



ECHOVANTAGE RELEASE NOTES

VERSION 3.36

NEW FEATURES

Requesting Voids

When a payment is received for a charge by mistake or any other reason, billing users can now request the Payer take the payment back using the new *REQUEST VOID* feature. The following conditions must be met for this feature to work.

- The Payer is configured to accept voided claims.
 - A new configuration option is available on the 837P Billing Method only.

Configuration options for 837P Billing Method:

- Report Staff (Loop 2310B)
 - Defined Filter: Start typing to search...
- Report Staff Taxonomy (Loop 2310B, PRV)
- Report Service Facility Location (Loop 2310C)
- Provider Signature on File (CLM06)
- Report Referring Provider (Loop 2310A)
- Provider Accepts Assignment (CLM07)
- Assignment of Benefits Indicator (CLM08)
- Payer Accepts Corrected Claims
- Payer Accepts Voided Claims

Buttons: CANCEL, SAVE

- The PCCN field on the Remittance for the Void Request is not blank.
- The Remittance amount is greater than zero.
- The Remittance Status is *Done*.
- A Void has not already been requested for the selected Remittance.

Easily locate the Remittance to review and request a void using the new link to Remittances from the Claims Detail screen, as Claims Management provides the ability to search for a specific Client and Date of Service. A link is available for any Transaction code of 'P' Payer Payment.

Claim Details

Beach, Sandy, Jr. (000041)
 Birth Date: 10/17/1965
 SSN: 001-23-4567
 Phone: (603)731-1813
 Address: 1729 Village Rd, Silver Lake, NH 03875

Name	Policy Number	Priority	Notes
BCBSNH	YGG00M62791	1	
MDCD	P123	2	
SELF		99	

04/09/2022 90837 Alcohol and Drug Program Show Reprocessed Charges

Transaction Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
04/09/2022	\$ 200.00	CHARGE CREATED	04/12/2022		DONE	90837	F10.950
04/11/2022	\$ 200.00	PAYER PAYMENT					
Total Balance:	\$ 0.00						

Billing History: BCBSNH 04/12/2022



When the required conditions are met, a **REQUEST VOID** button is available at the bottom of the *Batches > Edit Row* screen.

Transaction Date 04/11/2022 **Batch ID** BEA0409 **Default Payer** BCBSNH **Remittance Date** 04/11/2022 **RA Number** BEA0409 **Check Amount** \$ 200.00

Client 000041 Beach, Sandy, Jr.

Payer Start typing to search...

Filter by Service Date

ACTIVE OR OUTGOING

- 03/10/2022 90806 Counseling HS123 Sherwood, Heather \$ 36.30 SELF
- 08/04/2021 90806 Counseling JS123 Staffer, Joe \$ 150.00 MDCC
- 06/01/2021 99292 Psychotherapy 15-30 minutes CM123 Mores, Chani \$ 1,000.00 MDCC
- 03/05/2021 T1016 Case Management HS123 Sherwood, Heather \$ 300.00 MDCC

BCBSNH

Transaction Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
04/09/2022	\$ 200.00	CHARGE CREATED	04/12/2022		DONE	90837	F10.950
04/11/2022	\$ 200.00	PAYER PAYMENT					
Total Balance:		\$ 0.00					

Remittances

Allowed Amount Contractual Adjustment

Payment * \$ 200.00

PCCN 040901

Waterfall to Next Payer

Status Done

+ SAVE AND ADD ANOTHER DELETED **REQUEST VOID** CANCEL SAVE

Or a *Request Void* button is available from the *Original Remittances* screen, depending on where the Remittance was posted.

BATCHES **REMITTANCES**

000041 Beach, Sandy, Jr. Service Date: 04/10/2022 \$ 200.00 BCBSNH **VIEW CLAIM**

Remittance Details

Transaction Type * PAYER PAYMENT Transaction Date * 04/12/2022

Remittance Amount * \$ 200.00 Remittance Date 04/12/2022 RA Number BEA0410

PCCN 041002 Batch ID BEA0410

Allowed Amount Patient Responsibility Waterfall to next payer

Client & Service

Payer * BCBSNH - Anthem BCBS of NH Client 000041 Beach, Sandy, Jr. Service Date 04/10/2022

Alcohol and Drug Program 90837 04/10/2022 Staff HS123 Sherwood, Heather Amount \$ 200.00 Balance \$ 0.00 DONE **VIEW CLAIM**

0 Messages & Notes Status * Done

+ SAVE AND ADD ANOTHER DELETED **REQUEST VOID** CANCEL SAVE

If any of the conditions are not met, the **REQUEST VOID** button is disabled, and the help icon to the right provides an explanation.

