

ECHOVANTAGE RELEASE NOTES

VERSION 3.27

NEW FEATURES

Multiple Staff on Events

Users can now associate multiple Staff with an Event or series of Events by using the new Ancillary Staff field when scheduling or editing Events. One or more Ancillary Staff may be added when scheduling an Event of any Type, Service, Group, or Staff Time, and these scheduled Events display on the Ancillary Staff's Scheduler view. For example, quickly schedule a training session for multiple (or all) Staff by creating a single Event. The example below shows a single Staff Type Event for July 15, 2021.

Start * 7:30 AM	End * 8:00 AM	Ancillary Staff Appendix Appe	Sample Staff Time Event H51 Heather, Sherwood × JD123 Duncan, Julie × LB123 Bradbard, Louis ×
7:30 AM	8:00 AM	Ancillary Staff X AD001 Drosa, Aksel J JE1 Emerson, Joe X	× HS1 Heather, Sherwood × JD123 Duncan, Julie × LB123 Bradbard, Louis
	× •	Ancillary Staff X AJD001 Drosa, Aksel J X JE1 Emerson, Joe	× HS1 Heather, Sherwood × JD123 Duncan, Julie × LB123 Bradbard, Louis ×
	× •	× AJD001 Drosa, Aksel J × JE1 Emerson, Joe ×	× HS1 Heather, Sherwood × JD123 Duncan, Julie LB123 Bradbard, Louis ×
		EH123 Hadam, Elija	h
	× •	📫 Intake 🕞	
X v		-	
	X v	× •	× •

If a Staff is listed as Primary Staff and as a member of the selected team in Ancillary Staff, they are removed from Ancillary Staff when the Event is created. Selecting the Intake Team shows the Event on each Staff's calendar.

LINICAL HO	ME FISCAL OVERVIEW	DASHBOARDS INSIGHTS								
Scheduler					¢ 0					
Staff	× AJD001 Drosa, Aksel J × LB123 Bradbard, Louis	Q NEXT AVAILABLE								
Clients	Select clients									
Resources	s Start typing to search									
Location	Select location		▼ Category	Select category	•					
Day	Week Month Comp	are			Today 🖌 🕨					
	AJD001 Drosa, Aksel J HS1 Heather, Sherwood		JD123 Duncan, Julie	JE1 Emerson, Joe	LB123 Bradbard, Louis					
MA 00					4					
MA 0	7:30 AM	7:30 AM	7:30 AM	7:30 AM	7:30 AM					
00 AM	w: Weekly Case Review	Review: Weekly Case Review	Review: Weekly Case Review	Review: Weekly Case Review	Review: Weekly Case Review					
.30 AM										

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<u>July 23, 2</u>021

When a Service is created from a Service Type Event, the Event still displays for the Ancillary Staff, but it is locked to indicate a Service for the Primary Staff was created. The Event displays in the usual grey with the lock icon for the Primary Staff and the original Event blue with a locked icon for Ancillary Staff.

	Scheduled Service	Type Event		Service Created From Event					
Day	y Week Month Comp	are	Day	y Week Month Com	pare				
	AJD001 Drosa, Aksel J	HS1 Heather, Sherwood		AJD001 Drosa, Aksel J	HS1 Heather, Sherwood				
7:00 AM			7:00 AM						
AM.	7:30 AM	7:30 AM	7:30 AM	7:30 AM	7:30 AM				
8:00	Review: Weekly Case Review	Review: Weekly Case Review	8:00 AM	Review: Weekly Case Review	Review: Weekly Case Review				
8:30 AM			8:30 AM						
9:00 AM	9:00 AM	9:00 AM	9:00 AN	@ 9:00 AM	9:00 AM				
9:30 AM	BE0000 Beach, Sandy - CRI	BE0000 Beach, Sandy - CRI	9:30 AN	BE0000 Beach, Sandy - CRI	BE0000 Beach, Sandy - CRI				

If a Service was created, the *Edit Scheduled Event* screen for the Ancillary Staff's Event no longer has the *Create Service From Event* option.

