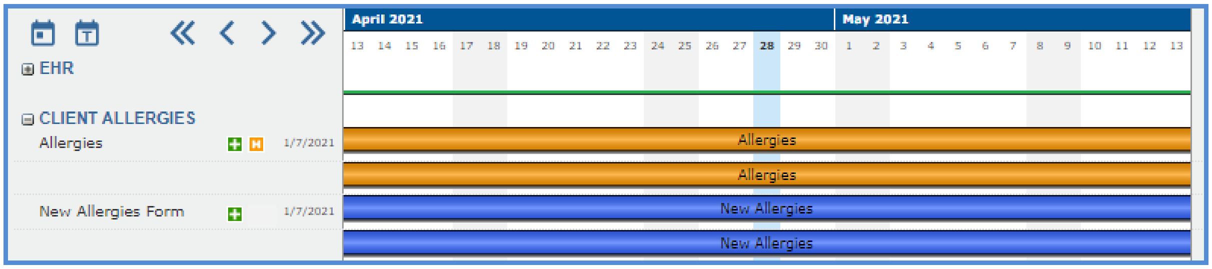
ECHOVANTAGE RELEASE NOTES

VERSION 3.24

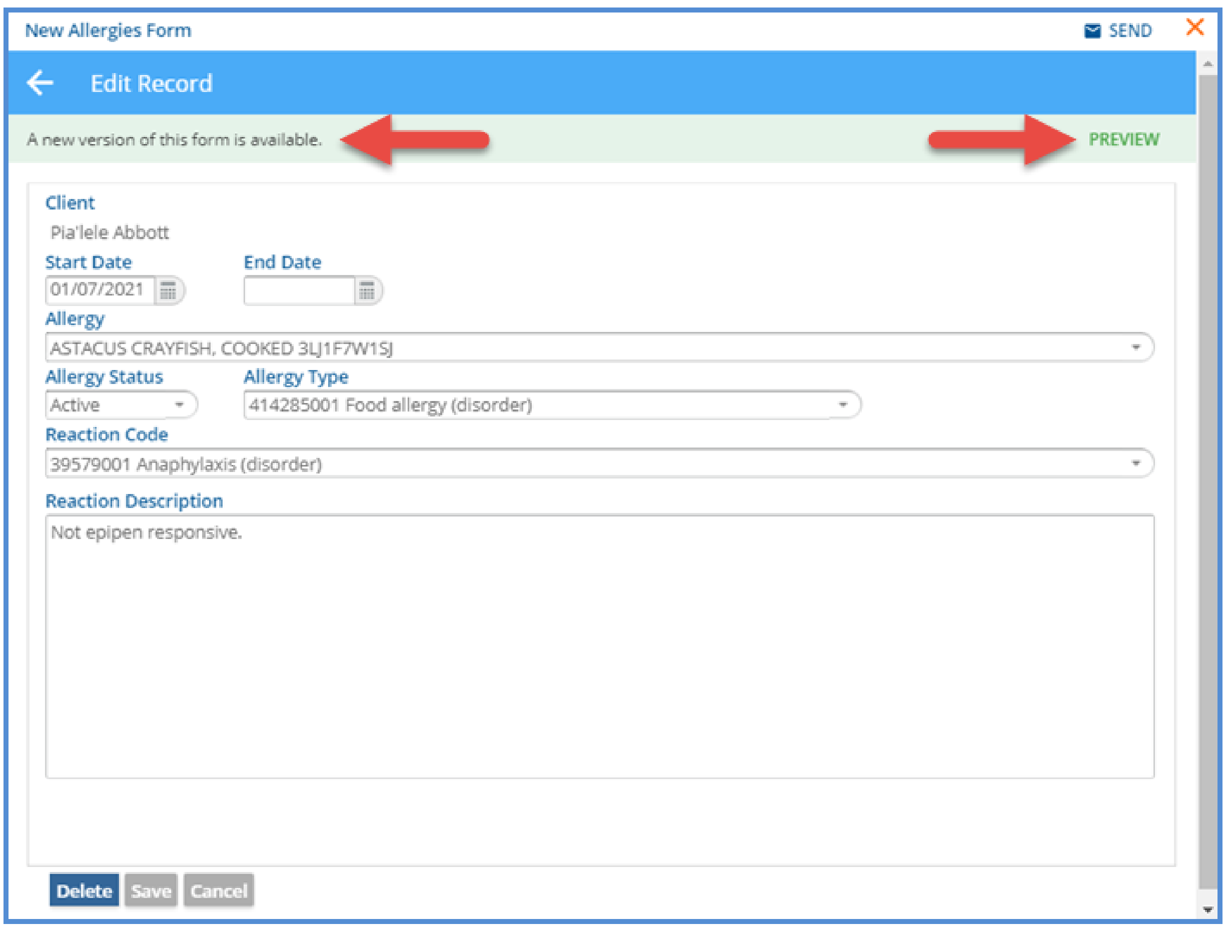
NEW FEATURES

New Allergies Form

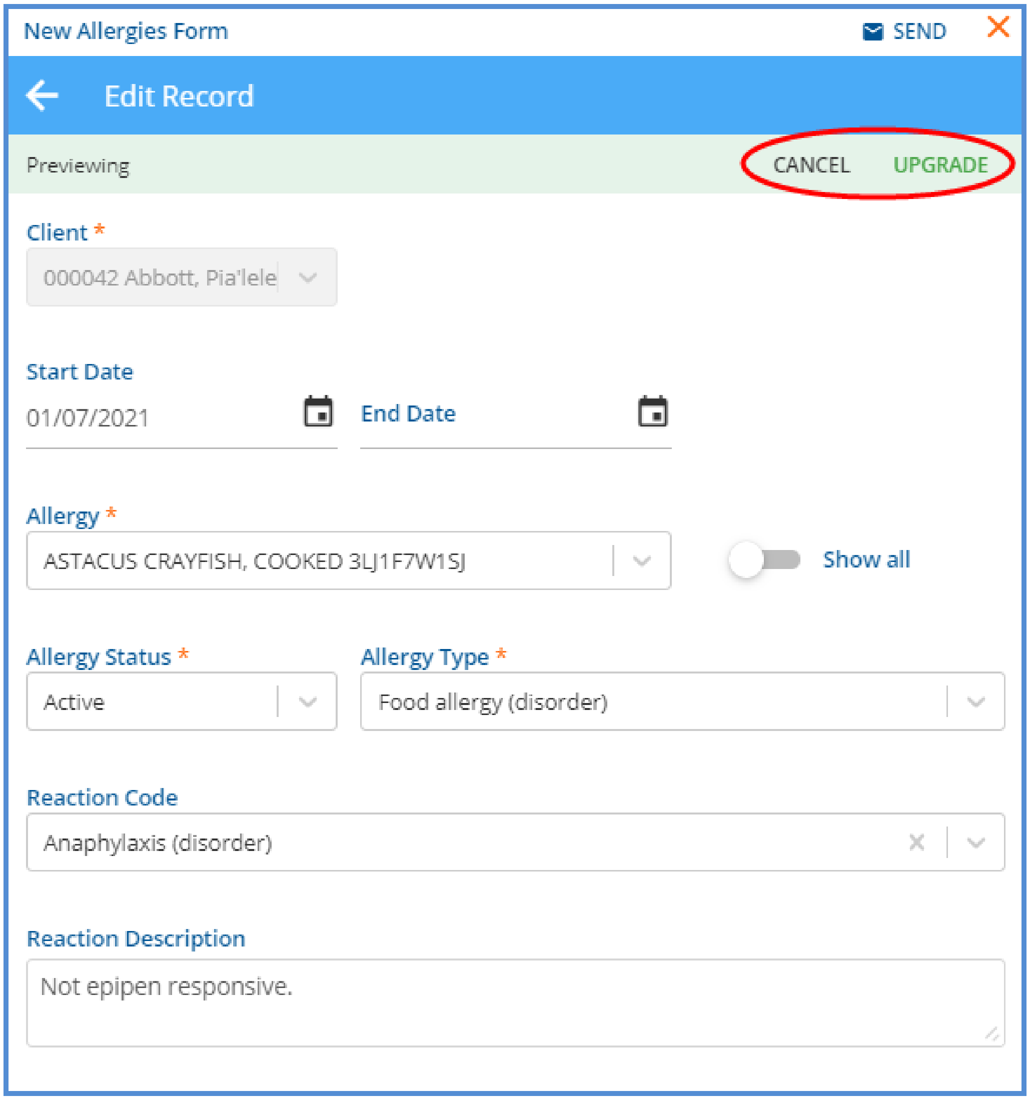
The new Client Allergies form using the next generation form renderer, FDNext, is introduced in this release. The upgrade installs the needed FDNext tables and the new *Client Allergies* form. To use the new form, add a Category and define the Depiction(s) in *Configuration > Client Chart > VHR Timeline*. Note that the Form name for the new form in the dropdown listing is *Client Allergies;* the old Form name is simply *Allergies.