+ ADD TRANSACTION

Waterfall to Next Payer

Unable to Request Void for remittance because:

- Payer does not accept Void Requests
- Payment is not greater than \$0

Status Done

+ SAVE AND ADD ANOTHER DELETED **REQUEST VOID** CANCEL SAVE



Click on **REQUEST VOID** to create the void request. The Remittance Status is updated to *Void Requested* (a new Remittance Status), the *Request Void* button no longer displays, and a yellow banner displays across the top of the Edit Row page indicating that a void has been requested. If the void request was created in error, use the blue *Cancel Request* button to reverse the request and return the Remittance to a *DONE* Status.

Edit Row

Transaction Date: 04/11/2022 | Batch ID: BEA0409 | Default Payer: BCBSNH | Remittance Date: 04/11/2022 | RA Number: BEA0409 | Check Amount: \$ 200.00 | Payments: \$ 200.00 | Adjustments: \$ 0.00 | Patient Responsibility: \$ 0.00

Client: 000041 Beach, Sandy, Jr.

Remittance Summary: Beach, Sandy, Jr. 04/09/2022 90837 Alcohol and Drug Program

Name	Policy Num...	Priority	Notes
BCBSNH	YGG00M62791	1	
MDCD	P123	2	
SELF		99	

BCBSNH

Transaction Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
04/09/2022	\$ 200.00	CHARGE CREATED	04/12/2022		DONE	90837	F10.950
04/11/2022	\$ 200.00	PAYER PAYMENT					
Total Balance:		\$ 0.00					

Remittances

Allowed Amount	Contractual Adjustment
\$ 200.00	
Payment *	Patient Responsibility
\$ 200.00	
PCCN	
040901	

Status: Void Requested

A similar yellow banner displays on the original Remittances screen to indicate that a void has already been requested, the Status is updated to *Void Requested*, and the *Request Void* button is suppressed. The blue *CANCEL REQUEST* button is also available.

BATCHES REMITTANCES

000041 Beach, Sandy, Jr. | Service Date: 04/10/2022 | \$ 200.00 | BCBSNH

Remittance Details

Transaction Type: PAYER PAYMENT | Transaction Date: 04/12/2022

Remittance Amount: \$ 200.00 | Remittance Date: 04/12/2022 | RA Number: BEA0410

PCCN: 041002 | Batch ID: BEA0410

Allowed Amount: | Patient Responsibility: | Waterfall to next payer

Client & Service

Payer: BCBSNH - Anthem BCBS of NH | Client: 000041 Beach, Sandy, Jr. | Service Date: 04/10/2022

Alcohol and Drug Program 90837 04/10/2022

Status: Void Requested



The Remittance Status is updated on the Claim Details page after a void is requested.

Claim Details ✕

Cliff, Rocky (000104)
 Birth Date: 04/12/1990
 SSN: 111-11-1111
 Address:
 1600 Washington St
 Conway, NH 03818

Name	Policy Number	Priority	Notes
BCBSNH	YGG0087653	27	
MH	104867-001	45	
SELF		99	

04/10/2022 90837 Alcohol and Drug Program Show Reprocessed Charges

Transaction Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
04/10/2022	\$ 200.00	CHARGE CREATED	04/12/2022		DONE	90837	F06.31
04/12/2022	\$ 200.00	PAYER PAYMENT			VOID REQUE...		
Total Balance:		\$ 0.00					

Charges associated with a Remittance in *Void Request* status are eligible for inclusion in an 837P billing job from the *Fiscal Overview > Unbilled Charges > Create* screen even though the Charge Status is still *DONE*. A new required filter option, *Claims to Include*, was added to easily manage the inclusion or exclusion of void requests. Use this option to filter by *Active Charges Only*, *Void Requests Only*, or *All*.

