



ECHOVANTAGE RELEASE NOTES

VERSION 3.26

NEW FEATURES

Introducing Chartless Clients

The Chartless Clients feature allows users to add individuals not receiving Services, a parent, legal guardian, or caregiver for example. Chartless Clients have a limited set of core tabs and are excluded from all Client drop-down lists by default, except when working in the Families feature. The "Chartless Clients: Create" permission in Configuration > Staff/Users > Permissions > Feature is required to add a Chartless Client. When a user is a member of a User Group with this permission enabled, the Has Chart checkbox is displayed on the Add Client screen. This checkbox is selected by default.

Default	Add Chartless Client
<div style="border: 1px solid #ccc; padding: 10px;"> <p>Client ✕</p> <p>Last Name * <input type="text"/></p> <p>First Name * <input type="text"/></p> <p>Middle <input type="text"/></p> <p>Suffix <input type="text"/></p> <p>Birth Date * <input type="text" value=""/></p> <p>Social Security Number <input type="text"/></p> <p><input checked="" type="checkbox"/> Has Chart ←</p> <p style="text-align: right;">CANCEL SAVE</p> </div>	<div style="border: 1px solid #ccc; padding: 10px;"> <p>Client ✕</p> <p>Last Name * <input type="text" value="Griffin"/></p> <p>First Name * <input type="text" value="Peter"/></p> <p>Middle <input type="text"/></p> <p>Suffix <input type="text"/></p> <p>Birth Date * <input type="text" value="01/03/1967"/></p> <p>Social Security Number <input type="text"/></p> <p><input type="checkbox"/> Has Chart ←</p> <p style="text-align: right;">CANCEL SAVE</p> </div>

Unchecking the *Has Chart* checkbox and selecting *SAVE* creates a Chartless Client with the *Profile*, *Contact Info*, and *Documents* core tabs. Maintenance of Chartless Clients is through the *Families* menu or the *Family* tab once associated with a Family.

Griffin, Peter (000089) 🔍 +

👤 Birth Date: 01/03/1967 ☰ Memo

PROFILE CONTACT INFO DOCUMENTS

A new column, *HasChart*, was added to the *dbo.Clients* table to differentiate between charted and chartless Clients. Chartless Clients are assigned *N* and charted Clients are assigned *Y* for the *HasChart* value. If upgrading from v3.25 to v3.26, the value in the *HasChart* column is set to 'Y' for all existing Clients. **If an existing custom form or report should not include both types of Clients (charted and uncharted), update the report to filter to a specific type, for example, HasChart='Y'.**



Introducing Families

The new Families feature, located between Clients and Groups on the main menu, allows associations to be made between Clients, charted and chartless, via a Family or Families. Once a Family is created, users can add *Members* and *Documents*, and complete and attach *Forms*. Members include charted and chartless Clients, and member participation is managed through Start and End Dates which define the Client's active membership period within the Family. Agency defined Roles and Labels are used to clarify the connection between members and provide additional member details.

Configuring User Access to Families

The Families feature is configurable for access from the *Families* main menu option, the new *Family Client* tab, or both. Menu access is determined by User Group in *Configuration > Staff/Users > User Groups > Menu Options*. For the *Clients Family* tab, User Groups may be granted *Read Only* or *Edit* access; by default, the tab is *Disabled*. A *Families:Add* feature permission must be selected for the User Groups responsible for Adding Families. Without the add permission, users with access to the Families main menu option or edit access to the Family tab in the Clients menu can add and remove Clients to/from existing Families; they are not able to create new Families.

Defining Family Member Roles and Labels

The *Family Member Roles* and *Family Member Labels* values must be created in *Configuration > Setup > Defined Lists*. The Family Member Role is a required field when adding members to a Family and can have only one value selected, while the Family Member Label is optional and can have multiple values selected. The Role is intended to define the Members relationship within the Family while the Label is intended to provide additional Member detail.

Defining Forms for the Available Forms List

The use of custom forms is supported in the Family screens - main menu option or Client tab. The application passes the Family id to the form which allows it to be pinned or *Attached* to the family once saved. Users do not need the *Families:Add* permission to view and complete forms. If a user accesses the Families feature via the Family tab in the Clients menu, they need edit permission if they are responsible for completing and attaching forms to a Family. If a form is used to create multiple records per Family, a form with a navigation grid should be created to make those records accessible.

For forms to appear in the *Available Forms* list AND be successfully *Attached* to a Family,

- The form must be tagged with the Form Location of *FAMILY*.
- The table for the custom form must have a *FAMILY* column.
- A field on the form must be mapped to the *FAMILY* column.

