



# ECHOVANTAGE RELEASE NOTES

VERSION 3.23

## IMPROVEMENTS

### Exclude Subsequent Payers on 837 Configuration

There is now an option to exclude subsequent Payers on a Payer's 837 configuration in *Configuration > Services/Payers > Payers > Billing Methods*. The *Exclude subsequent payers* checkbox is found in the Claims and Services section, underneath *Adjudication Level*. This box is unchecked by default.



### 270/271 MCO Information

A new MCO column was added to the *Eligibility > Requests* tab to display the name of a Client's Managed Care Organization when provided in the import. The *NM103* segment of the 271 import file contains this information when the *NM1\*Y2* segment is also present. A new column, *MCO*, was added to the *dbo.ClientEligibilities* to store this information in the database. The MCO column displays the name of the MCO when included in the file or *Not provided*.

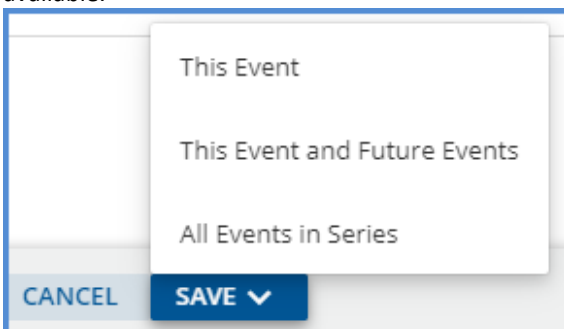
Most Recent Eligibility Requests

Client	Request Date	Payer	MCO	Status	Rejection Reason
AA0000 Aarlyne, Ashley	11/25/2020	NHMDCD - NH Medicaid	NH Healthy Fa...	Accepted	
BEAS0000 Beach, Sandy	11/25/2020	BCBSNH - Anthem BCBS of NH	Not provided	Pending	
BEAS0000 Beach, Sandy	11/25/2020	AETNA - AETNA	Not provided	Pending	
BEAS0000 Beach, Sandy	11/25/2020	NHMDCD - NH Medicaid	Well Sense He...	Accepted	

### Additional Recurring Events Options

Recurring Events on the Scheduler received their final round of improvements. Users are now able to:

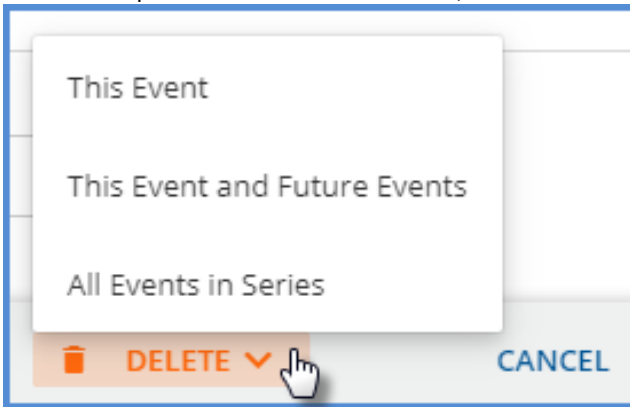
- Update multiple Events in the series – now, when *SAVE* is selected after editing an Event, the following options are available.



- **This Event** – Saves changes to the currently edited Event only.
- **This Event and Future Events** – Saves changes to the currently edited and all Future Events.
- **All Events in Series** – Saves changes to all Events, past, current, future.



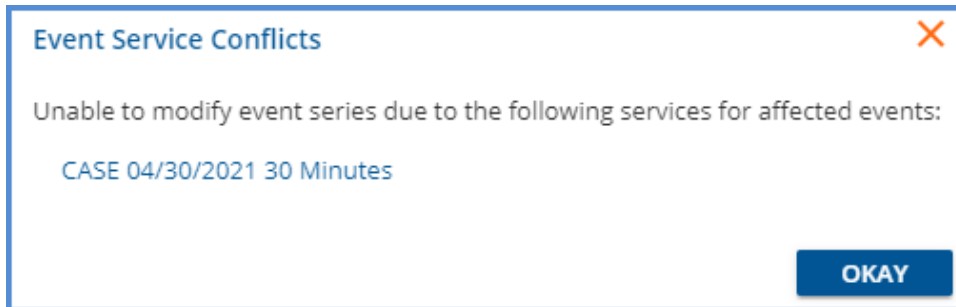
- Delete multiple Events in the series – now, when *DELETE* is selected, the following options are available.