Unbilled Charges > Create Bills ✕

CREATE HISTORY ERRORS

Start typing to search...

Billing Method *
837P

Payer *
BCBSNH - Anthem BCBS of NH

Start Date End Date

Client
Select Client...

Staff
Select Staff...

Supervisor
Select Supervisor...

Defined Filter
Select Defined Filter...

Claims to Include *
Void Requests Only

Payer	Service Date	Status	Client	Staff	Service Code	Amount	Procedure Code
<input type="checkbox"/>	BCBSNH - Anthem BC...	04/10/2022	Void Request	000041 Beach, Sandy...	HS123 Sherwood, He...	ADP	\$ 200.00 90837
<input type="checkbox"/>	BCBSNH - Anthem BC...	04/09/2022	Void Request	000041 Beach, Sandy...	HS123 Sherwood, He...	ADP	\$ 200.00 90837

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Message
Anthem Void Requests

SEARCH CREATE JOB WITH RESULTS



If you use *Saved Filters* on the *Unbilled Charges > Create Bills* screen, these should be updated with the appropriate *Claims to Include* value. Although the application defaults to *All*, selecting a saved filter clears this default. If the saved filter does not have a *Claims to Include* value, you will need to manually select one before searching.



When a Charge associated with a Remittance in *Void Request* status is included in the Create Bills job,

```

[L.2000B!L.2010BA]NM1*IL*1*BEACH*SANDY***JR.*MI*YGG00M62791
[L.2000B!L.2010BA]N3*1729 VILLAGE RD
[L.2000B!L.2010BA]N4*SILVER LAKE*NH*03875
[L.2000B!L.2010BA]DMG*D8*19651017*M
[L.2000B!L.2010BB]NM1*PR*2*ANTHEM BCBS OF NH*****PI*ANTHEM
[L.2000C!L.2300]CLM*000041-6479*200***15:B:8*Y*C*N*I*P
[L.2000C!L.2300]REF*F8*040901
[L.2000C!L.2300]HI*ABK:F10950
[L.2000C!L.2300!L.2310B]NM1*82*1*SHERWOOD*
HEATHER***XX*0004191971
[L.2000C!L.2300!L.2310B]PRV*PE*PXC*78789999
[L.2000C!L.2300!L.2320]SBR*S*18*G123*****MC
[L.2000C!L.2300!L.2320]OI***Y*P**I

```

- The Claim Frequency Code is reported as “8” in the CLM05-3 segment (15:B:8).
- The PCCN from the associated Remittance, **040901**, is reported in the REF*F8 segment. This is the same PCCN entered for the 04/09/22 Service on the Batches Remittance above.
- The payment amount is not reported.

When the Create Bills job is finalized, the Charge Status is updated from *Done* to *Outgoing*, and the Remittance Status is updated from *Void Requested* to *Void Sent*, a second new Remittance Status. Once a Remittance is updated to *Void Sent* Status, the request can no longer be canceled.

Claim Details ✕

Beach, Sandy, Jr. (000041)

Birth Date: 10/17/1965
 SSN: 001-23-4567
 Phone: (603)731-1813
 Address:
 1729 Village Rd
 Silver Lake, NH 03875

04/09/2022 90837 Alcohol and Drug Program Show Reprocessed Charges

Name	Policy Number	Priority	Notes
BCBSNH	YGG00M62791	1	
MDCD	P123	2	
SELF		99	

BCBSNH							NOTES & TASKS
Transaction Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
04/09/2022	\$ 200.00	CHARGE CREATED	04/12/2022		OUTGOING	90837	F10.950
04/11/2022	\$ 200.00	PAYER PAYMENT			VOID SENT		
Total Balance:		\$ 0.00					

Billing History

BCBSNH 04/12/2022
 BCBSNH 04/12/2022



Requesting a Void and Unapplied Payments

A void can also be requested and sent for a Remittance associated with an Unapplied Payment, whether applied or unapplied, provided the conditions stated in the beginning of this section are met. The method chosen depends on your agency's workflow. Take the two Overpayments below for example. **A link to the Remittance from the Unapplied Payment in both the Unapplied Card and the Claim Details is planned for a future release.**

Unapplied Payments
✕

WITH CHARGES
WITHOUT CHARGES

Transaction Start Date
04/13/2022

Transaction End Date

Payer
Start typing to search...