Resources	Event Resources			
	Start typing to search			
		DELETE	CANCEL	UPDATE EVENT

The Calendar view of Group Events for an Ancillary Staff is like the Service Events view. When a Service is created from a Group Event, the Event displays for the Ancillary Staff with the lock icon, and the Event is grey for the Primary Staff and the original teal for the Ancillary Staff.

	Scheduled Gro	up Event		Service Created From	n Group Event
	AD789 Drosa, Aksel	HS123 Sherwood, Heather		AD789 Drosa, Aksel	HS123 Sherwood, Heather
10:00 AM			10:00 AM		
10:30 AM			10:30 AM		
11:00 AM	11:00 AM	11:00 AM	11:00 AM	â 11:00 AM 🛛 🔾	â 11:00 AM 🛛 🔾
11:30 AM	Alcohol Support - Adults,	Alcohol Support - Adults,	11:30 AM	Alcohol Support - Adults,	Alcohol Support - Adults,
12:00 PM	1400031/C	1 100001/2	12:00 PM	Mondays	Mandaus

Just as before, once a Service is created for a Client, the CREATE SERVICE option changes to VIEW SERVICE.

Participants					
Client		Program	Location	Activity	Attend
000073 Sherwood,	VIEW SERVICE	MH	COMM	COUN	KPT
000013 Hiwan, Tayl	CREATE SERVICE	MH	СОММ	COUN	SCH
000072 Field, John	CREATE SERVICE	MH	СОММ	COUN	SCH

Attempting to DELETE an Ancillary Staff's Event (Service or Group type) with a Service attached results in the following message.

Cannot delete Events with Services.



July 23, 2021

Scheduling Conflicts

While creating Events, if a Staff schedule conflict is found, a blue informational message displays on the bottom left. Events are still created or updated when **only** a Staff scheduling conflict is found.

Resources	Event Resources		X 🔻
(i) This event has	s staff The heduling conflicts		CANCEL CREATE EVENT
Click on the blue	e message to view the scheduling	conflict details.	
Scheduling Cont	flicts	×	
Staff			

Drosa, Aksel

07/12/2021 7:30 AM to 8:15 AM

Heather, Sherwood

07/12/2021 7:30 AM to 8:15 AM

If Event Resources are used, the check for Resource conflicts occurs when the Event is created or updated. If conflicts are found, an orange warning message displays. Events are **not** created or updated when a Resource conflict is found.

Resources	Event Resources × Media Room One or more resources are already booked for this time	X 🔻	
A This event has	resource Ficheduling conflicts	CANCEL CREATE EVENT	CREATE SERVICE FROM EVENT

Like Staff schedule conflicts, click on the orange warning message to view the event resource scheduling conflicts.



If conflicts are found for both Staff and Resources, the warning message indicates this. Events are **not** created or updated due to the Resource conflicts.

Resources	Event Resources × Media Room One or more resources are already booked for this time	X	<i>,</i>
A This event has	staff and resource scheduling conflicts	CANCEL	CREATE EVENT



And again, selecting the message displays the scheduling conflict details for both Staff and Resources.

Scheduling Confl	licts	×
Staff		
Sherwood, Heat	ther	
07/22/2021	8:00 AM to 9:00 AM	
Resources		
Media Room		
07/22/2021	8:00 AM to 9:00 AM	

Search for Next Available

The Search for Next Available feature is also updated to consider appointments where Staff are listed as Ancillary Staff. If listed as either the Primary Staff or as Ancillary Staff on an Event (and the *Show Time as Available* checkbox is not selected), the Staff is not indicated as available. For example, in the Scheduler Compare view below, two Staff are scheduled for an Event (one Primary and one Ancillary), and two Staff are available.