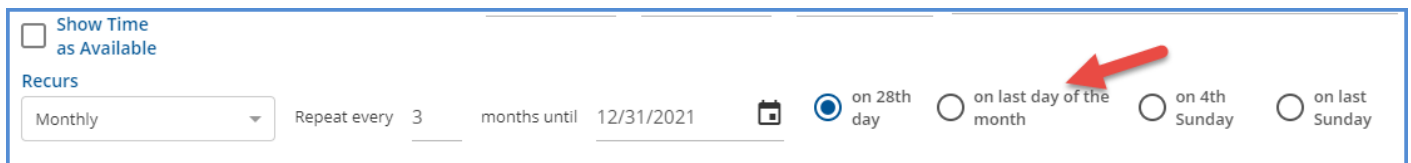
- **This Event** – Deletes the currently selected Event only.
- **This Event and Future Events** – Deletes the current Event and all Future Events.
- **All Events in Series** – Deletes all Events, past, current, future.

**Users are not able to update or delete Events that have Services created.**

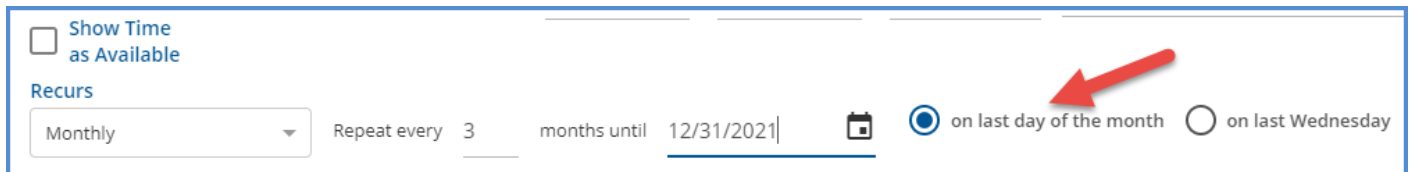
- If a Service has been created from an Event in the series range to be modified, no Events are updated or deleted.
- Instead, an *Event Service Conflicts* screen displays with a list of the conflicting Services.
- The Services on the list are clickable and link directly to that Service on the Scheduler.
- The list of conflicting Services does not contain Client names.



When creating a Monthly recurring event, entered on the last day of the month, there is now an "on last day of the month" option.



- Selecting this option creates the Event series on the last day of each month (28<sup>th</sup>, 30<sup>th</sup>, or 31<sup>st</sup>) through the *until* date.








- If the Event is created on the 31<sup>st</sup> of the month, there is no "on 31<sup>st</sup> day" option.

**Bug Fix**

An issue was addressed where creating a Recurring Event for every 2 or more weeks did not create the initial event on the correct day. Now when creating Recurring Events, the first Event is created on the day the Event series is entered and the remaining



Events are scheduled out from that date based on the number of weeks and until date specified. The message text displayed after Event creation was also updated to provide more clarity.

Before Fix Applied	After Fix Applied
<p><b>Date *</b> 04/15/2021   <input type="checkbox"/> All Day</p> <p><input type="checkbox"/> Show Time as Available</p> <p>Recurs every 2 weeks on , and Thursday from 04/08/2021 to 05/31/2021</p>	<p><b>Date *</b> 04/08/2021   <input type="checkbox"/> All Day</p> <p><input type="checkbox"/> Show Time as Available </p> <p>Recurs every 2 weeks on Thursday from 04/08/2021 to 05/31/2021</p>


### Duplicate Client Checking


Now when checking for duplicate Clients, an exact Social Security Number (SSN) match is returned as a potential duplicate result. Matching Clients that are marked as Confidential are also returned in the results list. An example with both types of matching is shown below.

