



ECHOVANTAGE RELEASE NOTES

VERSION 3.34

NEW FEATURES

Introducing Labs in the Main Menu

The process of managing lab orders, reviewing results, and addressing errors was redesigned and is now Labs in the main menu. The three Labs screens: (1) Orders & Results, (2) Unsolicited, and (3) Errors, makes it easy to access, manage and review lab information that was previously only accessible on a per Client basis, or in the case of Errors, simply stored in the database.

Configuring Labs

The *Orders Labs* permission checkbox was removed from the Staff Profile page and is now permissible by User Group. An *Order Labs* User Group is created by the upgrade process and includes any existing Staff that had the *Order Labs* checkbox selected on their *Staff > Profile* page. The *Order Labs* permission controls whether the user can order labs and is the only permission granted to this new User Group by default. If the *Order Labs* checkbox is not selected for any Staff when the upgrade is performed, this User Group is not created.

Permissions														
Control permissions by User Group														
FEATURES	FORM UNLOCKING	DOCUMENT CATEGORIES	CLINICAL RESOURCES	GROUP MAILBOXES	REPORTS MENU	Admin	Clinical	Billing	Intake	Front Desk	Limited	Reception	Authorized ...	Order Labs
CCD Export		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CCD Import		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chartless Clients: Create		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client App Access		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clinical Decision Support		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Direct Messaging		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Echo InForms		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educational Resources		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency Access		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Families: Add		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Occupancy Forms: Edit		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Occupancy Forms: View		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Occupancy User Configuration		Controls whether the user can order labs		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Order Labs		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Service: View Progress Note		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Access to the new Labs main menu option should also be enabled for Staff responsible for managing lab orders and results. The menu access is granted in *Configuration > Staff/Users > User Groups > Menu Options*. The upgrade process does not enable menu access to Labs for any User Group by default.

Order Labs

Name: Order Labs | Description: Staff that can order labs

PROFILE | MENU OPTIONS | STAFF

The Chartless Tab: Select a form | Disabled | Read Only | Edit

Families

Labs

Groups



ORDERS & RESULTS

The Orders & Results tab provides a view of all agency initiated orders and matched results, whether solicited or unsolicited. Results are matched to a Client, either automatically by the system using the Client Code or manually by a user. Unmatched, unsolicited results land on the *UNSOLICITED* page. Filters are available to refine the list of Client orders and results displayed, while icons make it easy to determine pending orders and unacknowledged or acknowledged results. The orders and results displayed here are visible on a Client’s Timeline, just as before.

Last Updat...	Order Date	Client	Ordering Staff	Tests	Lab	Result Status
02/16/2022	11/22/2021	PARP0000 Parker, Peter	JE1 Emerson, Joe	CBC (INCLUDES DIFF/P...	Century Hospital	
02/16/2022	04/30/2021	000009 Kirk, James, Capt		CBC (INCLUDES DIFF/P...	Century Hospital	
02/16/2022	12/03/2021	8KXGJOLD Abbott, Ang...	JE1 Emerson, Joe	Unsolicited - Lipid 1996...	Century Hospital	
02/15/2022	12/29/2021	PARP0000 Parker, Peter	JE1 Emerson, Joe	CBC (INCLUDES DIFF/P...	Century Hospital	
02/15/2022	02/15/2022	PARP0000 Parker, Peter	JE1 Emerson, Joe	CBC+HEMATOLOGY RE...		
02/14/2022		00000038 Jonas, Vicky			Century Hospital	
02/14/2022		8KXGJOLD Abbott, Ang...			Century Hospital	
02/14/2022	02/14/2022	8KXGJOLD Abbott, Ang...	JE1 Emerson, Joe	CBC (INCLUDES DIFF/P...	Century Hospital	
02/14/2022	01/19/2022	00000058 Allen, Barry	JE1 Emerson, Joe	CBC (INCLUDES DIFF/P...		
02/11/2022	12/29/2021	8KXGJOLD Abbott, Ang...	JE1 Emerson, Joe	CBC (INCLUDES DIFF/P...	Century Hospital	
02/11/2022	01/19/2022	PARP0000 Parker, Peter	JE1 Emerson, Joe	CBC (INCLUDES DIFF/P...	Century Hospital	