Batch ID

Client
Start typing to search...

Show
All

FILTER

TAKEBACKS (0)
OVERPAYMENTS (2)
OTHER (0)

No items selected

000104 Cliff, Rocky
Alcohol and Drug Program 90837
BCBSNH

Date	Amount	Reason
04/14/2022	\$ 150.00	PAYER PAYMENT

MARK AS DONE VIEW CLAIM

000041 Beach, Sandy, Jr.
Alcohol and Drug Program 90837
BCBSNH

Date	Amount	Reason
04/14/2022	\$ 150.00	PAYER PAYMENT

MARK AS DONE VIEW CLAIM

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Action

APPLY

Requesting a Void for an "unapplied" Unapplied Payment

Requesting and sending the void for the Remittance associated with an Unapplied Payment is the same with one exception. There is no indication of either status, *Void Requested* or *Void Sent*, on the Claim Details or Unapplied Payments screen. The void is sent in the example below.

Claim Details
✕

Beach, Sandy, Jr. (000041)

Birth Date: 10/17/1965
SSN: 001-23-4567
Phone: (603)447-1234
Address:
1729 Village Rd
Silver Lake, NH 03875

04/13/2022 90837 Alcohol and Drug Program

Name	Policy Number	Priority	Notes
BCBSNH	YGG00M62791	1	
MDCD	P123	2	
SELF		99	

Show Reprocessed Charges

BCBSNH NOTES & TASKS

Unapplied Payments

Date	Amount	Reason
04/14/2022	\$ 150.00	PAYER PAYMENT

Transaction Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
04/13/2022	\$ 200.00	CHARGE CREATED	04/13/2022		DONE	90837	F10.950
04/13/2022	\$ 200.00	PAYER PAYMENT					
Total Balance:	\$ 0.00						

Billing History

BCBSNH 04/13/2022

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- **Displaying the status of the Unapplied Remittance is planned for a future release.**
- This method has the benefit of minimizing the information that flows to the general ledger as both the Overpayment and subsequent Takeback are captured in the Unapplied Default account only.
- When a Reversal of Prior Payment is received, both the Overpayment and Takeback are moved to the *OTHER Unapplied Payments* tab as both are associated with the same charge.

Unapplied Payments

WITH CHARGES | WITHOUT CHARGES

Transaction Start Date: 04/14/2022

Transaction End Date: [Calendar Icon]

Payer: Start typing to search...

Batch ID: [Field]

TAKEBACKS (0) | OVERPAYMENTS (1) | **OTHER (1)**

000041 Beach, Sandy, Jr.
Alcohol and Drug Program 90837

BCBSNH

MARK AS DONE | VIEW CLAIM

Date	Amount	Reason
04/14/2022	-\$ 150.00	REVERSAL OF PRIOR PAYMENT
04/14/2022	\$ 150.00	PAYER PAYMENT

- After marking this Other type Unapplied Payment as *DONE*, the Claim Details screen continues to show both the Overpayment and Takeback associated with the Charge; the information passed on to the General Ledger is minimal.

Claim Details

Beach, Sandy, Jr. (000041)

Birth Date: 10/17/1965
SSN: 001-23-4567
Phone: (603)447-1234
Address: 1729 Village Rd, Silver Lake, NH 03875

04/13/2022 90837 Alcohol and Drug Program

Name	Policy Number	Priority	Notes
BCBSNH	YGG00M62791	1	
MDCD	P123	2	
SELF		99	

Show Reprocessed Charges:

BCBSNH | NOTES & TASKS

Unapplied Payments

Date	Amount	Reason
04/14/2022	-\$ 150.00	REVERSAL OF PRIOR PAYMENT
04/14/2022	\$ 150.00	PAYER PAYMENT

Transaction Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
04/13/2022	\$ 200.00	CHARGE CREATED	04/13/2022		DONE	90837	F10.950
04/13/2022	\$ 200.00	PAYER PAYMENT					

Total Balance: \$ 0.00

Requesting a Void for an "applied" Unapplied Payment

The Remittance link is available in Claim Details and the Status is updated when a void is requested or sent.