* Also, note that a History Form configuration is not required. Remember to right-click the Category Header and grant User Group permissions for the newly added form. The new form points to the same table, dbo.ClientAllergies; allergy records display twice if a user has access to both the new and old form.



Depictions for both forms are not required. If an existing record is opened using the new form, the old form displays a message indicating a new version of the form is available with a *PREVIEW* button. Note that *NEW* is not an available action.

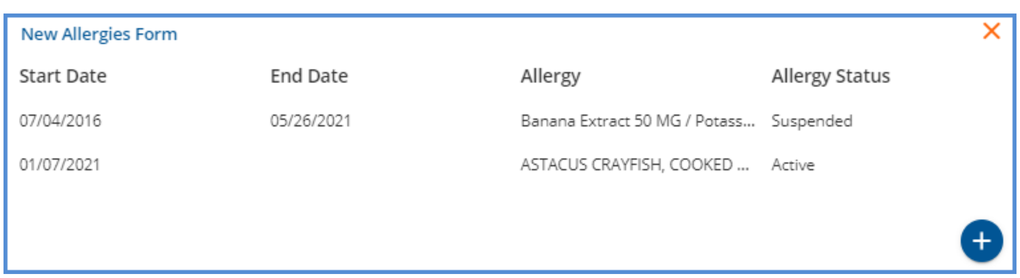


Select *PREVIEW* to display the same allergy record information in the new form.