- A row displays for each order placed via the Change Healthcare interface or matched unsolicited result.
 - The screen is paginated and displays the first 50 rows, sorted by *Last Updated* in descending date order.
 - Select the blue Client Code and Name hyperlink to view that Client’s record.
 - If a Client List Filter is not used, all Client Names display.
 - If a Client List Filter is used, *Redacted* displays instead of Client Name for those Client’s which are not in the current user’s Client list.
 - The Change Healthcare interface is accessed just as before, via the Labs *Orders* form on the Client’s Timeline.
 - Use the Filters on the left-hand side to refine the displayed list of items. The options include *Order Start Date*, *Order End Date*, *Ordering Staff*, *Client*, *Enrollment Location*, *Order Number*, and *Result Status*.

- An order sent via the Change Healthcare interface displays on this screen after it is picked up by the job polling in oak.

Last Updated	Order Date	Client	Ordering Staff	Tests	Lab	Result Status
02/16/2022	02/15/2022	PARP0000 Parker, Peter	JE1 Emerson, Joe	CBC+HEMATOLOGY REVIEW		

- The *Last Updated*, *Order Date*, *Client*, *Ordering Staff*, and *Tests* columns are populated.
- When results are pending, clicking either icon in the *Result Status* column links to the *Order* page of the Lab Order Details screen.
- When Results are received and matched to an existing order,
 - The Lab column is updated with the lab name.
 - And the *Received* icon changes from grey to blue.

12/21/2021	12/21/2021	00000058 Allen, Barry	JE1 Emerson, Joe	CBC (INCLUDES DIFF/PLT)	Centu	Received
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- When the results are reviewed and acknowledged, the *Acknowledged* icon changes from grey to green.

02/15/2022	12/29/2021	PARP0000 Parker, Peter	JE1 Emerson, Joe	CBC (INCLUDES DIFF/PLT)	Century	Acknowledged
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- Clicking either icon in the *Result Status* column now links to the *Results* page of the Lab Order Details screen.



- If the results file for an ordered lab contains results for a test that was not on the initial order, *unsolicited* displays in the *Tests* column.

Last Updated	Order Date	Client	Ordering Staff	Tests	Lab	Result Status
02/16/2022	12/03/2021	8KXGJOLD Abbott, Angela	JE1 Emerson, Joe	Unsolicited - Lipid 1996 pan...	Century Hospital	

- If an unsolicited results file (results for an order not initiated by the agency) is matched to a Client, automatically by the system or manually by a user, the following columns are not populated: *Order Date*, *Ordering Staff*, and *Tests*.

Last Updated	Order Date	Client	Ordering Staff	Tests	Lab	Result Status
02/14/2022		8KXGJOLD Abbott, Angela			Century Hospital	

LAB ORDER DETAILS

Click any row on the *ORDERS & RESULTS* screen to view the Lab Order Details. This screen has two sections, *ORDER* and *RESULTS*.

The screenshot shows the 'Lab Order Details' window with a 'SEND' button in the top right. The 'ORDER' tab is active. On the left, there is a 'For Lab Use' box and a QR code. Below that, account and request numbers are shown. The main area is divided into 'Patient Information' and 'Lab Reference #' sections. The 'Patient Information' section includes name, address, DOB, sex, and guarantor. The 'Lab Reference #' section includes collection date, fasting status, and physician information. On the right, a client card displays 'PARP0000 Parker, Peter' with birth date and gender, and a 'VIEW CLIENT' link. Below the client card is an 'Internal Comments' section with a text area and 'CANCEL' and 'SAVE' buttons. A dropdown menu is open over the QR code, showing 'HTML' (checked) and 'HL7' options.

ORDER

- Use the blue icon to toggle between document types. These types may include HTML, PDF, Image, or HL7.
- Select the blue *SEND* icon to send the order to another user's inbox or to a Group Inbox. If sent to a user that does not have *Labs* menu access, they see the *You don't have access to this page* message when trying to view the order.
- To the right of the order pane, a card displays with basic Client information and a blue *VIEW CLIENT* hyperlink to easily access the full Client record.
- An *Internal Comments* section is also available which persists across users when saved. The comment may be up to 500 characters and is stored in `dbo.LabOrders.Comments`.
- Order information is only displayed for orders initiated by the agency.
- If the row selected on the *ORDERS & RESULTS* screen is for unsolicited results manually matched to a Client, the following message displays in Lab Order Details – *No order for unsolicited results*.