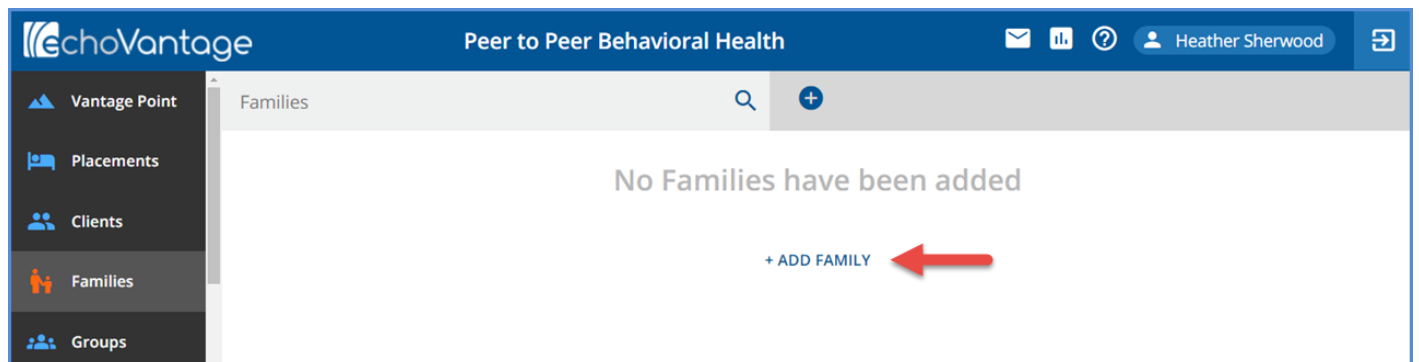
If any forms/tables do not have the *FAMILY* column, the validation will fail when attempting to Delete a Family.

Adding and Managing Families

Once menu access and the *Families:Add* permission are granted to the appropriate groups, users can add and manage Families. The Families feature is accessible from the *Families* main menu option and from a new *Family* tab in the Clients menu. Either location offers the same functionality, however, the *Family* tab in the Clients menu lists all Families to which the current Client is a member. The examples below work through the *Families* main menu option screens. The end of this section highlights the differences in the Clients *Family* tab.

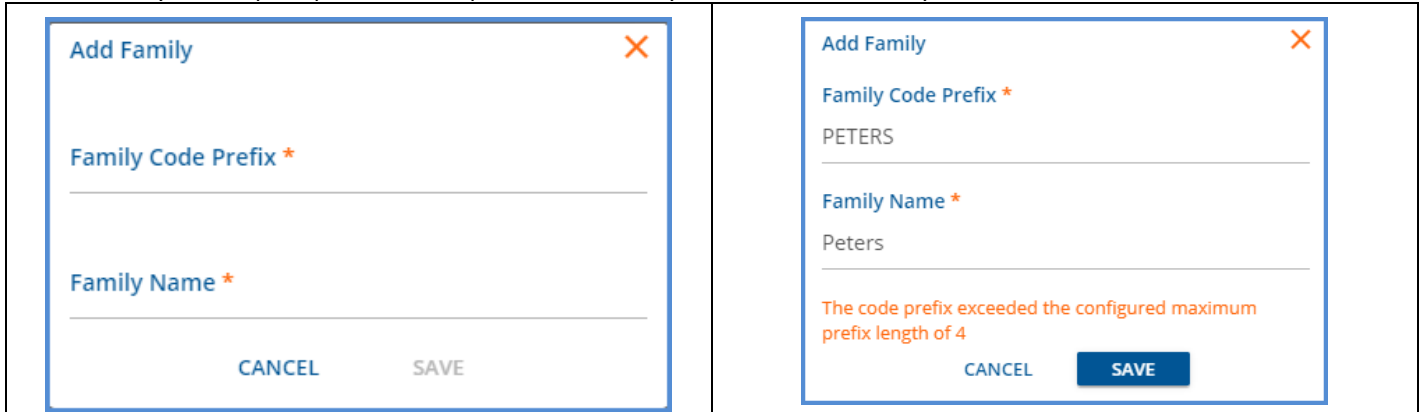
Adding a Family

Navigate to the *Families* main menu options and select the blue *+ADD FAMILY* button to display the *Add Family* screen.



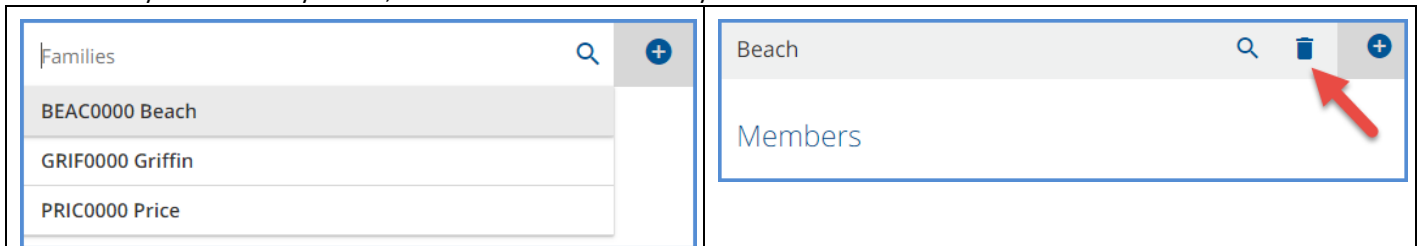


The *Add Family* screen prompts for two required fields, Family Code Prefix and Family Name.