Schedu	ıler										۵ 🗘
2	Staff	× HS	123 Sherwoo 1234 Bunker,	d, Heatl Kathy	her × AD789 Drosa, A	ksel	× JE123 Emerson, Joe	× -	Q NI	EXT AVAIL	ABLE
Cli	ents	Selec	t clients					•	07/21/	2021	
Day	y V	Veek	Month	Comp	bare				Today		►
	1	AD789 Di	rosa, Aksel		HS123 Sherwood, Heather		JE123 Emerson, Joe		KB1234 B	Bunker, Kath	у
6:30 AM											
7:00 AM											
7:30 AM											
8:00 AM		8:00	AM		8:00 AM						
8:30 AM	SAMJO	000 Ada	ams, John -	S	AMJ0000 Adams, John -		($\backslash $			
9:00 AM	GINP				i xr			ノヘ			
9:30 AM											
10:00 AM			—								

Using the Search for Next Available feature to search during that same time returns just the two Staff as available.

Search for Next	t Available		×
Date and T	ime		BY DATE BY STAFF
Start Date * 07/21/2021	End Dat	e* .021 🗖	Wednesday, July 21 2021
Start Time * 08:00 AM	End Time * 9:00 AM	Duration Time * 60	Emerson, Joe Bunker, Kathy COMPARE ALL

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July 23, 2021

IMPROVEMENTS

Sliding Fees Redesign

There are now two styles of Sliding Fees available. The new style supports multiple income brackets for matching fee schedules like those based on the Federal Poverty Guidelines. In contrast, the previously existing style supports a simplified fee schedule that uses a single set of income brackets for all household sizes. When adding a new Sliding Fee schedule, an example of each layout and a brief description are shown. Once the Sliding Fee Label is entered, both blue *CREATE* buttons are enabled, and the user must select which style to use.

Sliding Fee			×
Sliding Fee Labe Federal Poverty	l * Example		
Choose a sli	iding fee style		Existing
	Rates		Household Sizes
Household Sizes	GMI Brackets	GMI Brackets	Rates
Multiple sets of in schedules like tho	come brackets are good for matching fee se based on federal poverty levels. CREATE	A single set of inco creating simplified	ome brackets for all household sizes is good for d fee schedules.



July 23, 2021

New Style

The Sliding Fee schedule below is an example of the new style that uses multiple monthly income thresholds for each household size. Just as before, the Sliding Fee Label and Start Date are required, and a selection of Percentage or Flat Rate define the Rate Type. Users can optionally assign an End Date to define the active period for the schedule or a Defined Filter to restrict the fee to specific Services. The income amount entered is the maximum monthly income allowed for the corresponding Household Size and Rate.

Fede	ral Poverty	Exa	mple		۹								
Sliding	Fee Label *										Versions		
Federa	al Poverty Ex	ample	e			SUBMIT	1				01/01/2021	× -	
Start F	ate *			Pate 7		Defin	d Eiltor						
01/01/	2021		End Date	E P	rcentage O Fla	Rate Start	t typing to search				*		
			2				71 0						
2.2													
5	~ ~	×	· +8 ×8										
				-		-	-	2					
1	А	04	B Pato 07	C 04	0~	E 0v	F Ov	0.04	H		J	*	
2	Household	17PT	0.00 %	5.00.%	10.00 %	25.00.%	50.00 %	65.00%	80.00.%	100.00 %			
3	1	07	\$1.074	\$1.610	\$2.146	\$2,415	\$2.683	\$2.951	\$3,220	000000			
4	2	0-7	\$1.452	\$2,178	\$2,903	\$3,266	\$3,629	\$3,992	\$4.355	\$9,999,999			
5	3	0-7	\$1,830	\$2,745	\$3,660	\$4.117	\$4.575	\$5.032	\$5,490	\$9,999,999			
6	4	07	\$2,208	\$3,313	\$4,416	\$4.968	\$5,520	\$6.072	\$6.625	\$9,999,999			
7	5	0+	\$2.587	\$3.880	\$5.173	\$5.820	\$6.466	\$7.113	\$7,760	\$9,999,999			
8	6	0.7	\$2,965	\$4,448	\$5,930	\$6.671	\$7.412	\$8,153	\$8.895	\$9,999,999			
9	7	0+	\$3,343	\$5,015	\$6,686	\$7,522	\$8,358	\$9,194	\$10,030	\$9,999,999			
10	8	04	\$3,722	\$5,582	\$7,443	\$8,373	\$9,304	\$10,234	\$11,165	\$9,999,999			
11	9	0+	\$4,100	\$6,150	\$8,200	\$9,225	\$10,250	\$11,275	\$12,300	\$9,999,999			
12	10	07	\$4,478	\$6,717	\$8,956	\$10,076	\$11,195	\$12,315	\$13,435	\$9,999,999			
13	11	0.	\$4,857	\$7,285	\$9,713	\$10,927	\$12,141	\$13,355	\$14,570	\$9,999,999			
14	12+	07	\$5,235	\$7,852	\$10,470	\$11,778	\$13,087	\$14,396	\$15,705	\$9,999,999			