The screenshot shows the 'Lab Order Details' window with a 'SEND' button in the top right. The 'ORDER' tab is active. The main content area is empty except for a large grey message that says 'No order for unsolicited results' with a clipboard icon.



RESULTS

The Results section is similar in layout and function to the Order section and includes a blue *Acknowledge Results* button.

Lab Result Details SEND X

ORDER RESULTS

8001876
Echo Group Test Site Second
15 Washington St
Conway NH 03818

LABORATORY REPORT
Quest Diagnostics
QUEST DIAGNOSTICS WOOD DALE
1355 Mittel Blvd, Wood Dale IL 60191
(630) 595-3888

Patient Name: Parker, Peter

Patient ID/Hospital ID	Sex	Age	Patient Birth Date	Patient Phone Number	Physician
PARP0000	M	20	1/1/2001		EMERSON, JOE

Page	Requisition No.	Accession No.	Collection Date & Time	Log-in Date & Time	Report Date & Time	REPORT STATUS
1	62270	PEDRO0040	11/22/2021 11:30 AM	6/17/2012 11:00 AM	11/22/2021 11:30 AM	FINAL

TEST	IN RANGE	OUT OF RANGE	REFERENCE RANGE	UNITS	SITE CODE
CBC (INCLUDES DIC/PLT)					
Erythrocytes [# /volume] in Blood	4.43		4.3 to 6.2	million per milliliter	987
Hemoglobin [Mass/volume] in Blood		L 12.5	13 to 18	grams per milliliter	987
Hematocrit [Volume Fraction] oC Blood	41		40 to 52	percent	987
Leukocytes [# /volume] in Blood		HH 105600	4300 to 10800	cells per microliter	987
Platelets [# /volume] in Blood	210000		150000 to 350000	cells per microliter	987
Erythrocyte mean corpuscular volume [Entitic volume]	91		80 to 95	Centoliter	987

Internal Comments

Acknowledge Results HTML HL7 VIEW CLIENT CANCEL SAVE

- Select the blue *SEND* icon to send the results to another user's inbox or to a Group Inbox. If sent to a user that does not have *Labs* menu access, they see the *You don't have access to this page* message when trying to view the results.
- Use the blue icon to toggle between document types - HTML, PDF, or HL7.
- Select the blue *Acknowledge Results* icon to indicate that results have been reviewed and to update the Acknowledge icon on the main *ORDERS & RESULTS* screen from grey to green.
 - When selected, a green banner displays across the top of the results pane and includes the name of the user and the date the results were acknowledged.

Lab Result Details SEND X

ORDER RESULTS

✓ Acknowledged by HS1 Sherwood, Heather on 02/16/2022

- To the right of the Results pane, a card displays with basic Client information and a blue *VIEW CLIENT* hyperlink to easily access the full Client record.
- An *Internal Comments* section is also available which persists across users when saved. The comment may be up to 500 characters and is stored in `dbo.LabResults.Comments`.
- If the row selected on the *ORDERS & RESULTS* screen is pending results, an *Awaiting lab results* message displays.

Lab Result Details SEND X

ORDER RESULTS

Awaiting lab results



UNSOLICITED

The *Unsolicited* screen contains all received results that remain unmatched after being imported. Here, users can view suggested matches and assign results to a Client manually. An unsolicited result may not be acknowledged until it is manually matched to a Client and moved to the *Orders & Results* screen

Start Date	Test Date	Client	Provider	Lab
	01/27/2022	00003 Hoodwink, Robinson		Century Hospital

Buttons: FILTER, < > >> 1 of 1

- Start and End Date filters are available to limit the displayed items to a specific date or date range.
- The list items are displayed by *Test Date* in descending order.
- The Client Name and Code displayed in the list is parsed from the results file.
- Select the blue *Archive* icon to remove the result from the screen.
 - This action is also available in the *Unsolicited Lab Details* screen.
 - A confirmation box displays as once a result is archived; it is not accessible via the application.
 - Archived results remain in the database in dbo.LabResults with a Status of *ARCHIVED*.
- Click on row to view the *Unsolicited Lab Details* screen.

