



ECHOVANTAGE RELEASE NOTES

VERSION 3.28

NEW FEATURES

Introducing Batches

A new feature in the Remittances main menu, *Batches*, streamlines and reorganizes the payment entry and reconciliation processes. In EchoVantage, a *Batch* is like a check, whether paper or electronic funds transfer and the new *Batches* screen lists summary information for each of these "checks." The new *Batches* feature is turned on by default in version 3.28, and access to the original Remittances screens remains after upgrading. The original screens retain their existing functionality with one important difference - the 835 import is only via *Batches* unless this new feature is disabled. The following sections cover the new *Batches* feature in detail.

Transaction Date		Transaction Date	Batch ID	Remittance Date	RA Number	Check Amount	Payments	
	08/20/2021	08/19/2021	698701	08/19/2021	BCBS-08-01	\$ 195.00	\$ 130.00	MARK AS READY
Batch ID	08/11/2021	08/11/2021	CC01-0803	08/11/2021		\$ 1,477.20	\$ 1,477.20	MARK AS READY
	07/31/2021	08/02/2021	698700	08/02/2021	BCBS-07-01	\$ 130.00	\$ 130.00	MARK AS READY
Remittance Date	08/20/2021	08/16/2021	CC-2	08/16/2021	CC-2018-RESMH	\$ 1,846.50	\$ 0.00	MARK AS READY
RA Number	08/19/2021	08/15/2021	CC-1	08/15/2021	CC-2018-001	\$ 6,104.62	\$ 6,104.62	MARK AS READY

The grid on the *Batches* screen is populated as batches are created. *Not Ready* Batches are grouped and listed first, sorted by Transaction Date, newest to oldest. A *Not Ready* batch is when any of the associated remittances within the Batch have a *Not Ready* status. The remaining batches are sorted by Transaction Date, newest to oldest. Due to the sort criteria, new batches that do not have a payment associated with them yet are displayed in the second grouping.

New Batch ✕

Transaction Date * 📅

Batch ID

Remittance Date 📅


RA Number

Check Amount *

CANCEL SAVE

- Click on the blue plus "+" to manually add a batch. This opens the *New Batch* screen shown on the left.
- After saving, the *View Batch* screen for the new batch is displayed.
- Hover the mouse over the blue plus "+" to display the orange *Import 835* icon.
- The 835 Import process automatically creates a batch using the value from the TRN02 segment as the *Batch ID*.
- *RA Number* is not populated by the import process but can be added after the import is complete.
- Just like the original Remittances screen, the 835 import chip in the upper right-hand corner indicates the import status; selecting this chip displays a list of recent imports.

Import 835 ✕



HJS_DD2_CC2_835.txt (1.30 KB)
Import 835 - 000000052

Payer *
CC01 ✕

Transaction Date *
08/24/2021 📅

Include Patient Responsibility
 Denials Waterfall to Next Payer
 Import Contractual Adjustments
 Use Allowed Amount as Paid Amount
 Mark Crossover Payers Billed

CANCEL **IMPORT AND CLOSE**



While the sort order helps keep the *Not Ready* batches at the top of the grid, filters are provided to make searching and finding a specific batch fast and easy. Use any combination of filters to help drill down the results listed in the grid.

If the batch summary information needs updating, use the blue pencil icon on the far-right of a batch row to edit that Batch's summary information. The *Edit Batch* screen opens and requires the same two fields, *Transaction Date* and *Check Amount*, as the *New Batch* screen. Editing a batch is the only way to populate the *RA Number* field after an 835 Remittance is imported.

Note that Payment is not listed on the Edit Batch screen because the Payment amount is a system-calculated value.

Use the *MARK AS READY* button to mark all eligible records in a Batch as *Ready*, like the Bulk actions in the original Remittances screen.

- Select *CONTINUE* when the confirmation box appears.

- A confirmation toast displays with a count of the Remittances successfully marked as ready.
- The *MARK AS READY* button is disabled if all payments in the *Batch* are in *READY*, *DONE*, or *BATCHED* status.