- **Family Code Prefix** – The prefix is limited to 4 characters by default. An error displays on *Save* if more than 4 characters were entered.
 - A 4-digit suffix, beginning with '0000,' is appended to the Prefix to create the Family Code (dbo.Families.Code). These digits are incremented by 1 for each Family added with the same Prefix.
 - The addition of a configuration screen, like the one used for Client Code generation, is planned for a future release.
 - If needed, the default Max Prefix Characters or Max Suffix Digits **can be updated** in dbo.ConfigCodeGeneration.
- **Family Name** – The name can be up to 200 characters.

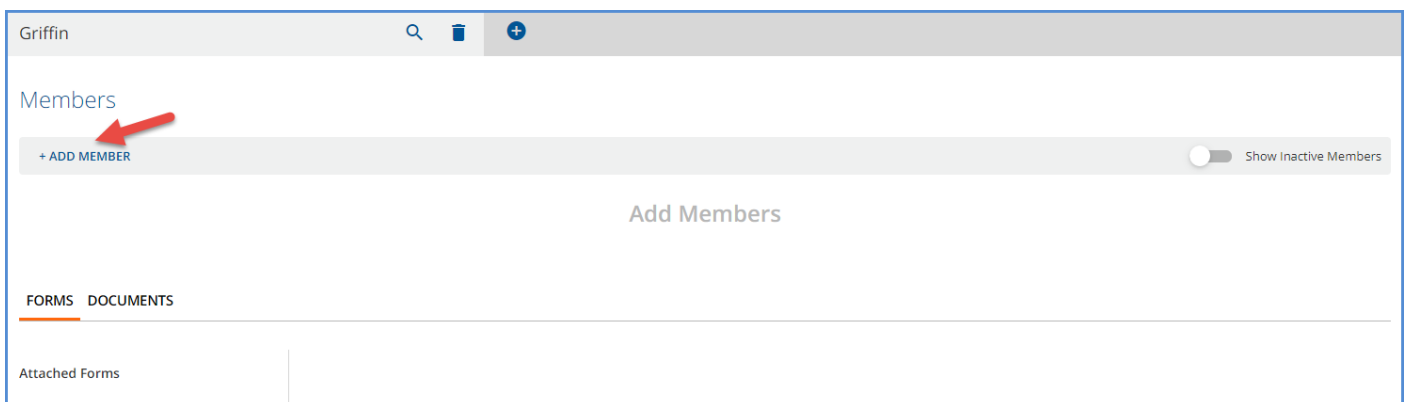
After a Family is successfully added, a card is added to the Family search list.



- The Families list is sorted by Family Name.
- When a card is selected, the Family Name displays in the search bar.
- Delete a Family by selecting the delete icon (blue trash can) to the right of the search bar.
- The delete icon is not present when there are existing relationships with the Family – Members, Forms, or Documents.

Adding Members to a Family

Select the blue **+ADD MEMBER** button to add Members to a Family.





The Add Family Member screen displays.

- **Client** and **Role** are required.
- **Labels** are optional; more than one value may be selected.
- **Start Date** and **End Date** are optional. Use to define the Client’s period of active participation.
 - Use of these dates in place of End-Dating is recommended for historical purposes.
 - Adding a Client that was previously a Member of the Family is allowed as long as the **Start** and **End Dates** do not overlap the existing record.
- Click the blue **SAVE** button to add the Family Member.
- As Members are added the Client list is populated.

Managing Family Members

Client	Relationship	Labels
000092 Griffin, Meg	Minor Child	Signed ROI on File ... Voluntar
000090 Griffin, Brian	Minor Child	Signed ROI on File
000089 Griffin, Peter	Parent	Ok to update by text ... Does
000093 Swanson, Joe	Other relative	No Contact Allowed - Restraining 05/05/2021 - 05/29/2021

- Select the blue **VIEW CLIENT** button for quick access to the Clients menu for that Client.
- Toggle the *Show Inactive Members* slide to enable (blue) or disable (grey).
- Inactive Members Code, Name, and Participation Periods are italicized.
- Use the delete icon (blue trash can) to remove a Client Member from a Family.
- Click anywhere on the row to *Edit a Family member*.