Unsolicited Lab Details

8001876
Echo Group Test Site Second
15 Washington St
Conway NH 03818

LABORATORY REPORT
Quest Diagnostics
QUEST DIAGNOSTICS WOOD DALE
1355 Mittel Blvd, Wood Dale IL 60191
(630) 595-3888

Patient Name: Hoodwink, Robinson

Patient ID/Hospital ID code	Sex	Age	Patient Birth Date	Patient Phone Number	Physician
	M	21	1/1/2001		Apple, Anna

Page	Requestion No.	Accession No.	Collection Date & Time	Log-in Date & Time	Report Date & Time	REPO
1	62950	PEDRO0176	1/27/2022 1:01 PM	1/27/2022 1:01 PM	1/27/2022 1:01 PM	FINA

TEST	IN RANGE	OUT OF RANGE	REFERENCE RANGE	UNITS	SI
CBC (INCLUDES DIC/C/PLT)					
Erythrocytes [# /volume] in Blood	4.43		4.3 to 6.2	million per microliter	96
Hemoglobin [Mass/volume] in Blood		L 12.5	13 to 18	grams per milliliter	96
Hematocrit [Volume Fraction] oC Blood	41		40 to 52	percent	96
Leukocytes [# /volume] in Blood		HH 105600	4300 to 10800	cells per microliter	96
Platelets [# /volume] in Blood	210000		150000 to 350000	cells per microliter	96
Erythrocyte mean corpuscular volume [Entitic volume]	91		80 to 95	Centoliter	96

first: Robinson last: Hoodwink code: 00003

SUGGESTED CLIENTS

- ROBW0000 Robinson, Will
Birth Date: 02/02/2001 (21 y.o.)
Legal Gender: Male
- 000035 Carlson, Carly
Birth Date: 09/12/1997 (24 y.o.)
Legal Gender:
- 000036 Grant, Fitzgerald
Birth Date: 09/08/1970 (51 y.o.)
Legal Gender:
- 000038 Buchanonnnnn, JimBobbobbbb

Internal Comments

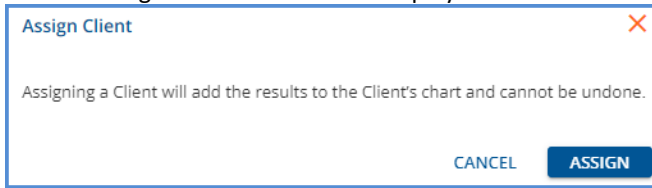
I need help identifying this Client. Is he one of ours?

CANCEL SAVE

- Select the blue *SEND* icon to send the results to another user's inbox or to a Group Inbox.
- The result details display in the left-hand pane.
- Use the blue icon to toggle between document types - HTML, PDF, or HL7.



- In the right-hand pane, a list of suggested Client matches is displayed.
 - The system performs a smart search based on the Client Name parsed from the lab results file.
 - Click into the search field and start typing to perform a Client search manually.
 - When the matching Client is found, select the card to assign the Client to the unsolicited results.
 - The following confirmation screen displays.



- After selecting **ASSIGN**, a yellow banner displays indicating that the unsolicited result was moved to the **ORDER & RESULTS** tab, and the suggested Clients list is replaced by a single card for the selected Client.



- The blue **VIEW RESULTS** in the yellow banner links to the new location for these Results on the **Lab Order Details** screen where the result can be acknowledged.
- Internal comments may be assigned to the unsolicited lab before it is assigned to a Client. This is also a 500 character max field, `dbo.LabResults.Comments`.
- If an unsolicited result is determined to be unrelated to any Client in the agency, select the blue **Archive** folder to remove it from the screen. The Status column for this record in `dbo.LabResults` is updated to **ARCHIVED**.

ERRORS

To provide more transparency and improve ease of management, errors that occur when importing orders and results are now displayed within the application.

ORDERS & RESULTS		UNSOLICITED	ERRORS
Type	Error Date	Reference ID	Error
ORDER	09/22/2021	3007623316	Error parsing HL7 document: Could not find client with client code PARP0000 while processing HL7 message for lab report with id 202109220221428006BF6E6CB11924150A28.
RESULT	06/23/2021	3007613057	Error parsing HL7 document: Could not find lab order with order number 60946 and set id 1 while processing HL7 message for lab result.
RESULT	08/05/2020	3007460424	Error parsing HL7 document: Could not find client with client code BUMA0000 while processing HL7 message for lab report with id 2020080502545432382F0AAAACAEF44028B60.