Peer to Peer Behavioral Health						
Transaction Date	Batch ID	Remittance Date	RA Number	Check Amount	Payments	
08/20/2021	698701	08/19/2021	BCBS-08-01	\$ 195.00	\$ 130.00	MARK AS READY
08/11/2021	CC01-0803	08/11/2021		\$ 1,477.20	\$ 1,477.20	MARK AS READY
07/31/2021	698700	08/02/2021	BCBS-07-01	\$ 130.00	\$ 130.00	MARK AS READY
08/20/2021	CC-2	08/16/2021	CC-2018-RESMH	\$ 1,846.50	\$ 0.00	MARK AS READY
08/19/2021	CC-1	08/15/2021	CC-2018-001	\$ 6,104.62	\$ 6,104.62	MARK AS READY

4 remittances successfully marked as ready

Once batches are added, either manually or via the 835-import process, selecting any batch row opens the *View Batch* screen.



View Batch

The *View Batch* screen lists all payment records associated with the Batch. A new table, *dbo.TransactionGroups* and a new column in *dbo.Remittances*, *TransactionGroup*, were added to establish the relationship between Batches and Remittances. An example of the *View Batch* screen is shown below.

Transaction Date	Batch ID	Remittance Date	RA Number	Check Amount	\$ 1,292.55	\$ 0.00	\$ 0.00		
08/11/2021	CC01-0803	08/11/2021	BW-082421	\$ 1,477.20	Payments	Adjustments	Patient Responsibility		
Service Date	Status	Client	Service Date	Charge	Allowed Amount	Adjustment	Payment	Patient Respon...	Denials
	Ready	000029 Wren, T...	11/01/2018	Residential Men...	\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00	
	Ready	000029 Wren, T...	11/01/2018	Residential Men...	\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00	
	Ready	000029 Wren, T...	11/02/2018	Residential Men...	\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00	
	Ready	000029 Wren, T...	11/02/2018	Residential Men...	\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00	
	Ready	000029 Wren, T...	11/03/2018	Residential Men...	\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00	
	Ready	000029 Wren, T...	11/03/2018	Residential Men...	\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00	
	Not Ready	000029 Wren, T...	11/04/2018		\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00	

- A Service Date and Client filter are available to help refine the search results to expedite finding a specific Client.
- In the header area starting from the left, the information for the five Batch Summary fields is displayed.
- This information was entered on the *New Batch* or updated and saved on the *Edit Batch* screens (Transaction Date, Batch ID, Remittance Date, RA Number, and Check Amount).
- *Payments*, *Adjustments*, and *Patient Responsibility* are system-calculated values and are updated each time new payments are added, or existing payments are edited.
- If the Client or Charge does not match when importing an 835 file, the payment row is created in *Not Ready* status and no value displays in Client or Charge or both.
- If a \$0.00 Payment is received, the Denial Reason is displayed.
- Select any row to open the *Edit Row* screen and view/edit the payment information.
- Select the blue plus "+" icon to add a row to the current Batch, opening the *Edit Row* screen also.

Edit Row

The *Edit Row* screen has the most in common with the existing *Add Remittance* or *Edit Remittance* screens. *Edit Row* is where payments and adjustments are entered and matched with their associated Charges. This new screen has some notable improvements over the original Remittance screens.

Edit Row Screen	Add or Edit Remittance Screen
The header lists the Batch Summary information and updates the <i>Payment</i> , <i>Adjustment</i> , and <i>Patient Responsibility</i> amounts as each row is added or updated. These constantly updated totals make it easy to see at-a-glance if the Batch reconciles with the total amount received.	A list of recently entered Remittances only is displayed. The total of Payments and Adjustments entered must be calculated manually.
The amount of data entry required is limited because the <i>Transaction Date</i> , <i>Batch ID</i> , <i>Remittance Date</i> , and <i>RA Number</i> are provided by the Batch.	These values must be populated for each transaction.
A single transaction (row) accommodates the Payment amount, Contractual Adjustment, and even additional <i>Transaction Types</i> .	Each Transaction Type requires a separate transaction. A Payment, Contractual Adjustment, and other adjustments (Psychiatric Reduction, i.e.) for one Claim requires entry of three distinct Remittances.



Adding a Row

Select the blue plus "+" on the bottom right of the *View Batch* screen to add a new row—the following screen displays.