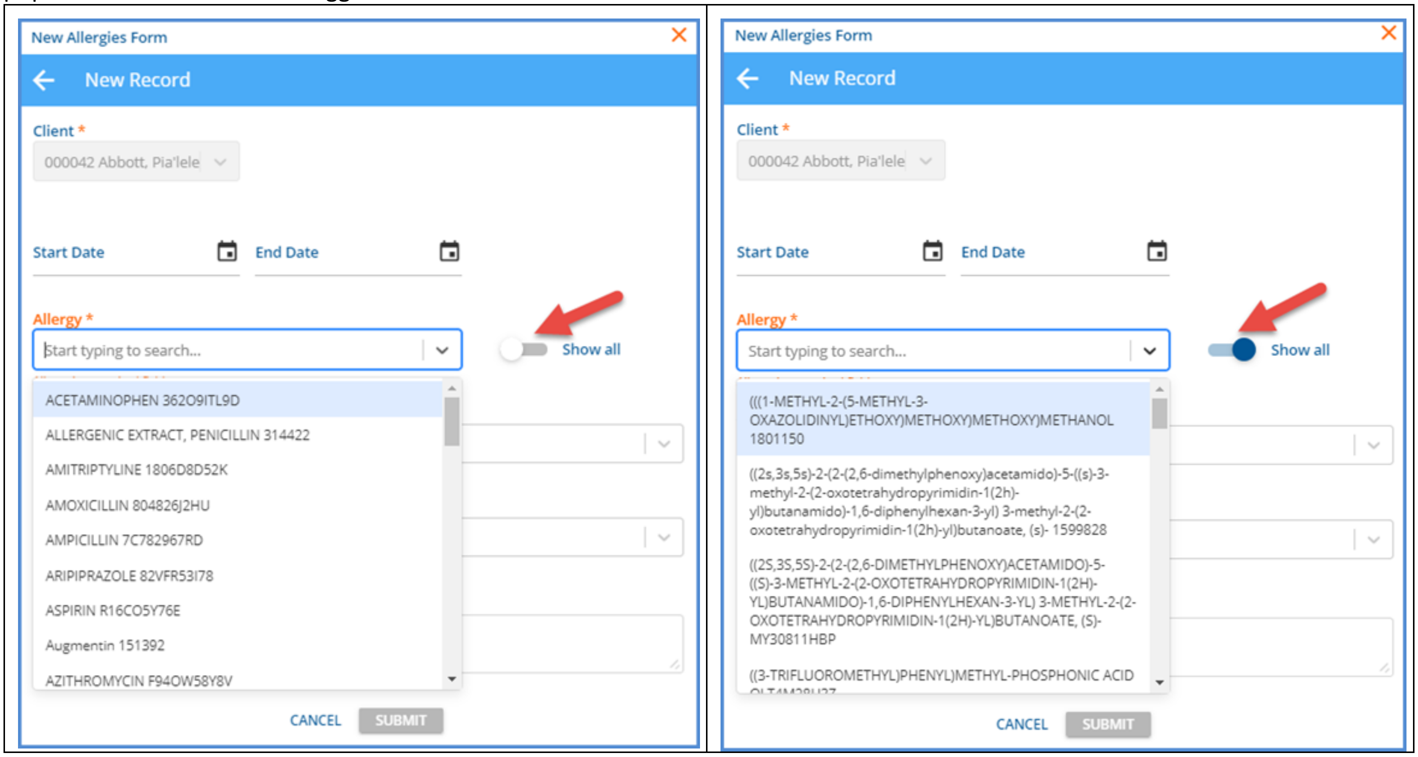
Select *UPGRADE* to begin the form conversion or select *CANCEL* to return without making changes.

After the toast appears confirming the upgrade was successful, click the left arrow next to Edit Record to reach the New Allergies Form records listing for the current Client. This list is an integrated allergy history.

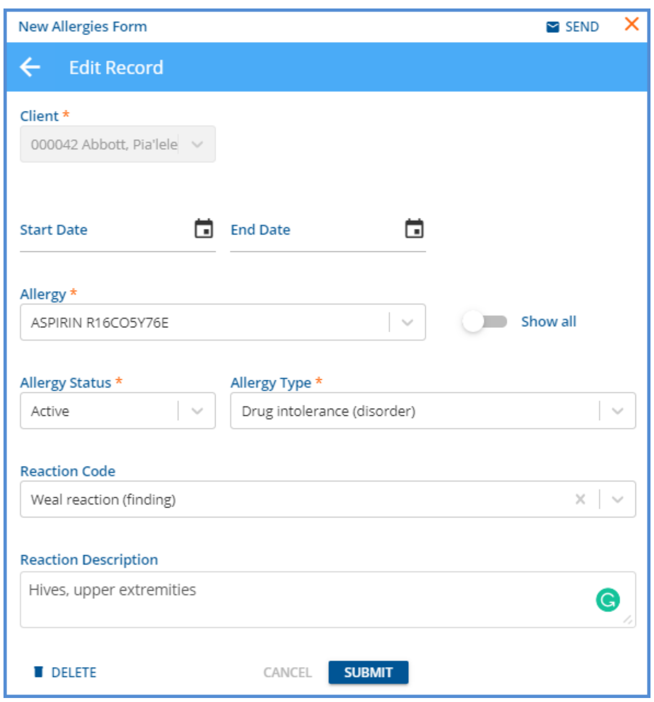


- Click on any row to view and edit an existing record.
- Click on the blue plus "+" to add a new allergy record.