- Filters are available to search by date range and Type.
- The Reference ID column is pulled from `dbo.LabReports.ReferenceId`.
- The full error message is contained in the database.
- Use the **COPY ERROR** button for easy Error Capture when working with Echo support.
- If the Error is non-consequential or already addressed, select the blue archive folder to remove it from the screen. After confirming the archive action, the `dbo.labreports.Status` column changes from **ERROR** to **ARCHIVED**.



Reporting the CLIA# for Laboratory Services

A new 50-character, alpha-numeric field, *CLIA #*, is available on the *Billing Provider* and *Service Facility Organization* forms in *Configuration > Setup > Organizations*. This new field should be populated with a unique location code created specifically for lab services. During the 837P creation process, when a Service matches an Organization with a value in the *CLIA #* field, that value is reported in the REF*X4 segment of the Claim.

Billing Provider

Echo Behavioral Health			
Address	Type	NPI	
15 Washington St Conway, NH 03818-1234	Billing Provider	1678757422	
PROFILE			
Billing Information			
EIN	NPI	Taxonomy	CLIA Number
23-5134568	1678757422	261QM0801X	A123321Z

```
[L.2000A!L.2010AA]NM1*85*2*ECHO BEHAVIORAL
HEALTH*****XX*1678757422
[L.2000A!L.2010AA]N3*15 WASHINGTON ST
[L.2000A!L.2010AA]N4*CONWAY*NH*038181234
[L.2000A!L.2010AA]REF*EI*235134568
[L.2000B]HL*2*1*22*0
[L.2000B]SBR*P*18*987654*****CI
[L.2000B!L.2010BA]NM1*IL*1*AARDVARK*ALEX*J***M|*123456
[L.2000B!L.2010BA]N3*16 WASHINGTON ST
[L.2000B!L.2010BA]N4*CONWAY*NH*98765
[L.2000B!L.2010BA]DMG*D8*19340121*F
[L.2000B!L.2010BB]NM1*PR*2*ANTHEM BCBS SECONDARY TO
OTHER ANTHEM BCBS*****PI*111
[L.2000C!L.2300]CLM*000081-11592*50***81:B:1*Y*C*N|*P
[L.2000C!L.2300]REF*X4*A123321Z
```

Service Facility

Nordx			
Address	Type	NPI	
123 Lincoln St Unit 2 Conway, NH 03860	Service Facility	1234567891	
PROFILE			
Billing Information			
Location Number	NPI	CLIA Number	Place of Service *
987654321	1234567891	ND3345X	81 - Independent Labora... x

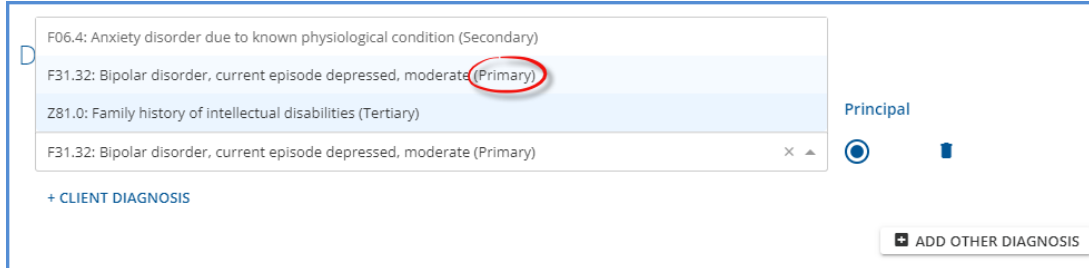
```
[L.2000C!L.2300!L.2310C]NM1*77*2*NORDX*****XX*1234567891
[L.2000C!L.2300!L.2310C]N3*123 LINCOLN ST*UNIT 2
[L.2000C!L.2300!L.2310C]N4*CONWAY*NH*03860
[L.2000C!L.2300!L.2310C]REF*LU*987654321
[L.2000C!L.2300!L.2400]LX*1
[L.2000C!L.2300!L.2400]SV1*HC:36415*50*UN*1***1
[L.2000C!L.2300!L.2400]DTP*472*D8*20220110
[L.2000C!L.2300!L.2400]REF*6R*000081-11592
[L.2000C!L.2300!L.2400]REF*X4*ND3345X
```