The screenshot shows the 'Edit Row' screen with the following details:

- Transaction Date: 08/20/2021
- Batch ID: 698701
- Remittance Date: 08/19/2021
- RA Number: BCBS-08-01
- Check Amount: \$ 195.00
- Payments: \$ 130.00
- Adjustments: \$ 50.00
- Patient Responsibility: \$ 20.00

A red arrow points to a plus sign (+) in the bottom right corner. The main area contains a search bar for 'Client' and a large button labeled 'Select a Charge' with a dollar sign icon.

The header has the same information as the *View Batch* screen. Note the values for *Payments*, *Adjustments*, and *Patient Responsibility* for comparison later. Next, select a Client from the drop-down list to display the list of Charges.

The screenshot shows the 'Edit Row' screen with the following details:

- Transaction Date: 08/20/2021
- Batch ID: 698701
- Remittance Date: 08/19/2021
- RA Number: BCBS-08-01
- Check Amount: \$ 195.00
- Payments: \$ 130.00
- Adjustments: \$ 50.00
- Patient Responsibility: \$ 20.00

The Client is set to '00021 Appleton, Scott'. The Charges list is displayed with the following columns: Name, Policy Num..., Priority, Notes. The selected charge is 'T1016 Case Management' with a balance of \$ 100.00. The list is filtered by 'ACTIVE OR OUTGOING' and sorted by 'Service Date'.

Annotations in the screenshot include:

- (a) Orange vertical line indicating the currently selected Charge.
- (b) Orange circle around the 'Notes & Tasks' and 'View Claim' links.
- (c) Orange circle around the 'Remittances' section.

At the bottom, there are buttons for '+ SAVE AND ADD ANOTHER', 'DELETE', 'CANCEL', and 'SAVE'. The status is 'Not Ready'.

The Charges list is grouped by *Active or Outgoing* first, then sorted by Service Date, newest to oldest, followed by the *Done* Charges. Further, refine the list by selecting a Payer and filtering by Service Date if desired.

- (a) The orange vertical line indicates the currently selected Charge.
- (b) Current Payer Claim information is displayed with links to the Claim Details – *Notes & Tasks* and *View Claim*
- (c) Remittances



- There is clickable access to view any imported *Messages & Notes*.
- *Payment* is the only required field, and Transaction Types are assigned based on the value of the Payment amount.
 - Positive Amount = Payer Payment
 - Zero Amount = Denial
 - If a \$0.00 *Payment* amount is entered, a Denial Reason field displays.

Remittances

Allowed Amount: \$ 80.00

Contractual Adjustment: \$ 20.00

Payment *: \$ 0.00

Denial Reason: Denial-Duplicate (selected)

Patient Responsibility

PCCN

+ ADD TRANSACTION

- The Denials column on the *View Batch* screen is also updated with the selected reason.

Transaction Date	Batch ID	Remittance Date	RA Number	Check Amount	\$ 130.00	\$ 75.00	\$ 20.00		
08/20/2021	699701	08/19/2021	BC85-08-01	\$ 195.00	Payments	Adjustments	Patient Responsibility		
Service Date	Status	Client	Service Date	Charge	Allowed Amount	Adjustment	Payment	Patient Respons...	Denials
	Not Ready	000021 Applet...	08/04/2021	Case Managem...	\$ 75.00	\$ 25.00	\$ 65.00	\$ 10.00	
Client	Not Ready	000021 Applet...	08/11/2021	Case Managem...	\$ 75.00	\$ 25.00	\$ 65.00	\$ 10.00	
	Not Ready	000021 Applet...	08/18/2021	Case Managem...	\$ 80.00	\$ 25.00	\$ 0.00	\$ 0.00	P Denial-Duplicate

- Negative Amount = Reversal of Prior Payment

Wren, Taylor Ben

11/02/2018 99899 Residential Mental Health

Name: CC01, Policy Num...: 454654654, Priority: 60, Notes

CC01

Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
11/02/2018	\$ 184.65	CHARGE CREATED	12/06/2019		OUTGOI...	99899	F20

Balance: \$ 184.65

Total Balance: \$ 184.65

Remittances

Allowed Amount: \$ 184.65

Contractual Adjustment

Payment *: \$ -184.65

Patient Responsibility

PCCN: 11

+ ADD TRANSACTION

- The record in `dbo.Remittances` for this transaction shows the following TransactionDefinition assigned.