When adding the first Allergy for a Client, the green plus "+" on the timeline must be used to open a blank form. Adding and editing the New Allergies Form is very similar to the original form with two exceptions, the speed with which the dropdown list populates and the *Show all* toggle.



The *Show all* toggle defaults to disabled. When disabled, the values in the *Allergy* dropdown listing are populated with the codes in the **dbo.vFavoriteAllergies** view. This view is prepopulated with 99 of the most commonly used allergy codes. An agency may customize this list of favorites by altering the view. To create a record for an allergy not in the favorite allergies view, enable the *Show all* toggle. Once enabled, the Allergy dropdown values are populated with the 200k+ codes from the view, dbo.vAllergyCodeDropdown. When the entry is complete, click the blue *SUBMIT* button.



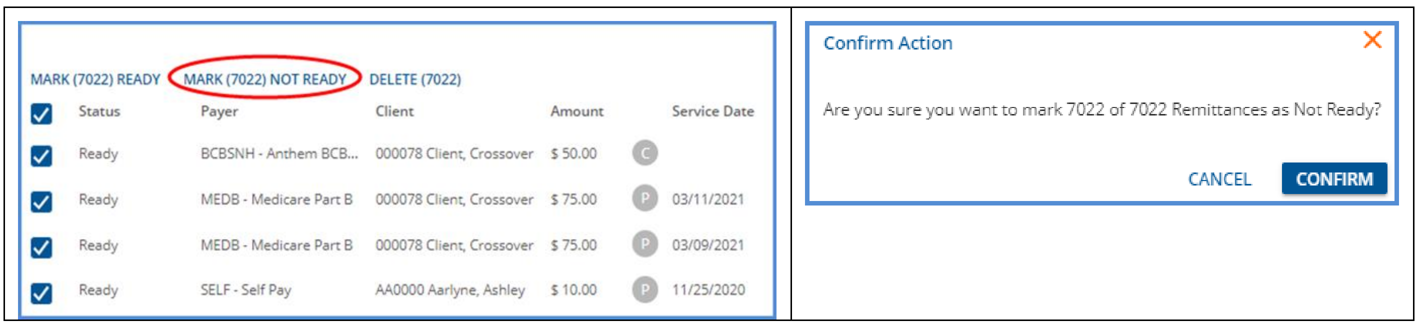
Note that the blue header changes from *New Record* to *Edit Record,* and the *DELETE* button displays and is enabled.

Additional Form Information

- The New Allergy Form maintains the same functionality as the existing form for DrFirst.
- An FDNext property field was added to Form DesignEHR in version 6.0.30 that allows Form DesignEHR forms to link to the new Client Allergies form.
- Click *HERE* for the Form DesignEHR v6.0.30 Release Notes.
- By default, the new Client Allergies form is not signable.
- If signatures are required on your allergy form, the *Signable* column in the fdn.Forms tables must be set to 'Y' for the Client Allergies form. ***Please note that form unlocking is not supported on the new Client Allergies form in this release.***
- The FD Next tables use a new schema, fdn; these tables are**:**
    - fdn.SchemaVersion
    - fdn.Forms
    - fdn.FormDefinitions
    - fdn.FormDefinitionRecords

Remittances Bulk Not Ready

A bulk *MARK NOT READY* action is now available on the Remittances screen. When *Ready* Services are selected, and the *MARK () NOT READY* action is clicked, the Remittance status for the selected Services is set to *Not Ready.* Like other bulk actions, a count of the number of items selected is displayed in parentheses, and a Confirmation Action pop-up displays.



Highest Rate for Staff Credential

When Creating Charges, any time a Staff has multiple credentials and the Service Definition or Payer Override rate has multiple credential rates; the highest contracted rate is now always selected.

New Form DesignEHR Release

A new version of Form DesignEHR, 6.0.30. is available with the release of EchoVantage v3.24. The changes address updates necessary for the New Client Allergies form. Click *HERE* for Detailed Form DesignEHR release notes.