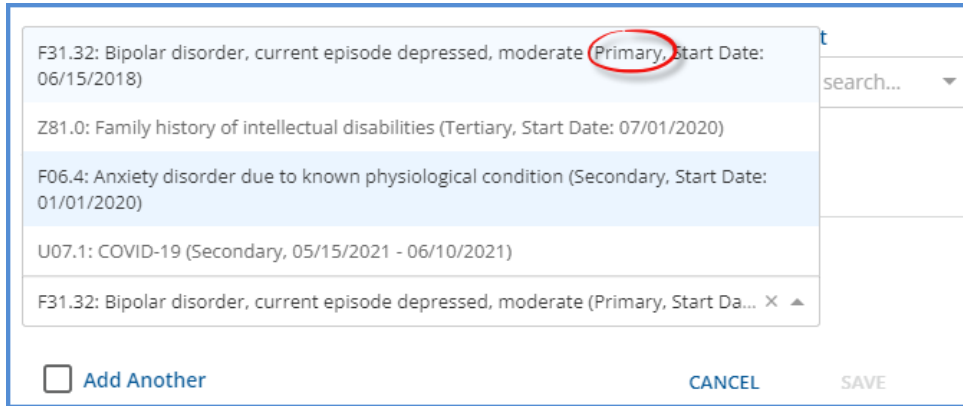

IMPROVEMENTS

Diagnosis Type Displayed in the Service Entry Screen

The Diagnosis Type (i.e., Primary, Secondary) is now displayed in the Client Diagnosis drop-down when adding or editing a Service or Per Diem template. In Service Entry, the Diagnosis Type is displayed in parentheses to the right of the Diagnosis text.



When adding or editing a Per Diem Template Client, the Diagnosis Type is displayed in parentheses just before the Diagnosis Start/End Dates.



All Recipients Displayed for Sent Messages in the Inbox

The list of messages displayed in the center column of the Sent folder under My Messages in the Inbox was updated to show the From and To recipients. Previously only the sender, listed as Me, was displayed.

<p>Before</p>	
<p>After</p>	



Client Contacts Grouped by Active and Inactive

In *Clients > Contact Info*, the Contacts listed on the left-hand side are now grouped under *Active* and *Inactive* headings, making it easy to distinguish the status of each Contact. Just as before, the orange vertical line and grey card background indicate the currently selected Contact.

Filters Persist When Navigating Batches

The filters on the *View Batch* screen no longer clear when navigating the selected Batch or between Batches. Once filter selections are made, the selections remain, even if navigating to other parts of the application, until the user logs out of the application.

REPORTS

Updated Reports

The following reports were updated.

Administration

Staff List – The *Can Order Labs* value was removed from the Staff Role column and filter option.

Billing

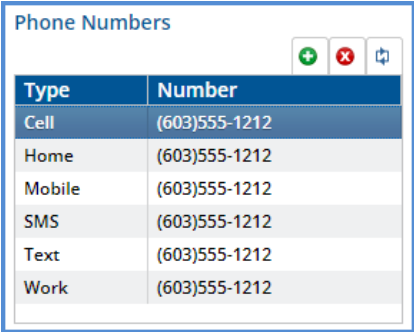
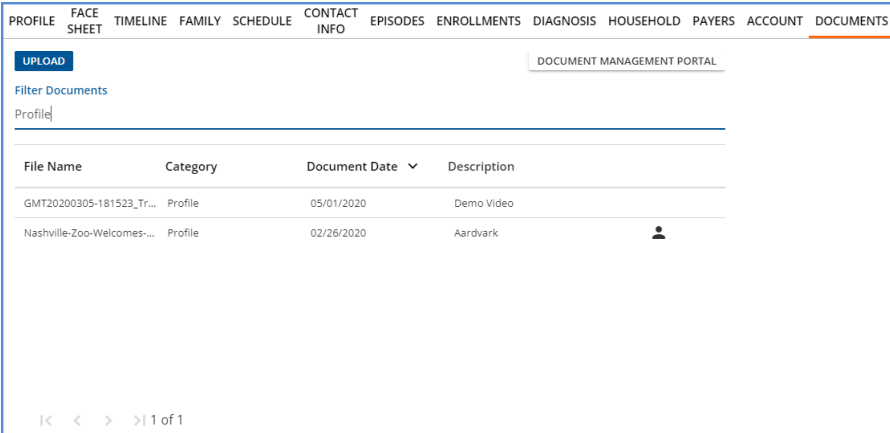
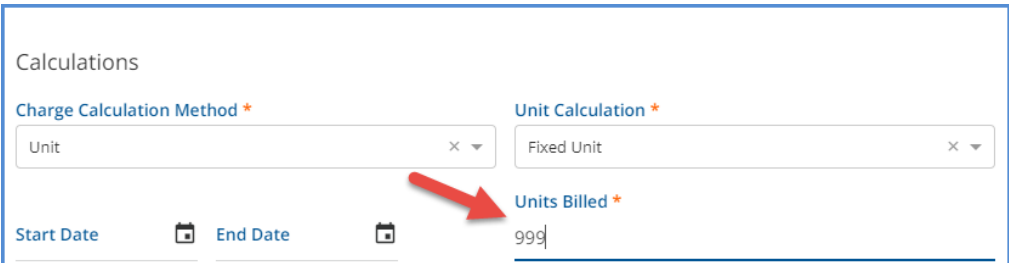
CMS1500 - The report logic for Box 6 was updated to report *Other* if the Client’s relationship to Policyholder is anything other than *Self, Spouse, Child*