Results	Messages
1	Amount: -184.65, RemittanceDate: 2021-08-11, TransactionDate: 2021-08-31, TransactionDefinition: 20200702174508560B77D01296DC440CF915
1	id: 20200702174508560B77D01296DC440CF915, TransactionCode: P, ReasonName: REVERSAL OF PRIOR PAYMENT



- The following fields may be optionally populated: *Allowed Amount*, *Contractual Adjustment*, *Patient Responsibility*, and *PCCN*.
- The Batch supplies the Transaction Date, Remittance Date, Batch ID, and RA Number, so these values are not repeatedly entered.
- Use the **+ADD TRANSACTION** button to enter other Transaction Types related to this Payment and Charge combination.
 - The Transaction Type list uses the same Transaction Types as the original Remittances screen apart from the excluded *Non-Specific Payer Payment* type.
 - A Denial, Contractual Adj, and a Psychiatric Reduction are all captured in a single row entry in the example below.

Edit Row

Transaction Date: 08/20/2021 | Batch ID: 698701 | Remittance Date: 08/19/2021 | RA Number: BCBS-08-01 | Check Amount: \$ 195.00

\$ 130.00 (Payments) | **\$ 75.00** (Adjustments) | **\$ 20.00** (Patient Responsibility)

Client: Appleton, Scott

Payer: BCBSNH

Remittances: Allowed Amount \$ 80.00 | Contractual Adjustment \$ 20.00

Transaction Type: Psychiatric Reduction | Amount \$ 5.00

Buttons: + SAVE AND ADD ANOTHER, DELETE, CANCEL, SAVE

- The *Adjustments* balance in the header was updated from \$50.00 to \$75.00 after the row was saved.
- If an additional Transaction Type is added in error, use the delete icon (blue trash can) to remove it.
- If the *Waterfall to Next Payer* checkbox is selected, all Transactions in the row (Payment and Adjustments) will have that setting applied.
- Selecting the blue **+SAVE AND ADD ANOTHER** saves the new row and clears the screen so the next Client and Charge can be selected for a new row.
- Selecting the blue **SAVE** records the new entry and remains on the *Edit Row* screen for that new entry.



Editing a Row

Select an existing row on the *View Batches* screen to view and update that transaction group. The example below is an imported 835 batch that has some *Not Ready* payment rows.

View Batch										
Transaction Date	Batch ID	Remittance Date	RA Number	Check Amount	\$ 1,477.20	\$ 0.00	\$ 0.00			
08/24/2021	CC01-0803	08/11/2021		\$ 1,477.20	Payments	Adjustments	Patient Responsibility			
Service Date	Status	Client	Service Date	Charge	Allowed Amount	Adjustment	Payment	Patient Respons...	Denials	
	Not Ready		11/05/2018		\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00		
	Ready	000029 Wren, Ta...	11/01/2018	Residential Ment...	\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00		
	Ready	000029 Wren, Ta...	11/01/2018	Residential Ment...	\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00		
	Ready	000029 Wren, Ta...	11/02/2018	Residential Ment...	\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00		
	Ready	000029 Wren, Ta...	11/02/2018	Residential Ment...	\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00		
	Ready	000029 Wren, Ta...	11/03/2018	Residential Ment...	\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00		
	Ready	000029 Wren, Ta...	11/03/2018	Residential Ment...	\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00		
	Not Ready	000029 Wren, Ta...	11/04/2018		\$ 184.65	\$ 0.00	\$ 184.65	\$ 0.00		

Selecting the first *Not Ready* row displays the following *Edit Row* screen.

Edit Row

Transaction Date: 08/24/2021 | Batch ID: CC01-0803 | Remittance Date: 08/11/2021 | RA Number: | Check Amount: \$ 1,477.20 | Payments: \$ 1,477.20 | Adjustments: \$ 0.00 | Patient Responsibility: \$ 0.00

Client: Start typing to search...