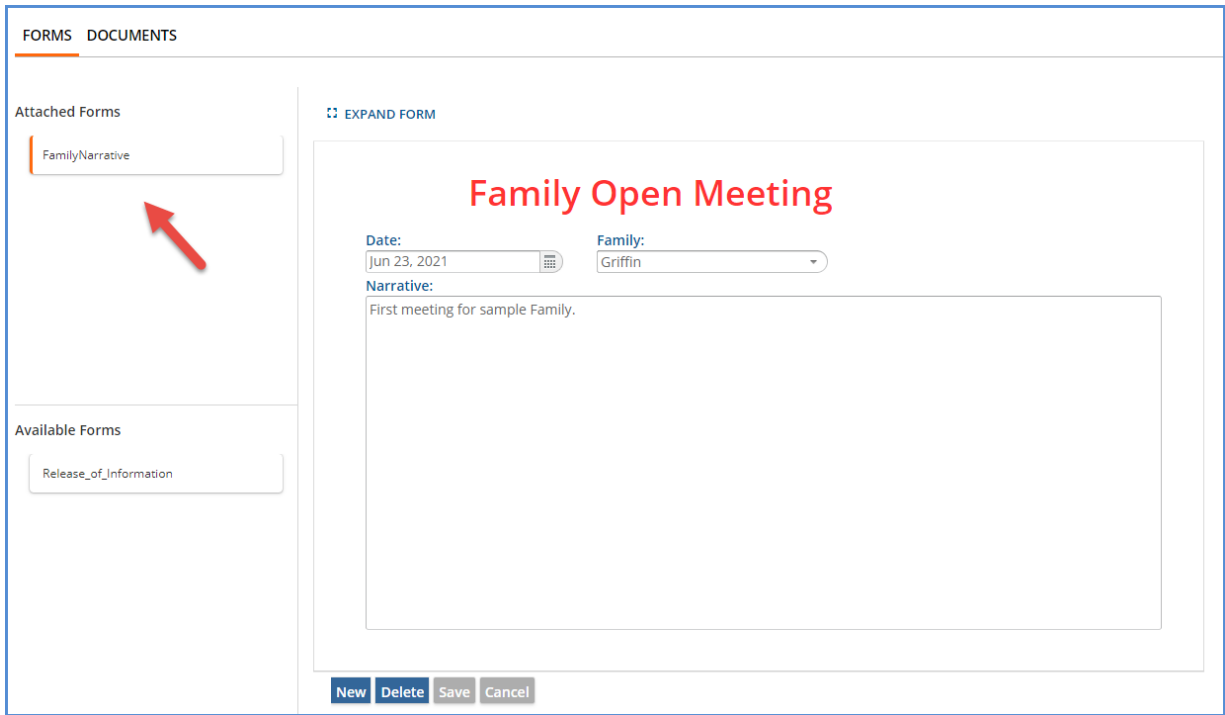
- The Client Code is locked but *Role, Labels, Start Date* and *End Date* may be updated.

Forms with Families

Custom forms can be used with Families. As outlined above, the form must have a Form Location of *FAMILY*, the table must have a *FAMILY* column, and a field on the form must be mapped to the *FAMILY* column. Family Forms function like forms in Placements as they are attached to the Family and removed from the *Available Forms* list on save. Forms in the Families feature support the usual form options and actions like grids, popups, and the unsaved changes notices.

If Forms are configured for use with the Families feature, they are listed in the *Available Forms* list.

Select a form to open it in the right-hand editor window. Click Save when finished to *Attach* the form to the Family.

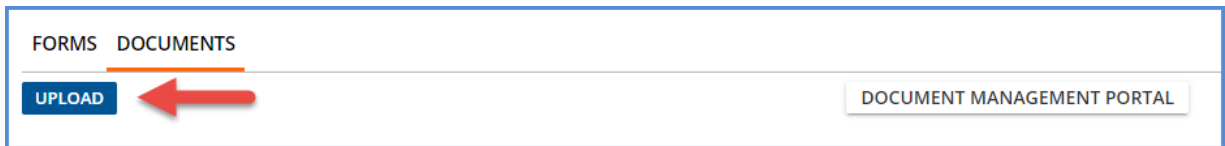


Review attached Forms by selecting the card in the *Attached Forms* list.

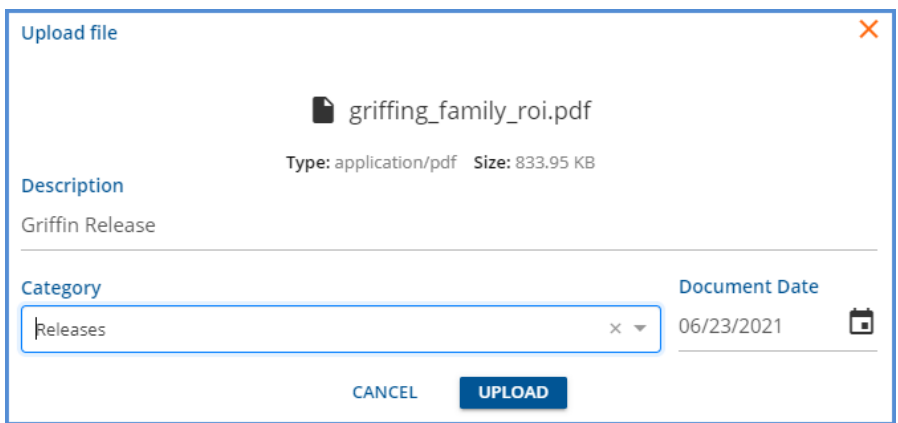
Documents with Families

Managing Family Documents works like Documents in the Clients tab and the same document permissions apply. These permissions are defined in *Configuration > Staff/Users > Permissions > Document Categories*. Note that if a user does not have access to the *Families* main menu option AND just has *READ ONLY* access to the *Family* tab in the Clients menu, the blue *UPLOAD* button is not available, and that user is not able to upload documents. They can simply view documents uploaded by other users.