_SelfPayStatement – Updated to print a Client’s or Guarantor’s full address, including City, State, and Zip, regardless if Address Line 2 is used.



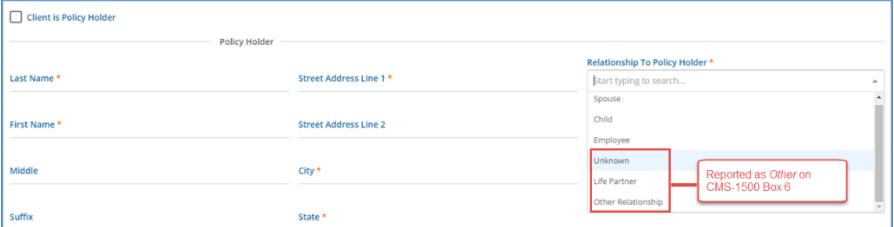
_SelfPayStatementSubReport – Updated as above.
_UB04 – Updated to include the Claim Frequency Code if available.

UPDATES

Ticket #	Description														
EV-2282	<p>The same Staff phone number can now be saved multiple times using different types in <i>Configuration > Staff/Users > Staff > Communications</i>.</p>  <table border="1" data-bbox="250 558 641 800"> <thead> <tr> <th>Type</th> <th>Number</th> </tr> </thead> <tbody> <tr> <td>Cell</td> <td>(603)555-1212</td> </tr> <tr> <td>Home</td> <td>(603)555-1212</td> </tr> <tr> <td>Mobile</td> <td>(603)555-1212</td> </tr> <tr> <td>SMS</td> <td>(603)555-1212</td> </tr> <tr> <td>Text</td> <td>(603)555-1212</td> </tr> <tr> <td>Work</td> <td>(603)555-1212</td> </tr> </tbody> </table>	Type	Number	Cell	(603)555-1212	Home	(603)555-1212	Mobile	(603)555-1212	SMS	(603)555-1212	Text	(603)555-1212	Work	(603)555-1212
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EV-2606	<p>The <i>BALANCE ZEROING CREDIT</i> option was removed from the <i>Transaction Type</i> drop-down list in Remittances and Remittances Batches. This option is a system transaction definition and not needed in manual Remittance entry.</p>														
EV-2615	<p>The <i>Fiscal Overview > Unprocessed Remittances > History</i> screen was reviewed and updated to improved loading speeds. This screen now loads in a few seconds or less, even with a large volume of records.</p>														
EV-2679	<p>The <i>Clients > Documents</i> page was paginated to improve the loading speed when there are many files for a single Client. In addition, Client documents can now be filtered by <i>Document Category</i>, and the list of documents can be searched by <i>Document Category</i>, <i>File Name</i>, or <i>Description</i>. Note that this search is case sensitive.</p> 														
EV-2752	<p>The constraint on billable units in the <i>dbo.ChargeStrategies</i> was updated to allow up to 999. Previously this column had a maximum value of 99. Now in <i>Configuration > Services/Payers > Service Definitions or Payers > Rates</i>, when the <i>Unit Calculation</i> selection is Fixed Unit, up to 3-digits can be entered in the Units Billed field.</p> 														