Could not find charge matching:

Client: No matching Client | Payer: Carroll County | Service Date: 11/05/2018

Remittances

Allowed Amount: \$ 184.65 | Contractual Adjustment: _____

Payment*: \$ 184.65 | Patient Responsibility: _____

PCCN: 01

+ ADD TRANSACTION

Waterfall to Next Payer | Status: Not Ready

+ SAVE AND ADD ANOTHER | DELETE | CANCEL | SAVE

The payment information was imported, but a Charge needs to be attached. Find the Client in the drop-down list on the left to display a list of Charges. Then enter a Payer and Service Date to refine the results further.



After selecting a Charge, Claim information displays for that Payer, and **+SAVE AND ADD ANOTHER** and **SAVE** buttons are enabled.

Viewing and Editing Imported 835 Payment Transactions

While the 835-import process remains largely untouched, the handling of one transaction type merits additional explanation, Non-Specific Payer Payments. If an imported 835 file contains a PLB segment or Non-Specific Payer Payment,

- The transaction is imported but it is NOT included in the batch. When this happens, the batch *Check Amount* and the total of the row *Payments* are off by the PLB amount exactly.

- The PLB transaction record is editable in the original Remittances screen because it was not associated with the batch. The image below is from the original Remittances screen. The PLB transaction has a checkbox; the batch payment record does not.

All other imported 835 transactions are available to view and edit in the *View Batch* and the *Edit Row* screens. The same Transaction Definitions are assigned based on the payment value – positive payments are Payer Payments, zero payments are Denials, and negative payments are Reversal of Prior Payment transaction types.



Auditing Batches

Navigate to *Configuration > Setup > Audit* to enable auditing for *Batches*. Locate the `dbo.RemittanceBatches` table and select the checkbox to enable *Track Changes*. Tracking changes in `dbo.RemittanceBatches` captures the Insert, Update, View, and Delete events related to batches.

Type	Item	Client	Staff	User	Date/Time
View	Remittance		H5123 Sherwood, Heather	heather.sherwood	08/27/2021 8:42 am
Update	dbo.Remittances	000029 Wren, Taylor	H5123 Sherwood, Heather	heather.sherwood	08/27/2021 8:41 am
View	Remittance		H5123 Sherwood, Heather	heather.sherwood	08/27/2021 8:41 am
View	Remittance		H5123 Sherwood, Heather	heather.sherwood	08/27/2021 8:41 am
Update	dbo.RemittanceBatches		H5123 Sherwood, Heather	heather.sherwood	08/27/2021 8:41 am

It is important to note that enabling *Track Changes* for `dbo.RemittanceBatches` captures the batch information only. Any Update, Insert, or Delete events for a row (payment, adjustment, other) within the batch affects the `dbo.Remittances` table. Enabling *Track Changes* for the `dbo.Remittances` table includes row activity in the audit results.

Additional Notes About Batches

Although both the new *Batches* and the original *Remittances* functionality are available, they are not interchangeable. Existing *Remittances* records are only available from the original *Remittances* screens. Transactions associated with a payment row entered or imported using *Batches* are viewable in the original *Remittances* screen but updates can only be made in the *Edit Row* screen only. A "batched" *Remittance* row does **not** have a checkbox on the *Remittances* home screen.

Status	Payer	Client	Amount	Service Date	Transaction Date	Allowed Amount	Matching Charge	Messages & Notes
Not Ready	BCBSNH - Anthem BCBS of NH	000021 Appleton, Scott	\$ 5.00	08/18/2021	08/20/2021	\$ 0.00	\$ 100.00	0
Not Ready	BCBSNH - Anthem BCBS of NH	000021 Appleton, Scott	\$ 20.00	08/18/2021	08/20/2021	\$ 0.00	\$ 100.00	0
Not Ready	BCBSNH - Anthem BCBS of NH	000021 Appleton, Scott	\$ 0.00	08/18/2021	08/20/2021	\$ 80.00	\$ 100.00	0

If a batched row is selected from *Remittances*, a banner displays at the top of the screen and includes a link to *View in Batch*.

