Segment mappings were not defined in *Configuration > Setup > GL Mapping* AND the job containing the Unapplied Payment(s) was finalized without first correcting the mapping. The processing errors correctly indicated a GL Mapping could not be found.

The upgrade process automatically runs a script that fixes this issue, requiring no further action from the agency. The empty string is updated to *NULL* in the GL Debit/Credit Account columns for any UnappliedPayment records in this state. **Note that these transactions are picked up the next time a Post to GL job is run.**

UPDATES

Ticket #	Description
EV-157	The ability to prevent the waterfall charge for crossover Payers from being automatically marked as "Outgoing" was added.
EV-199	Updated the Recent Remittances list on the right side of the <i>New Remittance</i> and the <i>Remittance Details</i> screen to update when a new Remittance is entered, or an existing Remittance is updated.

BUG FIXES

Ticket #	Case #	Description
EV-38		When a charge with an associated Unapplied Payment is reversed, the Unapplied Payment is now also reversed.
EV-39		Remittance processing jobs now throw an error if a Remittance is attached to a Void charge.
EV-41		Unapplied Payments are no longer created in error when waterfalling to Self Pay with an existing charge, i.e., Copay.



EV-149		Contractual adjustments are no longer marked <i>Ready</i> when matched to a <i>DONE</i> Charge or not matched to any Charge.
EV-152		Fixed an issue where the Remittance Status did not update appropriately after finalizing the processing job.
EV-169	78229	Progress Note Time Issue
EV-170		GL Posting with Unapplied Payments