Users with access to the *Families* main menu option or Edit access to the Clients *Family* tab do see the blue *UPLOAD* button in the *Families* Documents screen.



When *UPLOAD* is selected, a files window is opened. Select the file to upload and then click on *Open*. The following *Upload file* confirmation screen displays.



The uploaded documents are stored in the document management application, Alfresco, in a folder type of *Family*.



FORMS DOCUMENTS

UPLOAD DOCUMENT MANAGEMENT PORTAL

Filter Documents

File Name	Category	Document Date	Description
griffin_family_image.jpg	Profile	06/23/2021	Griffin Image
griffing_family_roi.pdf	Releases	06/23/2021	Griffin Release

Uploaded documents are listed by File Name. Click on the blue *Filter Documents* to enter text for filtering a long document list. The list can also be sorted by *Document Date*, ascending or descending, by clicking the down or up arrow just to the right.

File Name	Category	Document Date	Description
griffing_family_roi.pdf	Releases	06/23/2021	Griffin Release

Hover over *Category* to display a column filter which allows filtering to one specific Category.


FORMS DOCUMENTS

UPLOAD DOCUMENT MANAGEMENT PORTAL

Filter Documents

File Name	Category	Document Date	Description
griffin_family_image.jpg	Profile	06/23/2021	Griffin Image
griffing_family_roi.pdf	Releases	06/23/2021	Griffin Release
archive_correct.png	S.H.I.E.L.D. Memos	06/23/2021	archive

archive_correct.png



Date: 06/23/2021
Description: archive

DELETE DOCUMENT

EDIT PROPERTIES

DOWNLOAD

Select any row to preview, delete, or download the document or Edit the document's properties.

Auditing Family Documents and Forms

Auditing of Family Documents is configurable in *Configuration > Setup > Audit*.

EchoVantage Peer to Peer Behavioral Health Heather Sherwood

TRACK CHANGES TRACK VIEWS

- cmis.ClientDocuments
- cmis.FamilyDocuments
- dbo.AcornRegistrations
- dbo.AdjustmentReasons
- dbo.Adjustments

cmis.FamilyDocuments

Track Changes

CANCEL SAVE

Select *cmis.FamilyDocuments*, check the Track Changes checkbox, and then select *SAVE* to enable Family Documents tracking.



Event Type Start typing to search...		Category Start typing to search...		Staff Start typing to search...	
Client Start typing to search...		Start Date	Start Time	End Date	End Time
SEARCH					
Type	Item	Client	Staff	User	Date/Time
Update	cmis.FamilyDocuments		HS123 Sherwood, Heather	heather.sherwood	06/24/2021 3:14 pm
Insert	cmis.FamilyDocuments		HS123 Sherwood, Heather	heather.sherwood	06/24/2021 3:14 pm
View	FamilyNarrative		HS123 Sherwood, Heather	heather.sherwood	06/24/2021 3:12 pm
View	FamilyNarrative		HS123 Sherwood, Heather	heather.sherwood	06/24/2021 3:12 pm

Once *Track Changes* is enabled, View, Insert, Update, and Delete activity is viewable from the Audit Search main menu option.

Column	Original Value	New Value
date	2021-06-23	2021-06-23
filename	griffin_family_image.jpg	griffin_family_image.jpg
uploadDate	2021-06-23	2021-06-23
documentType	FAMILY	FAMILY
description	Griffin Image	Random Sample Image
id	1425d18c-9689-4d10-a93f-7...	1425d18c-9689-4d10-a93f-7...
mimeType	image/jpeg	image/jpeg
category	Profile	Profile

Clicking on any row displays the Audit Details.

Column	Original Value	New Value
description	Griffin Image	Random Sample Image
id	1425d18c-9689-4d10-a93f-7...	1425d18c-9689-4d10-a93f-7...
mimeType	image/jpeg	image/jpeg
category	Profile	Profile

Inspect description

Original Value	New Value
Griffin Image	Random Sample Image

And clicking on any Audit Details row displays the Inspection screen.



Family Tab from the Clients Menu

The *Family* tab from the Clients menu offers the same functionality as the *Families* main menu option once the Client is added to a Family. Users must have Edit access and the *Families:Add* permission to add the Client to a new or existing Family.

Select the blue **+ADD CLIENT TO FAMILY** to open the *Add Client To Family* screen.

- The *Add Client to Family* screen defaults to the **ADD TO NEW FAMILY** option.
- Change this option by clicking on the blue **ADD TO EXISTING FAMILY**.
- These screens function like the *Add Family* and *Add Family Member* screens found in the *Families* main menu.
- The primary difference is that the *Role*, *Labels*, *Start Date*, and *End Date* on either option refer to the Client in focus, and that Client is added to the New or Existing Family on **SAVE**.
- Saving both examples above adds Client Meg Griffin to two Families.