BATCHES REMITTANCES

⚠ This remittance is part of a batch and can't be modified here. [View in Batch](#)

000021 Appleton, Scott
Service Date: 08/18/2021 \$ 5.00 BCBSNH VIEW CLAIM

Why is the old *Remittance* screen retained? Until the final round of polish is added to the *Batches* feature, some workflows require or are more manageable in the original *Remittances* screen.

- The *Mark Ready*, *Mark Not Ready*, and *Delete* bulk actions are only available here and offer a way to update transactions across batches. A batch *MARK AS READY* action is available but is limited to the single batch.
- Imported 835 PLB sections can only be edited and marked as Ready on the original *Remittances* screen. It is not included in the batch.
- Searching for *Denials* or *Reprocessed* *Remittance* records is easier due to the Status filter. For example, if a *Remittance* associated with a Batch is reprocessed, the copy (*Reprocessed*) *Remittance* created by reprocessing is associated with that Batch. Nothing on the Batch screen indicates that it contains a *Reprocessed* *Remittance*, and the filters available are Batch specific, not row (*remittance*) specific. In this case, it is more expedient to search for the *Reprocessed* *Remittance* on the original screen, select the row, and then select the link to *View in Batch* than to click through the *Batches* looking for the *Reprocessed* row(s) not associated with a Charge.



REPORTS

Updated Reports

Administration Reports

Schedule Report– This report was updated to include Ancillary Staff. Previously on the Primary Service Staff was reported.

Billing Reports

_SelfPayStatementSubReport - The alignment of the Self Pay Statement was updated to align the *Return* and *To* addresses with the windows of a #9 double window envelope when folded in thirds.

Client Reports

Services Without Progress Notes – The report was updated to now include Services with a *NULL* TargetId (no progress note) AND Services that have an invalid TargetId (one that points to an invalid progress note record).

UPDATES

Ticket #	Description
EV-955	Updates were made to prevent Alerts from being sent to Staff who have been end-dated on the Client's Episode.
EV-1081	Updates were made to the display order of Authorizations on the <i>Clients > Payers</i> screen. Now, when a Client has multiple authorizations, they are sorted with active authorizations on top (future authorizations then Active authorizations with blank Start Dates) followed by inactive authorizations sorted by Start Date descending.
EV-1134	An update was made to pull the most recent PCCN for all billing methods: 837P, CMS 1500, 837I, and UB04 and the associated reports to ensure that the correct number is submitted even after multiple denials.
EV-1213	Error messages were added to alert users when a <i>Mend</i> session does not create when opening the Event or Service. These Error Messages include <ul style="list-style-type: none"> • Telemed session cannot be created due to invalid credentials • No telemedicine session • Telemedicine only available for Staff or Supervisor • Telemedicine session is only available within 30 minutes of the scheduled service • Cannot join telemed sessions in the past • Preparing telemedicine session • Retrying...
EV-1276	In <i>Configuration > Setup > Client Engagement</i> , the text next to the toggle to enable the InForms Email Links is now <i>Enable Email Links</i> instead of <i>Enable Single Use Links</i> .

BUG FIXES

Ticket #	Case #	Description
EV-1004 EV-1162	1200	A bug was reported regarding the UB04 billing report splitting claims for the same client across pages. The cause was due to the <i>dbo.UB04Masters</i> table not correctly handling the <i>Retry</i> and <i>Reverse</i> billing job actions. Now when a job is <i>Retried</i> , the job record is not duplicated; when the job is <i>Reversed</i> , the record associated with that job is removed.
EV-1143		A bug was fixed where the Bulk <i>Mark as Ready</i> option in Services marked a <i>Service</i> as <i>Ready</i> when only an <i>Other Diagnosis</i> was entered without the "Principal" radio button selected. The issue was addressed by selecting the <i>Principal</i> radio button of an <i>Other Diagnosis</i> by default when no Client Diagnoses are entered for the Client.