When this Sliding Fee schedule is selected as the Client Fee for the Self-Pay Payer, the appropriate fee is determined by using the *Clients > Household* tab values for Monthly Income and Household Size. In the example below, the Client has a monthly income of \$3,000.00 and a household size of 2; the correct Fee Amount of 25% is displayed.

Authorizations			
	No Authorizatio	ns Configured	
	+ ADD AUTHO	DRIZATION	
Client Fees			
Dates	Amount	Defined Filter	
Start Date: 07/01/2021	25%		+
	+ ADD CLI	ENT FEE	

Existing Style Improvements

The income brackets on the left are now a single *Max. GMI* column on the existing Sliding Fee style. Previously both the *Min* and *Max* were entered.

	A		В		С	D	E			A	В	С	
		07		07	Household Size	07		1		0.4	Household Size	07	
2	Min. GMI	07	Max. GMI	07	1 ⁰ 7	2 ⁰ 7	3+	2	2	Max. GMI 💁	1 ⁰ 7	2 0.4	3+
1	\$0	07	\$100		0.50 %	0.25 %	0.00 %	3	;	\$950	0.50 %	0.50 %	0.5
ļ	\$101		\$200		0.75 %	0.50 %	0.25 %	4	L	\$1,150	1.00 %	0.50 %	0.5
5	\$201		\$300		1.00 %	0.75 %	0.50 %	5	;	\$1,350	1.50 %	1.00 %	0.5



July 23, 2021

Copy Sliding Fee Schedule to New Version

A new copy forward feature is now an available selection when adding a *NEW VERSION* of either style of Sliding Fee. When the *Copy Existing* option is selected in the *NEW VERSION* drop-down, the screen switches to new version mode with the Sliding Fee Label, Rate Type, Household Sizes, Rates, and Income information copied forward.

Federal Poverty Example	(२ 🖯					
Sliding Fee Label * Federal Poverty Example	SUBMIT			Versions 01/01/202	1	×	▼ NEW VERSION V
Start Date * 01/01/2021 End Date	Rate Typ	Rate Type Defined Filter Percentage Flat Rate Start typing to search 					Copy Existing
The new version is created using Federal Poverty Example	; the same styl	e as the firs	t version.				
Sliding Fee Label * Federal Poverty Example	SUBMIT			Versions Select a v	ersion		✓ NEW VERSION ✓
New Version							
Start Date * End Date	Rate Ty	rentage O Flat	Define t Rate Start	d Filter typing to search		•	
∽ ~ \ \ \ + \ × + ×							
A B	C Ov	D Or	E 0v	F 0+r	G Ov	H Or	l ^
2 Household Size 0.00 %	5.00 %	10.00 %	25.00 %	50.00 %	65.00 %	80.00 %	100.00 %
3 1 •• \$1,074	\$1,610	\$2,146	\$2,415	\$2,683	\$2,951	\$3,220	\$9,999,999

Select All for Service Components

In *Configuration > Services/Payers > Service Definitions* and *Defined Filters,* there is now a *Select All* option when selecting Service Components. Select the checkbox to mark all values for the current Component and deselect to unmark all. Just as before, individual components may be selected or deselected.