Claim Details

Cliff, Rocky (000104)

Birth Date: 04/12/1990
SSN: 111-11-1111
Address: 1600 Washington St, Conway, NH 03818

04/13/2022 90837 Alcohol and Drug Program

Name	Policy Number	Priority	Notes
BCBSNH	PN	27	

Show Reprocessed Charges:

BCBSNH | NOTES & TASKS

Transaction Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
04/13/2022	\$ 200.00	CHARGE CREATED	04/13/2022		OUTGOING	90837	F06.31
04/13/2022	\$ 200.00	PAYER PAYMENT					
04/14/2022	\$ 150.00	PAYER PAYMENT			VOID SENT		
04/14/2022	-\$ 150.00	CHARGE INCREASING CREDIT					

Total Balance: \$ 0.00

Billing History

BCBSNH 04/13/2022
BCBSNH 04/13/2022



- If a Reversal of Prior Payment is received, a Takeback is created and must be applied (Apply Payment Reversal action).

- The Claim Details screen lists Payer Payments for both the Overpayment and Reversal of Prior Payment and a Charge Increasing Credit and reversal of the Charge Increasing Credit.

- General Ledger Entries, including moving into and out of the *Unapplied Default* account, are created for the transactions associated with applying each Unapplied Payment.

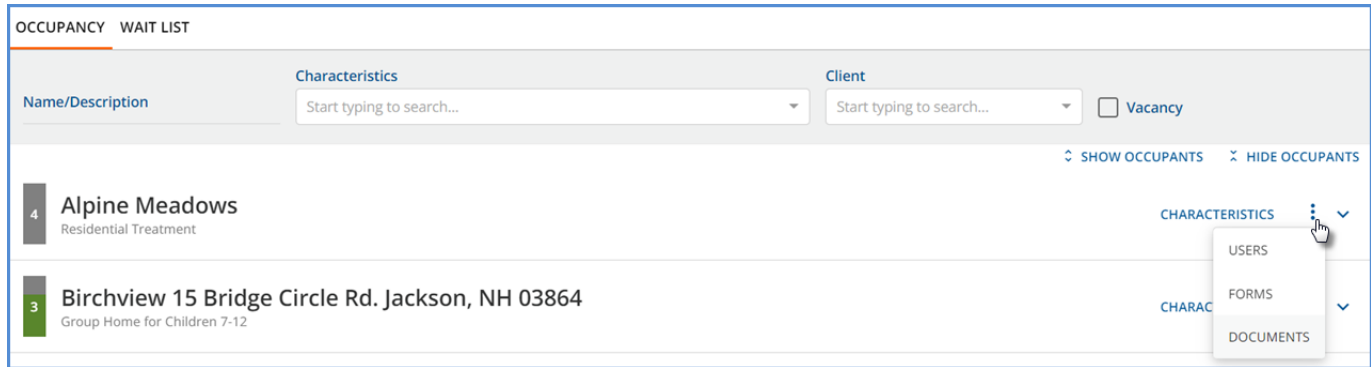
Reprocessing and the Void Requested Status

If at any point it is determined that a Charge must be reprocessed, and that Charge is associated with a Remittance in *Void Requested* Status, the void request must be canceled before reprocessing. Once reprocessing is complete and the reprocessed Remittance is associated with the new Charge, a void can again be requested if needed.