Client ✕

Possible duplicate clients found

#### Select Existing Client

 FINCH01 Confidential Client  
Birth Date: 03/31/1981  
[SELECT CLIENT](#)

 BARN01 Barnhill, Kelsy Ann  
Birth Date: 06/30/1984    SSN: 123-41-5412  
[SELECT CLIENT](#)

#### Create New Client

<b>First Name</b> Tulsi	<b>Last Name</b> Niyar	<b>Birth Date</b> 03/31/1981
<b>SSN</b> 123-41-5412		

[CANCEL](#) [SAVE](#)



### Improved Loading Speed of Create Charges History Screen

Updates were made to the queries used to display information on the *Fiscal Overview > Unprocessed Services > History* tab to improve performance. The information now consistently displays less than 5 seconds after refreshing, even with large amounts of History data (29+ pages). Previously, a refresh on a History tab with 29 pages of data took approximately 90 seconds.

### Job Sort Order on History Tabs

The job sort order on the *History* tabs for some Fiscal Overview functions and Claims Reprocessing was updated to display jobs with an unfinalized Status at the top of the list. The updated screens include:

- *Fiscal Overview > Unprocessed Services > History*
- *Fiscal Overview > Unbilled Charges > History*
- *Fiscal Overview > Unprocessed Remittances > History*
- *Claims > Reprocessing History*

The jobs are now sorted by:

- *Pending, In Progress, Failed, and Preview* Status first
  - These have a secondary sort by Date from most recent to oldest.
- Followed by jobs with a *Done* or *Reversed* status
  - These also have a secondary sort by Date from most recent to oldest.

Date	Payers	Status	Created By	Message	Charges	Errors	
08/25/2020	WIPAY - WI Bundling Pa...	Preview	heather.sherw...	bundle 2, and location 11	\$ 700.00	0	Report 837P Debug FINALIZE
08/25/2020	WIPAY - WI Bundling Pa...	Preview	heather.sherw...	Loc 117	\$ 700.00	0	Report 837P Debug FINALIZE
03/27/2019	CC01 - Carroll County	In Progress	kathy.bunker	stable testing	\$ 3,109.97	3	
03/24/2021	2	Done	heather.sherw...	Billing Client, 1 & 2	\$ 1,650.00	0	Report 837P Debug

### 835 Import with Denials No Longer Creates CO Remittances

An update was made to the 835-import process to include Denial's CAS adjustment reason in a Message that is viewable on the Denial Remittance when the *Import Contractual Adjustments* checkbox is selected. An additional Contractual Adjustment Remittance is **NOT** created for the denied Claim, even though the Denial's CAS adjustment reason is often sent with the same identifier (CO) as a Contractual Adjustment. This change allows the agency to work the Denials, possibly fixing the issue and resubmitting the Claim for payment. If the Contractual Adjustment amounts were included and processed, the Charge would be written off.

### Adjustment Messages Code Displayed

Updates were made to how Adjustment Messages are displayed when *Messages & Notes* are viewed in the Remittances Details screen. Now there is a separate column for the *Code*, and the *Message* column is wider, allowing the whole message text to display.

ADJUSTMENT MESSAGES			NOTES
Code	Amount	Message	
2	\$ 15.00	Coinsurance Amount	
45	\$ 20.00	Charges exceed your contracted/legislated fee arrangement.	



## State Acorns

The following Acorns were updated:

- NC MST Custom Billing, 1.0.42.RELEASE
- RI BHOLD State Reporting, 1.0.83.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:**

#### Client Reports

*Medical Face Sheet* – Updated to pull the *Date* in the Vital Signs sections from the *VitalDate* column in the VitalSigns table. Previously the report used the record's CreateDate.

#### Fiscal Reports

*Remittance Report* – Updated to display the Service Date in *Charge/Date/BillCode* column.

*\_Remittance Report for Export* - The CSV-friendly report available within the main report above.

*Services List* – A Staff column was added to this report.

*Service Detail by Defined Filter* – Updated to display Services within the specified date range.

*\_Service Detail by Defined Filter* - The CSV-friendly report available within the main report above.

*Service Detail With Charges* - Updated to display Services even when no selection is made in the Program filter.

*\_Service Detail With Charges* - The CSV-friendly report available within the main report above.

*Service Detail With Charges by Client* – Updated to display Services even when no selection is made in the Program filter.

*\_Service Detail With Charges by Client* - The CSV-friendly report available within the main report above.

*Service Detail With Charges By Staff* – Updated to display Services even when no selection is made in the Program filter.

*\_Service Detail With Charges By Staff for Export* – The CSV-friendly report available within the main report above.

 The following reports will be removed with the release of EchoVantage v3.24.