IMPROVEMENTS

View Overpayment Detail Without Finalizing Remittances

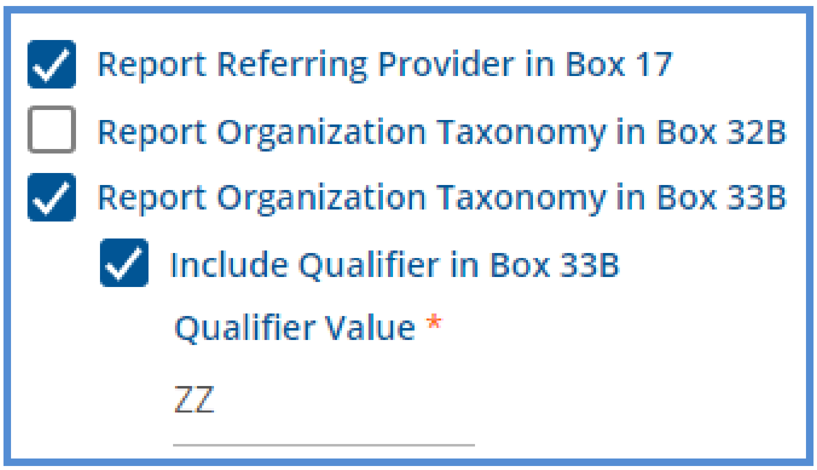
Users can now see which Charges will create an Overpayment before a Remittances job is finalized. In *Fiscal Overview > Remittances > Process Transactions > History,* selecting the job row before finalizing now includes an *Unapplied Column* in the list of job items. This column displays the dollar amount of the Unapplied Payment and can be $0.00 in the case of an Other type of Unapplied Payment. If the job does not create any Unapplied Payments, nothing is displayed in the column.

Charges

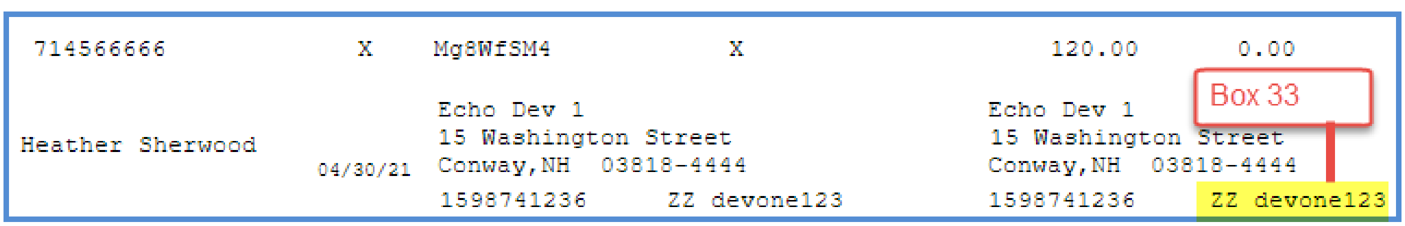
Service Date	Client	Payer	Procedure Code	Units	Charge	Adjustments	Payments	Unapplied
04/27/2021	000011 Beach, Sandy	MDCR	AA	1	$ 75.00		$ 75.00	
04/27/2021	000011 Beach, Sandy	MDCR	99201	1	$ 100.00		$ 50.00	$ 50.00
04/26/2021	000011 Beach, Sandy	MDCR	AA	1	$ 75.00		$ 50.00	
04/25/2021	000011 Beach, Sandy	MDCR	AA	1	$ 75.00		$ 50.00	

Qualifier Added to CMS 1500 Box 33

In *Configuration > Services/Payers > Payers > Billing Methods > CMS 1500,* there is now an option to include a qualifier for Box 33 and a space to specify the 2-character qualifier, i.e., ZZ.