Griffin, Meg (000092)

Birth Date: 02/04/2005

Memo

TIMELINE SCHEDULE PROFILE FAMILY HOUSEHOLD CONTACT INFO EPISODES ENROLLMENTS ACCOUNT PAYERS DIAGNOSIS DOCUMENTS

+ ADD CLIENT TO FAMILY

- GRIF0000 Griffin
- OTHE0001 Other Family

Members

+ ADD MEMBER Show Inactive Members

Client	Relationship	Labels
000090 Griffin, Brian	Minor Child	Signed ROI on File
000089 Griffin, Peter	Parent	Close Family Friend ... Does not drive
000092 Griffin, Meg	Adult Child	Does not drive

FORMS DOCUMENTS

Attached Forms

FamilyNarrative

Available Forms

Release_of_Information

Select a form

A list of all Families in which the Client is a member displays on the left-hand column of the *Family* tab. The orange vertical bar indicates the currently selected Family and the Family Members, Forms, and Documents information displays in the right-hand section. This right-hand section has the same functionality as the *Families* main menu screen.

Single Per Diem Service Entry

A new option was added to the *Services* main menu that allows the entry of a Single Per Diem Service without the work of using a template. Now hovering over the blue plus displays three additional icons.

EchoVantage Peer to Peer Behavioral Health

Heather Sherwood

Start Date End Date Client Staff Supervisor Defined Filter Status

MARK READY DELETE BULK ACTIONS

No matching rows found

ADD PER DIEM SERVICE

The orange calendar icon is now the *ADD PER DIEM SERVICE* and *CENSUS BILLING* is the top-most icon. Select the calendar icon to add a single Per Diem Service. A *New Service* screen displays.



New Service

Date and Time

Start Date * 06/02/2021 End Date * 06/15/2021 Units * 14

Participants

Client * BEAS0000 Beach, Sandy S Staff * HS123 Sherwood, Heather Supervisor Start typing to search...

Service

CRIPD: Crisis Per Diem

Program * CRI: Crisis Services Location * DART: Dartmouth-Hitchcock Activity * CRI: Crisis Services Attendance * KPT: Appointment Kept Recipient * ADULT: Adult over 18

Diagnosis ⓘ

Client Diagnosis * F10.10: Alcohol abuse, uncomplicated Principal

+ CLIENT DIAGNOSIS

ADD OTHER DIAGNOSIS

ADD PROGRESS NOTE

DELETE ?

Status Not Ready

CANCEL SAVE

Just like the Per Diem Services created via a template, the Add Per Diem Service uses a date range and defaults to one Unit per day.

- Enter the Start Date and End Date to auto-populate the units. Or enter the Start Date and Units to auto-populate the End Date.
- The Service Components entered must match a Per Diem Service Definition before *SAVE* is enabled.
- If the Service Components entered do not match on a Per Diem Service Definition, the blue *No Distinct Service Definition Found* information bar remains and the *SAVE* button remains disabled.

Introducing Alder

A new Document Management service, Alder, is deployed with this release to improve integration with Alfresco and set the stage for more document types in the future. No additional configuration is necessary in EchoVantage but some changes are required in Alfresco. For SaaS hosted customers, the Alfresco changes are completed at the time of the upgrade. After the upgrade, users with access to the Document Management Portal will see a new folder, *CLIENT*, which contains all existing agency document folders. If the *Families* feature is enabled in v3.26 and a Family document uploaded, a *Family* folder is created, and the uploaded document stored in a sub-folder in this *Family* folder.

The v3.26 Upgrade Notes for self-hosted customers will contain detailed information on the Document Service and the required changes in Alfresco.



IMPROVEMENTS

Applying a Payment to a Denied Charge

Payments, manually posted or imported in an 835, can now be posted to a Charge with a Denied Status. Once the payment is applied to the Denied Charge, the Charge behaves as if it were set back to Active status, and the billing process continues normally. For example, the following Claim was denied by Payer BCBS.

BCBSNH								NOTES & TASKS
Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis	
06/10/2021	\$ 75.00	CHARGE CREATED			DENIED	90806	F32.2	
06/10/2021	\$ 8.70	CONTRACT ADJ						
06/15/2021	\$ 0.00	Denial-Diagnosis Issue						
Balance:		\$ 66.30						
Total Balance:		\$ 66.30						

The Payer subsequently remitted \$51.30 and indicated that \$15.00 was the Client’s responsibility. This payment was applied to the Denied charge.