EV-1144	2680	A bug was reported where two days were returned in the results when searching for a single day in the Scheduler <i>Search For Next Available</i> . Now when searching for a single day using <i>Search For next Available</i> , only one day is returned in the results as expected.
EV-1215		A bug was addressed where the Sliding Fee Style displayed in the UI changed when the New Style sliding fee label was edited and saved. A manual refresh was required to correct the display issue. Now when the label is edited, the type displayed remains unaffected.
EV-1235		An issue was reported where the quick information for an Event with a zero-minute duration displayed incorrect information. Updates were made to ensure that the Start and End times are always pulled from the Event. Additionally, for consistency, Events with a zero-minute duration display in one whole row, no matter the minutes per row setting, in the same manner as one-minute Events display.
EV-1262	401	A bug was reported that not all Families were being searched when adding a Client to a Family. Now the entire list of Families is searched when adding a Client in the <i>Add Client to Family</i> screen. The available Families are no longer limited to the small list displayed in the drop-down box.
EV-1447		An issue was reported where the Search Time was prolonged if Searching without a Staff person selected on the Scheduler. Updates were made and now Searches without a staff process almost instantaneously.
EV-1465		An issue was reported indicating that the Bulk Service processing could be slow when creating a job for many items. Processing time for jobs with 50+ pages of results now typically complete is less than a second except when Defined Filters are used. Future improvements are planned for the Defined Filter view to address the speed of Bulk Service processing when a Defined Filter is in use.
EV-1486	5034	A billing bug was reported where a Waterfall Charge to Self Pay was created in error when a denial was entered against a secondary Payer (a Primary Payer denial processed correctly), even though the <i>Waterfall to the next payer</i> checkbox was not selected in the Remittances screen.



Claim Details
Conway, NH 03818
08/01/2021 AA Alcohol & Drug Counseling

BCBS1		
Date	Amount	Reason
08/24/2021	\$ 125.00	CHARGE CREATED
08/15/2021	\$ 25.00	PAYER PAYMENT
08/15/2021	\$ 65.00	BALANCE ZEROING CREDIT
08/24/2021	\$ 35.00	CONTRACT ADJ
Total Balance:	\$ 0.00	

CC01		
Date	Amount	Reason
08/15/2021	\$ 400.00	CHARGE CREATED
08/15/2021	\$ 25.00	PAID BY OTHER
08/15/2021	\$ 35.00	CONTRACT ADJ
08/24/2021	\$ 0.00	Denial-COB Missing
Balance:	\$ 340.00	
Total Balance:	\$ 340.00	

SELF		
Date	Amount	Reason
08/15/2021	\$ 65.00	CHARGE CREATED
Balance:	\$ 65.00	
Total Balance:	\$ 65.00	

This bug was addressed and now a secondary Payer’s denial does not waterfall when the *Waterfall to the next payer* checkbox is not selected. After processing the Charge is correctly updated to *Denied*.

BCBS1								NOTES & TASKS
Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis	
08/09/2021	\$ 125.00	CHARGE CREATED	08/24/2021		DONE	AA - TS, CR, GT	F10.151	
08/09/2021	\$ 35.00	CONTRACT ADJ						
08/10/2021	\$ 25.00	PAYER PAYMENT						
08/10/2021	\$ 65.00	BALANCE ZEROING CREDIT						
Total Balance:	\$ 0.00							

CC01								NOTES & TASKS
Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis	
08/10/2021	\$ 400.00	CHARGE CREATED	08/24/2021		DENIED	AA	F10.151	
08/10/2021	\$ 35.00	CONTRACT ADJ						
08/10/2021	\$ 25.00	PAID BY OTHER						
08/24/2021	\$ 0.00	Denial-COB Missing						
Balance:	\$ 340.00							
Total Balance:	\$ 340.00							

Billing History

BCBS1 08/24/2021
CC01 08/24/2021

No Waterfall to Self Pay

EV-1495

A bug was reported where signatures were not displayed when viewing some signed Form DesignEHR forms from the Timeline or Inbox. The issue was restricted to forms using multiple data containers, and the cause was Form DesignEHR incorrectly using the child container record id as the target id when initializing the form. The issue was addressed and now signatures display correctly for signed forms anywhere a form is viewed – Timeline, Inbox, InForms, Client Forms, Progress Notes, etc.

EV-1515

5050

A bug was addressed where Form DesignEHR forms flash and load infinitely when accessed from a History form. Now forms load properly when opened from a History form.