All Selected	None Selected	Some Selected		
Program	Program	Program		
Select All	Select All	- Select All		
ADP Alcohol and Drug Program	ADP Alcohol and Drug Program	ADP Alcohol and Drug Program		
ADP-2 New ADP Program	ADP-2 New ADP Program	ADP-2 New ADP Program		
ANGMNG Anger Management	ANGMNG Anger Management	ANGMNG Anger Management		
AOD Alcohol and Drug	AOD Alcohol and Drug	AOD Alcohol and Drug		
BULK Pulls Services Descenting	BULK Pulk Services Descention	BULK Devices Descention		
CANCEL SAVE	CANCEL SAVE	CANCEL SAVE		



<u>July </u>23, 2021

Editing A Family Name

There is now an option to edit a Family Name. The edit icon displays next to the search icon once the Family is selected from the Families search list.



When selected, an Edit Family screen displays.

Edit Family	×
Family Name *	
Other Fam	
CANCEL	SAVE

REPORTS

Updated Reports

Administration Reports

Staff Caseload Detail – The query used to return Enrollment information was updated, so that duplicate enrollments are no longer included on the report in error.

Billing Reports

_837 Audit - Updated so Start Time does not display for Per Diem Services.

_837I Audit - Updated so Start Time does not display for Per Diem Services.

Client Reports

Attendance Report - Updated to handle the NULL start times of Per Diem Services.

Progress Note Basic - Updated to handle the NULL start times of Per Diem Services.

Services Without Progress Notes – The report query was updated to include a check for NULL TargetIDs. The running time is now reduced to seconds instead of minutes, preventing timeouts.

Fiscal Reports

Claims Report – The Claims Report was updated to no longer include *Precharge* or other unfinalized amounts when determining the Client balance to match the Client balance in the Claims list.

_*Claims Report for Export* – The CSV-friendly report available within the main report above.

The following Fiscal reports were updated to handle the NULL start times of Per Diem Services.

Outstanding Charges

_Outstanding Charges for Export

Service Detail by Defined Filter

_Service Detail by Defined Filter for Export

Service Detail With Charges By Client



July 23, 2021

- _Service Detail With Charges By Client for Export
- Service Detail With Charges By Staff
- _Service Detail With Charges By Staff for Export
- Service Detail With Charges
- _Service Detail With Charges for Export
- Service Status Report
- _Service Status Report for Export
- Services List
- Unprocessed Services

UPDATES

Ticket #	Description
EV-787	On the Remittance Entry screen charge cards, <i>Outgoing</i> and <i>Active</i> charges have a green background, and <i>Done</i> charges have a grey background.
EV-965	The Living Arrangements defined list header was changed to <i>Client Household Living Arrangement</i> from <i>Client Profile Living Arrangement</i> .
EV-986	How data is pulled and stored in the CMS1500Masters table was updated to prevent a CMS 1500 reporting job from failing with no indication of why. The <i>PolicyHolderNumber</i> field was increased to 30 characters, and the <i>PolicyHolderPhoneNumber</i> is now populated with the first 10-digits from the associated Client Phone Number.
EV-994	When the <i>View Client</i> link is selected in the <i>Clients > Family</i> tab for a Chartless Client, the user is now routed to the Profile tab of the Chartless Client.
EV-1089	The Program grid on the <i>Clients > Enrollments</i> screen now uses the same sort order applied to Episodes, newest first to oldest, with end-dated Programs listed at the bottom.
FV-1130	Updates were made to the display name of the OHBH Charge Customization Acorn. Now when selecting the Acorn in <i>Configuration > Services/Payers > Payers > Processing</i> , the two choices are <i>OH BH Redesign</i> and <i>OH BH Charge Customization</i> .
EV-1136	Improvements were made to the speed of any queries using Defined Filters.