Remittance Details

Transaction Type * PAYER PAYMENT Transaction Date * 06/15/2021

Remittance Amount * \$ 51.30 Remittance Date 06/15/2021 RA Number

PCCN Batch ID PDDNL

Allowed Amount \$ 15.00 Patient Responsibility Waterfall to next payer

Client & Service

Payer * BCBSNH - Anthem BCBS of NH Client AA0000 Aarlyne, Ashley P Service Date 06/10/2021

Counseling 90806 06/10/2021
Staff H5123 Sherwood, Heather
Amount \$ 75.00 Balance \$ 66.30 **DENIED** [VIEW CLAIM](#)

0 Messages & Notes Status **Ready**

+ SAVE AND ADD ANOTHER DELETE CANCEL SAVE

After processing the Remittance, the Claim Details for this charge show balance for Payer BCBS correctly adjusted to \$0.00 and the Patient Responsibility amount of \$15.00 in PreCharge status for Payer SelfPay.

BCBSNH								NOTES & TASKS
Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis	
06/10/2021	\$ 75.00	CHARGE CREATED			DONE	90806	F32.2	
06/10/2021	\$ 8.70	CONTRACT ADJ						
06/15/2021	\$ 0.00	Denial-Diagnosis Issue						
06/15/2021	\$ 51.30	PAYER PAYMENT						
06/15/2021	\$ 15.00	FEE ADJ						
Total Balance:		\$ 0.00						

SELF								NOTES & TASKS
Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis	
06/10/2021	\$ 15.00	CHARGE CREATED			PRECHARGE	90806		
Balance:		\$ 15.00						
Total Balance:		\$ 15.00						



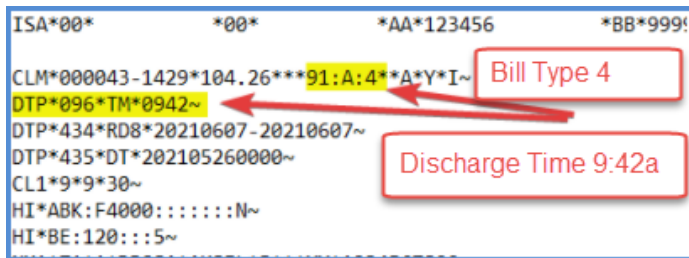
Diagnosis Default in Service Entry

Changes were made to the diagnosis selection process when auto-populating the Client Diagnosis on the Service Entry screen. Now, if the Program on the Service matches either the Enrollment Program or Program on a Client's **active, billable, primary** diagnosis, then that matching diagnosis is used on the Services screen. If there are multiple matches on either Program or Enrollment Program, then the first diagnosis is used. If there is only one active, billable, primary diagnosis, it is the one returned on the Service Entry screen.

Note that when a Client has multiple Enrollments, the Program from one of the Enrollments is selected as the default Program in Service Entry, and the Client Diagnosis field defaults to the appropriate selection for that Program. If the Program component is then changed on the Service Entry screen, the defaulted Diagnosis does NOT update. The user must review the selections on the screen and manually update the Client Diagnosis value to match the newly selected Program if needed.

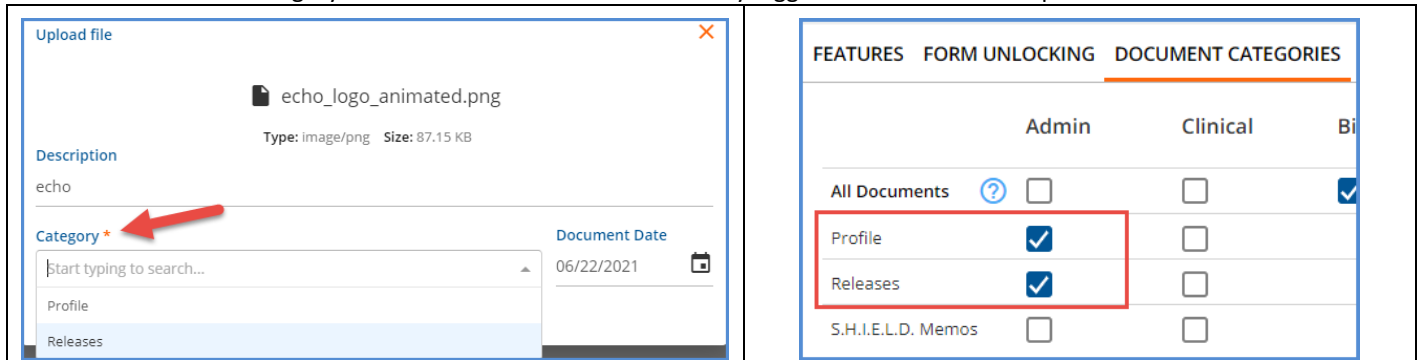
Enrollment Discharge Time on 837I Claim

On the 837I, the Discharge Time is now included in the *DTP*096*TM*HHMM* segment when the Bill Type is '1' (Admit through Discharge) or '4' (Last Claim). The Discharge Time is reported from the associated Enrollment used to calculate the Bill Type and is reported in military time. In the event the Discharge Time is missing, the segment is not reported.