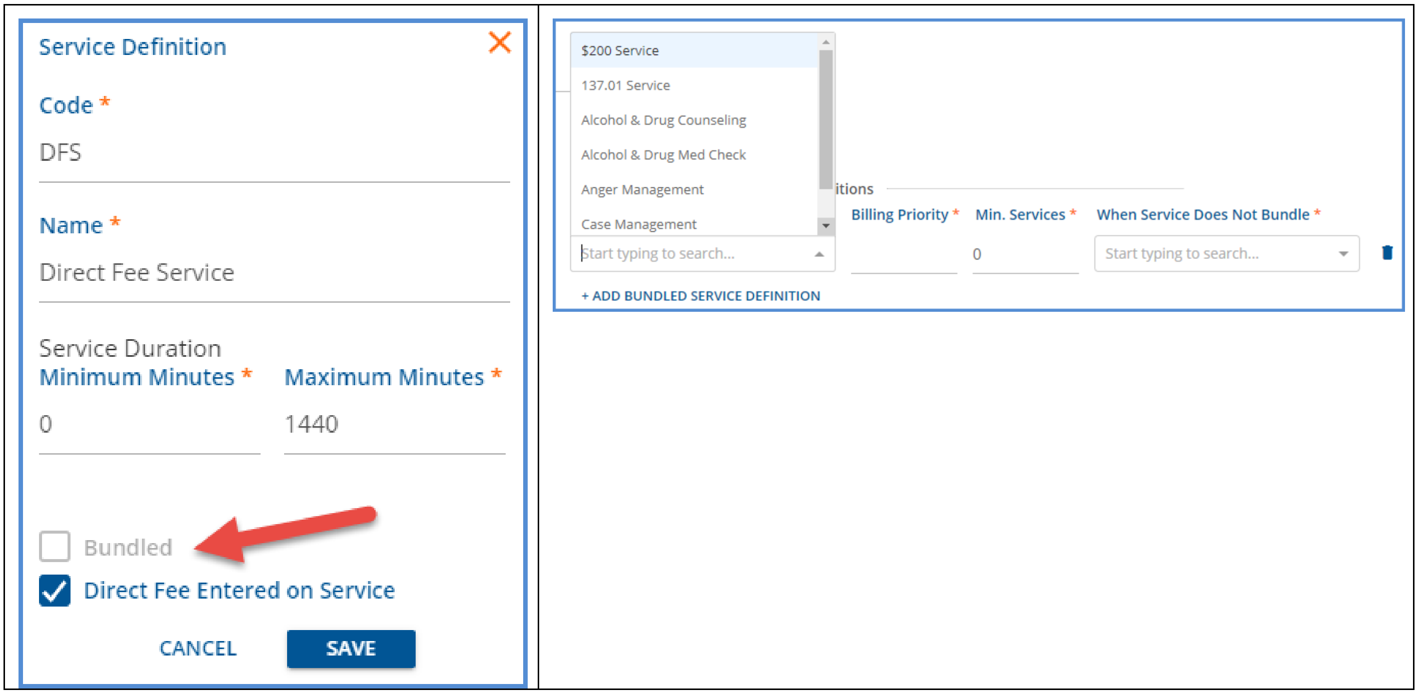


When a qualifier is indicated, it displays on the CMS 1500 report before the taxonomy. The qualifier and the taxonomy are separated by a space as shown below.



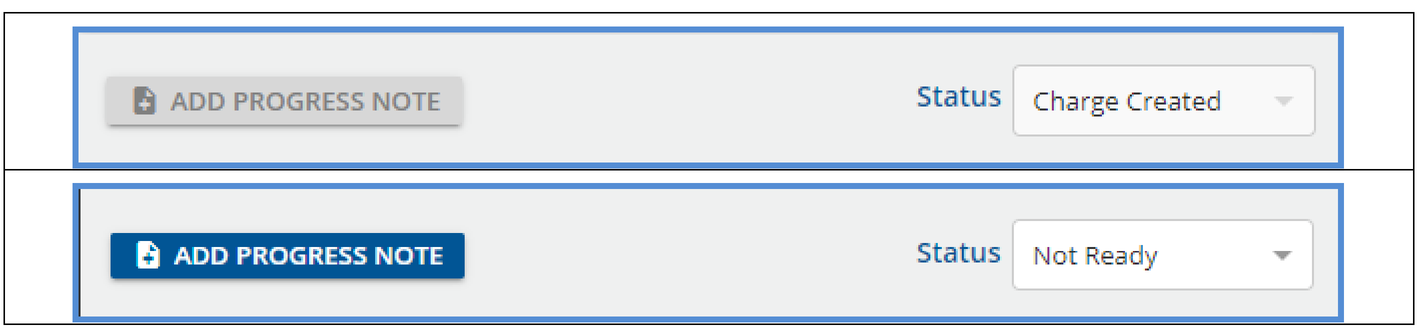
Direct Fee Service Definitions and Bundles

Changes were made in *Configuration > Services/Payers > Service Definitions* to prevent the creation of a Bundled Direct Fee Service Definition and to prevent Direct Fee Services from being included in a bundle. Now when a new Service Definition is created, the ability to select *Bundled* is immediately disabled when the checkbox for *Direct Fee Entered on Service* is selected. When adding a Service Definition to a bundle, Direct Fee Services are excluded from the Service Definition dropdown listing.



Progress Note Button on Services Screen

The Progress Note button on the Services screen is now disabled when there is no Progress Note, and the Service status is anything other than *Not Ready.* This change prevents adding an addendum to a note without first reprocessing the Service if Charges were created and finalized. Since Services should not be changed after they are billed, reprocessing preserves the auditability of the change.



Create Bills Date Column

In *Fiscal Overview > Unbilled Charges > Create* tab, the Service Date is now displayed in the newly titled *Service Date* column. Previously this was the *Date* column and displayed the transaction date of the Charge, which did not match the Service Date filter range when the Charge was reprocessed or waterfalled.

☐	Payer	Service Date	Status	Client	Staff	Service Code	Charge Am...	Procedure ...
☐	BCBS1 - Blue ...	04/27/2021	Active	000011 Beach...	HS1 Sherwoo...	ADM	$ 100.00	99201
☐	BCBS1 - Blue ...	04/26/2021	Active	000011 Beach...	HS1 Sherwoo...	ADC	$ 75.00	AA
☐	BCBS1 - Blue ...	04/25/2021	Active	000011 Beach...	HS1 Sherwoo...	ADC	$ 75.00	AA

BUG FIXES

Waterfall Leaves Service in Batch Status, EV-201

An issue was addressed where a Service was left in Batched Status when the associated Charge had a Status of DONE. The cause was found to be when the Paid By Other amount was greater than or equal to the subsequent Payer's Charge. Now if this occurs, the Waterfall job triggers a *"Payer skipped due to negative or zero balance"* warning and the Payer is skipped. If there are any Active Charges, Self Pay for example, the Service Status is *Charge Created.* If there are no Active Charges, then the Service Status is set to *Done.*

000006 Sagyidev, Borat — Payer Balance: $ 0.00 Client Balance: $ 20.00

☐	Date	Service	Staff	Active/Last ...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
☐	05/03/2021	$200	AD1	837P	Done	Charge Creat...	05/03/2021	$ 200.00	$ 100.00	$ 0.00	$ 10.00
☐	05/02/2021	$200	13	837P	Done	Charge Creat...		$ 200.00	$ 100.00	$ 0.00	$ 10.00

The Claim Details for the highlighted record correctly shows only Payer 1 and Self Pay. Based on the configuration at the time Charges were Created, the Expected Rate for Payer 2, CMS1500, was $89.00 which is less than the Paid By Other amount of $100.00.