BUG FIXES

Ticket #	Case #	Description
		A bug was addressed where two unfinalized jobs with similar data could cause invalid data scenarios. For example, processing a Remittance after the associated Charge was included in an unfinalized Reprocessing job resulted in the Remittance job getting stuck without a clear Error.
EV-172		Now, if a user starts a Reprocessing or Remittance posting job and the job contains items <i>in or related</i> to items also in a different unfinalized job type, the application shows an error that indicates the job type when the processing occurs.
EV-623	2501	A bug was fixed where the Expanded Race input could not be saved in <i>Clients > Profile</i> . Now the <i>SAVE</i> button is enabled and saves successfully for any Race/Expanded Race combination.
EV-852		The Resources drop-down list on the <i>Schedule</i> or <i>Edit an Event</i> screen is now only populated with Resource values that are available for the Event Date entered. Resource Availability is defined in <i>Configuration > Scheduler > Resources</i> . If scheduling a series of Events with a Resource selected that is not available for the entire period, the Resource scheduling conflict warning message displays.



July 23, 2021

EV-855		Event Resource conflicts are now also checked when dragging the Event to a new time on the Scheduler.							
EV-899	3180, 3156	An error was addressed that prevented saving a Service Status Change when the Service was locked (signed progress note) and the user only had the <i>Service: Change Status</i> permission enabled. Now the <i>Service: Change Status</i> permission is no longer affected by the <i>Services: Edit Signed Services</i> permission regardless of performing bulk actions or using the Service entry form.							
		A bug was addressed where creating a Self Pay job for one Client resulted in statements for every Client with a Self Pay balance. Now when a single Client is selected, only a statement for that Client is created. In addition, the Confirmation and on-screen action pop-up messages were updated to display the correct counts and use the word Clients in place of Balances.							
		Confirm Job Creation X Are you sure you want to create a job for 1 client?							
EV-905	3298	CANCEL CREATE JOB							
EV-907	ТНО	A bug was reported that multiple Contractual Adjustments were not being considered in the waterfall. For example, if a Contractual Adjustment was applied at the time of charge creation and then an additional Contractual Adjustment was required at the time of Remittance entry, only the first adjustment waterfalled to the next Payer, overstating that Payers balance. Now the sum of all contractual adjustments waterfall to the next Payer.							
EV-934		The delete Family icon is now validated for, and only appears if there are no Members or Documents attached.							
EV-938	3360	Terminated Staff no longer appear in the Recipient drop-down in send-able (to Inbox or Group Mailboxes) forms.							
EV-958	2704	A bug was reported where multi-tab forms could not be viewed in InForms if the form was signed. Now, if a multi-tab form is shared via InForms, it can be signed. In addition, if the form was already signed and shared as read-only, all tabs are viewable when shared via InForms.							
EV-960		The Staff list is now sorted by Last Name in the <i>Per Diem Billing > Add Client</i> Staff select drop-down.							
EV-999		In <i>Clinical Home's Search for Next Available</i> feature, the behavior of the <i>SAVE</i> button was updated. It is now disabled if any Search fields contain an error and enabled when the Search fields are error-free.							
EV-1087		Field validation was added to the <i>Search for Next Available</i> Start and End Time fields to allow only valid numbers.							
EV-1093	3757	A bug was reported where processing a second <i>Reversal of Prior Payment</i> Remittance type resulted in that reversal being inserted in the Claim more than once. Now when a <i>Reversal of Prior Payment</i> is processed, it is applied to the Claim once.							
EV-1101	3736	A bug was reported where the Per Diem diagnosis drop-down list did not show all diagnoses, duplicate diagnoses, for example. Now all Client diagnoses are returned in the drop-down list, even if a duplicate or inactive.							
EV-1135		A bug was addressed where a Defined Filter associated with a Sliding Fee schedule could not be removed. Now clearing the Defined Filter and selecting <i>SAVE</i> removes the filter from the fee schedule.							