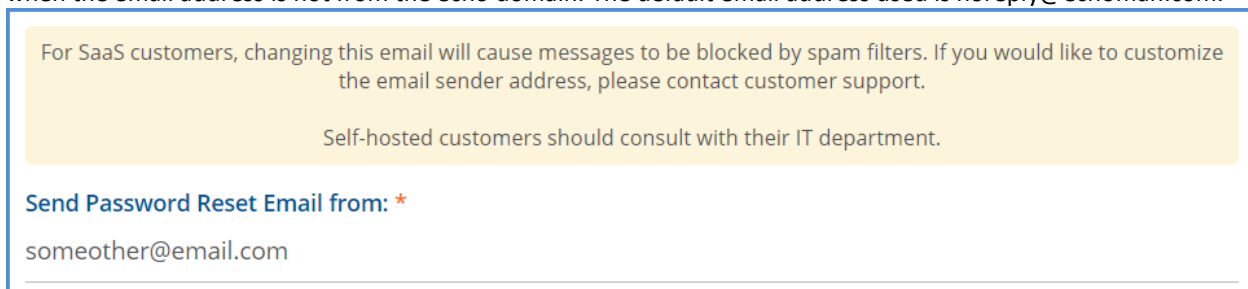
Document Category Required When Uploading

When uploading documents in Clients > Documents, Category is a required field for all users who do not have the *All Documents* checkbox selected in *Configuration > Staff/Users > Permissions > Document Categories*. The values in the Category drop-down list mirror the Document Category Permissions defined for the currently logged-in user's User Group.



Password Reset/InForms Link Emails

The *Send Password Reset Email from:* field on the *Configuration > Setup > Client Engagement > Client Portal* tab and the *Send InForms Link Email from:* field on the *Client Engagement > Informs* tab now display a warning banner with the following message when the email address is not from the echo domain. The default email address used is *noreply@echoman.com*.





Staff Drop-down Lists Sorting

The Staff drop-down lists in EchoVantage were updated to sort alphabetically by Last Name, then First Name. An exception is the Staff drop-down in *Services > Per Diem Billing > +Add Client*, which currently sorts by Client Code. This drop-down will be updated in the next release.

REPORTS

Updated Reports

Administration Reports

Schedule Report – The ‘Staff Code’ column header was changed to simply ‘Staff’ and now both the Staff Name and Code are displayed. The ‘Client Code’ and ‘group Name’ columns were combined; the header is now ‘Client or Group.’ The report displays the Client name and Client code in *Last, First Code* order OR the Group name in the column. And finally, the Service Status column header was changed to Service Created and reports either Yes (Service was created) or No (Service was not created).

Staff Caseload Summary – The Staff Caseload Summary report was updated to only count the Episode if the current date is between the Staff Role Start and End Dates. If the End Date for the Episode Staff is the same as the report run date, the Episode is not counted in the caseload. Just as before, closed Episodes are not counted.

Clients Missing Pay Source – This report was updated to exclude Chartless Clients.

Billing Reports

_SelfPayStatement – The Self Pay Statements report was updated to sort statements by Client Last Name.

Client Reports

Client List – This report was updated to exclude Chartless Clients.

Medical Face Sheet - This report was updated to exclude Chartless Clients.

UPDATES

Ticket #	Description
EV-854	In preparation for future Report improvements, a change was made for the appId to be passed as a parameter to all reports for the currently logged in user.

BUG FIXES

Ticket #	Case #	Description
EV-191		The Balance on the Charge Card in the <i>Client & Service</i> section in Remittance Entry is no longer updated on SAVE. Previously, a Charge that was overpaid updated the Balance to a negative amount on SAVE.
EV-568	1325	An issue was addressed where the number of Services in the job confirmation modal differed from the number of Services in the toast message. Updates were made in the code to use a single endpoint and the query was updated to ensure that Service AddOns are not being included in the Service count
EV-576		A check was added to ensure that an open-ended Service component has not been saved in a Service before allowing a successful swap to a Component that uses codes, in <i>Configuration > Services/Payers > Components</i> . If the open-ended component has been used, the change now fails to save. Previously, it the component was allowed to change after it had been saved in a Service, the application crashed when revisiting the Service.
EV-639		An issue was addressed where duplicate, active, primary diagnoses with overlapping dates caused the 837I billing job to crash. Now multiple results returned are counted as if the diagnosis was present and the job runs without crashing.
EV-647	SUPINC	Updated views used by the core PHQ9 forms to the latest value set code version after the last update to <code>dbo.codes</code> .



EV-648	ALEX	An issue was addressed where using multiple tabs or users working job screen concurrently could allow bad data conditions. Now once a job is Finalized, it can no longer be retried, reversed, or finalized again on a separate tab or by another user.
EV-778	2720	Addressed an issue where deleting an Add-on Service caused the calendar view to display the main Service as an Event. Now deleting and Add-on Service does not alter the calendar view on the Scheduler.
EV-779	2090	An issue was reported where signing a popup form errored on SAVE even though the parent form could be signed successfully. Addressed by increasing the <i>TargetTable</i> column size in the <i>dbo.SignedRecords</i> table.
EV-896	SOUTHLT	Fixed a bug where tabbing to open a popup form caused the popup to open multiple times. Now tabbing to open a popup form, even when a User Validation Field is used, only opens the form once.