Claim Details

Sagyidev, Borat (000006)
Birth Date: 04/27/1980
Address:
sdfdfd
golders green, IL 78878

Name	Policy Num...	Priority	Notes
837P	dfdfg	5	
CMS1500	mnmn	15	
SELF		99	

$200 Service 200 05/02/2021

Show Reprocessed Charges

837P — NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagno...
05/02/2021	$ 200.00	CHARGE CREATED			DONE	200	Y93.17
05/02/2021	$ 10.00	COPAY ADJ					
05/03/2021	$ 100.00	PAYER PAYMENT					
05/03/2021	$ 90.00	BALANCE ZEROING CR...					
Total Balance:	$ 0.00						

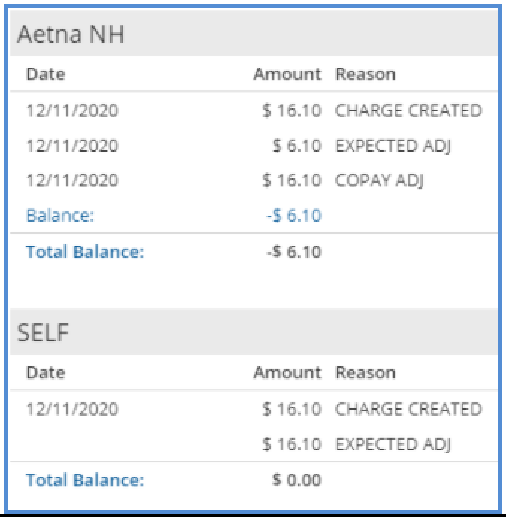
SELF — NOTES & TASKS

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagno...
05/02/2021	$ 10.00	CHARGE CREATED			ACTIVE	200	
Balance:	$ 10.00						
Total Balance:	$ 10.00						

Issues When Copay is More Than Charge or Charge Balance, EV-40

An update was made to address an issue that could occur if a Copay is more than the Charge or Charge balance. Now when adjustments are applied to a Payer Charge, the total of the adjustments (Expected or Contractual, Paid By Other, and CoPay) can no longer exceed the Charge.

Before



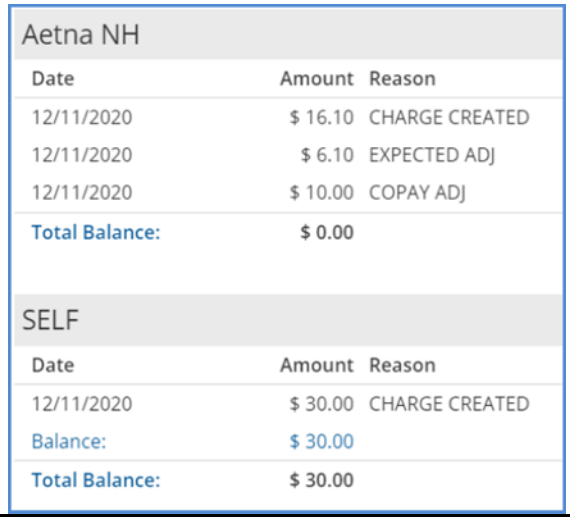
Aetna NH

Date	Amount	Reason
12/11/2020	$ 16.10	CHARGE CREATED
12/11/2020	$ 6.10	EXPECTED ADJ
12/11/2020	$ 16.10	COPAY ADJ
Balance:	-$ 6.10	
Total Balance:	-$ 6.10	

SELF

Date	Amount	Reason
12/11/2020	$ 16.10	CHARGE CREATED
	$ 16.10	EXPECTED ADJ
Total Balance:	$ 0.00	

After



Aetna NH

Date	Amount	Reason
12/11/2020	$ 16.10	CHARGE CREATED
12/11/2020	$ 6.10	EXPECTED ADJ
12/11/2020	$ 10.00	COPAY ADJ
Total Balance:	$ 0.00	

SELF

Date	Amount	Reason
12/11/2020	$ 30.00	CHARGE CREATED
Balance:	$ 30.00	
Total Balance:	$ 30.00	

REPORTS

Updated and New Reports

The following reports were removed:

Fiscal Reports

WaterfallHotfixTroubleshooting
Claim Identification
Unapplied Claim Identification

The following new Reports were added:

Administration Reports

Clients By Payer – The Clients by Payer report lists all Clients grouped by Payer. Each Payer, Payer Code, Payer Plan, Policy Number, Payer Priority, Client Name (and Client Code), Staff assigned to Client, and Payer Start and End Dates are listed. A Client count is included at the bottom of each Payer Group. The available filters are Staff, Payer Start Date, and Payer End Date.

Payers List – The Payers List report lists all Payers by Name, Category Code, Description, Type, Payer Plan as found in the *Configuration > Services/Payers > Payers > Profile* tab. The report also includes Start and End Dates if entered.

Fiscal Reports

Payment Summary – The Payment Summary Report lists all Payers grouped by Category. Totals are provided for each Payer, subtotals for each Category, and a report Grand Total is also included. Columns include From Where (the payment source), Name, Payer Code, Plan, and Payments broken down by Unposted and Posted to GL. The report can be filtered by Payer category and Transaction Start and End Dates.