- Waterfall Hotfix Troubleshooting, released with v3.21-Hotfix1
- Claim Identification, released with v3.22
- Unapplied Claim Identification, released with v3.22-Hotfix1

## UPDATES

Ticket #	Description
FW-11591	Updates were made to Remittance Entry that prevents a <i>Non Specific Payer Payment</i> from being saved against a specific Charge. Previously if a Transaction Type of <i>Payer Payment</i> was entered against a Charge and then the Transaction Type was changed to <i>Non Specific Payer Payment</i> , the Service Date and Charge id were still saved with the payment in the database.
FW-11805	The number of rows allowed in <i>Configuration &gt; Services/Payers &gt; Sliding Fees</i> was increased to 2000.
EV-225	Updates were made to the Single Sign-On feature in EchoVantage, using Okta, to now allow user access to EchoVantage without also requiring an Active Directory user.



EV-282	The Service Detail With Charges By Staff report was update to display Services even when no selection is made in the Program filter.
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**BUG FIXES**

Ticket #	Case #	Description
EV-72		The <i>Fiscal Overview &gt; Unbilled Charges &gt; Create</i> and <i>History</i> pages now correctly display 50 Service or Billing job records per page. Previously the query returned wildly varying record counts.
EV-108		<p>An issue was addressed where the Create Charges Error messages were not always resolved even when the jobs were Finalized, and the Charges had a Status = Done. Now, Errors are resolved when</p> <ul style="list-style-type: none"> <li>• A Charge is successfully created in the Service Processing (Create Charges) job – including Waterfall jobs</li> <li>• When a Service is marked DONE</li> <li>• At the beginning of a Reprocessing Job</li> </ul>
EV-109		<p>Addressed an issue where Contractual Adjustments were created with inverted amounts. Now with these changes,</p> <ul style="list-style-type: none"> <li>• The Contractual Adjustment is the difference between the Base and Contracted Rates.</li> <li>• If a Contracted Rate is \$0.00, the Contractual Adjustment is equal to the Charge balance.</li> <li>• If a Contracted Rate is the same as the Base Rate, there is no Contractual Adjustment.</li> </ul> <p><i>Known Issues:</i></p> <p>If the Copay amount is greater than the Charge (Contracted Rate) or Charge Balance, the Primary Payer is left in Active Status with a negative balance. This can be corrected by zero paying that Payer and entering the correct Patient Responsibility amount for that Charge. The Charge correctly waterfalls to Self Pay with the right amount, and the Primary Payer has a zero balance and a Charge Status of <i>DONE</i>.</p>
EV-246		An issue was fixed where a User could not add a Note to a Remittance if one did not already exist. Now Users are always able to add a Note on a Remittance.
EV-279	78456	The date in the Vital Signs section was updated to use the VitalDate from the Vital Signs record.
FW-12062		<p>An issue was addressed where Contractual Adjustments were marked as <i>Ready</i> even when not matched to a Charge. Now when importing Contractual Adjustments,</p> <ul style="list-style-type: none"> <li>• If it matches an Active Charge, it is marked as <i>Ready</i>, the same as the corresponding Payer Payment.</li> <li>• If it matches a Done Charge, it is marked as <i>Not Ready</i>, the same as the corresponding Payer Payment.</li> <li>• If it does not match ANY Charge, it is also marked as <i>Not Ready</i>, the same as the corresponding Payer Payment.</li> </ul>
FW-12087	ADAMS	CMS1500 bill print issue was resolved by Rebilling Outgoing Charges in the Claim screen to return the Charges to Active Status. Rebilled Charges in <i>Fiscal Overview &gt; Unbilled Charges</i> . CMS1500 printed as expected with up to 6 Client Services per page.
FW-12128		Fixed a bug where the Staff Credentials were not displayed in the correct signature Priority order as defined in <i>Configuration &gt; Staff/Users &gt; Staff &gt; Credentials</i> . Now Staff Credentials appear in priority order, and if two credentials have the same priority, they are displayed in alphabetical order. The display is limited to three credentials.
FW-12156		Fixed a display issue where the Client Search displayed confidential Clients as <i>Client, Confidential</i> . The Client Search results now return <i>Confidential Client</i> , the same behavior as the Clinical Home Client Search.