BUG FIXES

Ticket #	Case #	Description
EV-2466		The Errors count on <i>Vantage Point > Unbilled Charges > History</i> now matches the count of Errors on the Vantage Point and the <i>Unbilled Charges > Errors</i> tab.
EV-2645		An issue was addressed where multiple Copay Charges were created when Charges were created for a Service with an Addon Service. This issue was addressed and now when Charges are created for a Service with an associated Addon Service, only a single Copay Charge is created.
EV-2656		An issue was addressed where the Telemed place holder spun endlessly in the Events screen when a redacted Client's Event was opened with a Client List Filter enabled. If another Client's non-Telemed Event was opened, the Telemed was still present, stuck in a loading state. The issue with the sticky Telemed place holder was addressed and now only appears on Telemed Events, even with a Client List Filter in place. In addition, a user with a Client List Filter enabled can no longer open a single-Client Event for a redacted Client.
EV-2682	9360	<p>An issue was reported where the <i>Unbilled Charges > Create Bills</i> job failed for the CMS-1500 if the Client's relationship to the Policy Holder was defined as <i>Unknown</i> in <i>Clients > Payers</i>.</p>  <p>The logic for Box 6 was updated to report <i>Other</i> if the Client's relationship to Policyholder is anything other than <i>Self, Spouse, Child</i>.</p>
EV-2742		The Form DesignEHR File Link button was updated to use the agency path (WEB-INF\Files\ <agency-code>) a="" file.<="" loading="" td="" when=""> </agency-code>)>
EV-2745	9930	An issue was reported where the Waterfall was adding a contractual adjustment for multiple Payers instead of only the prior Payer. The issue has been addressed, and now only the contractual adjustment from the prior Payer is included in the Waterfall.
EV-2753	10297	An issue was reported where the 271 Import job failed for a specific Payer. The cause was due to the Payer using a repetition separator that was not a carat (^). The import process was updated to determine what the sender is using for a repetition separator from the ISA segment, and then using that separator when parsing the EB segments. In addition, a change was made to allow EB03 to be null.
EV-2775	10305	An issue was reported where selecting a Team with a terminated Staff member still displayed the terminated Staff in the dropdown and on the Scheduler. This issue has been address and terminated Staff are no longer visible on the Scheduler, even a Team is selected in Compare view.
EV-2776	10305	An issue was reported with Events when a Team with a terminated Staff was assigned as Ancillary Staff to an Event. A blank Ancillary Staff record was created for the terminated Staff. The issue was addressed and now if a Team contains a terminated Staff Member, as of the Event Date, that Staff is not added as Ancillary Staff.
EV-2789	THOM	When searching for any item in the system, such as Client, Staff, Service Definition, Payer, etc., the displayed matches did not always make sense because they were the result of matches on the ID from the URL in addition to the (Client/ Staff/ Payer) Name. The search was updated system wide and now only returns matches on Name.
EV-2810	10158	<p>An issue was reported with the date range included in the 270 Eligibility file created for Scheduled Events. Under certain circumstances, the reported End Date was before the Start Date. The issue has been addressed with the following changes:</p> <ul style="list-style-type: none"> In cases where a fallback default End Date is needed, the Start Date is now used as the default End Date. This ensures that the End Date reported is not before the Start Date.



		<ul style="list-style-type: none">• When the Start Date and End Date are the same date, the date segment in the file was updated to report <code>DTP*291*D8*20220214</code>.• When the dates are not the same, the date segment still includes the range <code>DTP*291*RD8*20220214-20220219</code>.
EV-2816	1000	An issue was reported where the Self Pay Report was missing the City, State and Zip Code when there was no value for Address Line 2. The report was updated to print the Client's (or Guarantor's) full address, even if Address Line 2 is not used.
EV-2909	7668	An issue was reported where the 835-import job failed if the Claim ID (Claim Control Number within CLP01 and REF*6R) contained alpha characters. (Claim IDs generated by EchoVantage are integers only.) The import process was updated to handle alpha characters in the Claim ID and now completes successfully. If an imported payment has alpha characters in the Claim ID but the Service, Date, and Client Name match on a Charge, the resulting Remittance is in <i>Ready</i> status. If a matching Charge is not found, the resulting Remittance is in <i>Not Ready</i> status.