Payment Detail - The Payment Detail report lists all payments within a date range grouped by Payer. The report lists Client Names and Code, Transaction Date, Service Date, Batch number/id (if entered), PCCN (if entered), Service Program, Service Location, Billing Code, General Ledger Debit /Credit entries, and Payment Amount. The report can be filtered by Service or Transaction Date, Date Range, Finalized or Not Finalized, Staff, Payers, Program, and Location.

_*Payment Detail for Export* - The CSV-friendly report available within the main report above.

Billed vs Received - The Billed vs. Received Report provides details for all Billed and Unbilled Services within a date range grouped by Payer. The report lists Client (Name and Code), Staff, Transaction Date, Service Date, Service Activity, Service Program, Service Location, Billing Code, Unbilled and Billed amounts, and the amount Received if any. Filters can be defined for Service or Transactions Date, Date Range, Staff, Payer, Program, and Location.

_Billed vs Received for Export - The CSV-friendly report available within the main report above.

The following Reports were updated:

Billing Reports

_GL Audit Report – Updated the entry of Client Payment reversals that are the result of a Refund to *REVERSAL* for more clarity.

Client Reports

Services Without Progress Notes – Updated to handle custom progress note table names longer than 32 characters in the database.

Fiscal Reports

Aging Detail By Payer - Added Client and Transaction type columns to this report displaying Client Name and Transaction codes, respectively.

_Aging Detail For Export - The CSV-friendly report available within the main report above.

Claims Report – Updated to Display the Bundled Service Name if the Service is bundled.

_Claims Report for Export - The CSV-friendly report available within the main report above.

Service Detail With Charges - Added a Location column to display the Service's location.

_Service Detail With Charges for Export - The CSV-friendly report available within the main report above.

Unapplied Payments – Updated report to exclude unapplied payments that have been applied or refunded (Status=DONE).

Unprocessed Services – Updated the report to exclude Services that do not have a Charge record.

Client Reports

_Signatures – This subreport now displays all signatures when more than one person has signed. This report is a subreport of Treatment Plans and Progress Note Basic reports.

UPDATES

Ticket #	Description
EV-52	The dbo.vEventsWithComponents view was updated to account for Groups.
EV-197	The Date column on the *Unbilled Charges > Create Charges > Create* tab was widened in preparation for displaying the entire date on date range services.
EV-206	The number of Clients returned in client dropdowns was reduced.
EV-325	The tab order on the *New Remittance* or *Edit Remittances* screen was updated so that the Recent Remittances list is reached after the *CANCEL* and *SAVE* buttons.
EV-342	All trees (oak, ash, elm, fir, etc.) were updated to use the latest available version of Tomcat to ensure available security fixes and improvements for Tomcat are in use.

BUG FIXES

Ticket #	Case #	Description
EV-151		An Unexpected Error no longer occurs when clicking on a blank last date, space to the right of the Category name, on the Timeline.
EV-213		Other Unapplied Payments now have a *MARK AS DONE* option.

EV-219	1080	Diagnosis UI Component no longer throws an Unexpected Error when the Start Date is changed.
EV-221		Fixed a Typo in the Unprocessed Services » Create Charges History Details: ServiceDate.
EV-270		Fixed an issue with creating Occupancy Forms; Forms can now be created without receiving an error.
EV-271		The Client Portal Password Reset Email now displays the agency's name as configured in the redirector. Previously it displayed *If you received this email in error you may safely ignore it. Please contact {FROM_EMAIL} if you need assistance.*
EV-273	78423	An issue was addressed where custom Service Progress Note forms displayed blanks when opened in Service Entry. The cause was due to a NULL value in the Client column. Now EV will automatically populate the Client column in all Form DesignEHR Progress Note tables.
EV-281		Fixed a typo in the CCD File import/Errors Tab.
EV-340	2097	Addressed an issue where Self Pay Statement could use an end-dated or non-billing address. Now when creating Self Pay statements, Client addresses are filtered for only Billing addresses that are active at the time of bill creation. The highest priority address that meets these conditions is selected.
EV-381	1608	Updated the Fiscal Overview and the monthly counts before creating a GL job to exclude unposted Unapplied Payments when these could not be fixed automatically with the v3.22 Hotfix-1 (EV-170). The Unapplied Payments affected are those that had not been posted to GL but the payment created from it by applying was posted to GL.
EV-388		Charges with a Status of Precharge are now no longer included in the unposted GL counts.
EV-417		Fixed an issue with the dollar amount display for the Total Balance in the Claim Details screen.
EV-424	1874	Updated the job Error Message filtering to work on subsequent pages when viewing the *Fiscal Overview > Unprocessed Services > Create Charges > Errors* screen.
EV-489	1902	An issue was reported where under certain conditions a legitimate Payer *TAKEBACK* payment was classified as an *OTHER* type Unapplied Payment, making it impossible to apply. This occurred if a previous *OVERPAYMENT* associated with the same Charge was applied before the *TAKEBACK* was processed. Now Unapplied Payments with a Status of DONE are no longer considered when determining the type an Unapplied Payment.