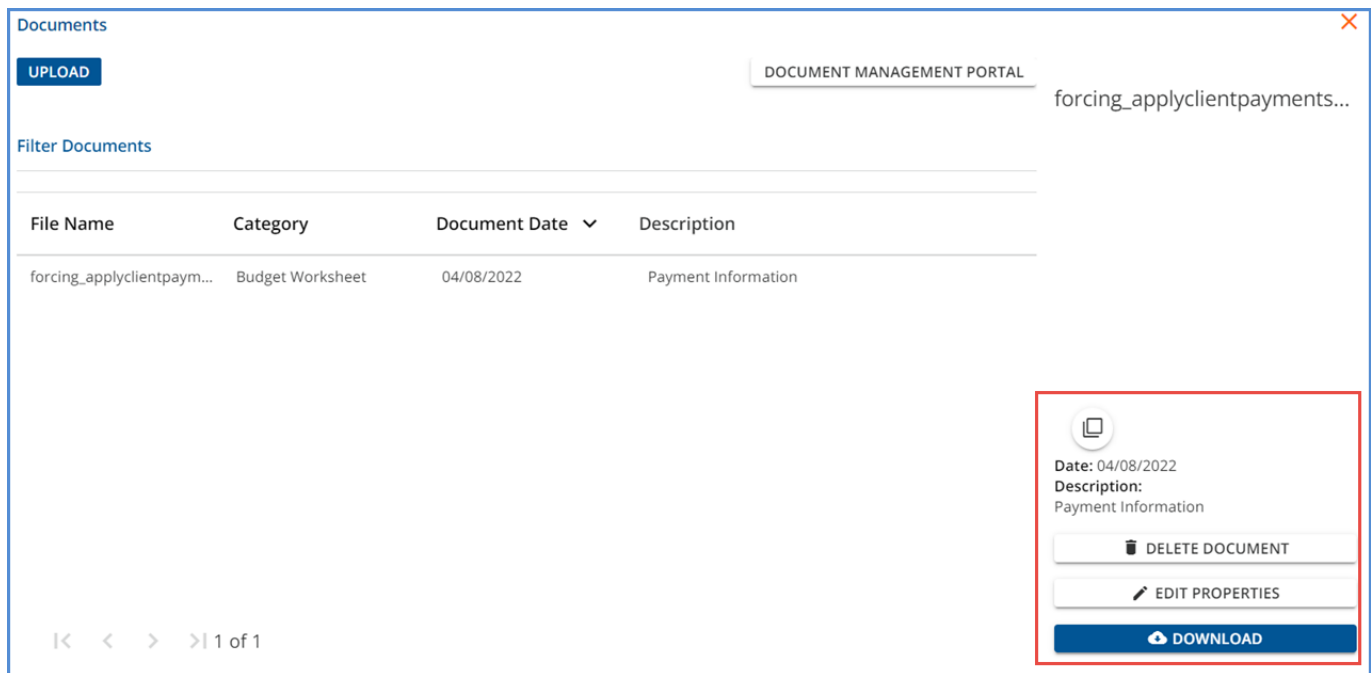


Documents for Placements

Users can now add and manage Documents for Spaces in Placements. Access to *Users*, *Forms*, and *Documents* within Placements were added to an overflow menu to accommodate the changes needed for Documents. Select the ellipsis (three dots) to open the overflow menu.



Then select *DOCUMENTS* to open the document management modal.



- The modal displays the documents specific to the selected space only.
- User Group members with access to Placements have access to the Documents modal; the Document Category permissions still apply just as they do in *Client* or *Family* Documents.
- New documents can be uploaded, or existing ones may be edited, deleted, or downloaded. However, there is no option to set a profile picture.
- If a Space is renamed, a new folder is created in Alfresco but it is associated with the same owner ID, allowing documents from both folders to display for the newly renamed Space.
- The application associates a document with a Space via an owner ID in Alfresco.
 - The Owner Id identifies the Space which has a Name and Description.
 - The Folder is stored with the Name.



Documents for Staff

The ability to associate documents with Staff is also available in this release. A new *DOCUMENTS* tab was added in *Configuration > Staff/Users > Staff*.

- User Group members with access to the Staff menu option in *Configuration* have access to the new Documents tab.
- The Document Category permissions still apply just as they do in *Client* or *Family* Documents.
- New staff documents can be uploaded, or existing ones may be edited, deleted, or downloaded.
- Just like Documents in Placements, there is no option to set a profile picture.

IMPROVEMENTS

Remittances with *Waterfall to Next Payer* Set to False

Processing Remittances with the *Waterfall to Next Payer* set to false (unchecked) no longer sets the Charge back to Active after the transactions are finalized. A new Charge status, *Working*, is assigned which allows the billing users control over when those Charge balances are rebilled to the same Payer or Waterfalled to a subsequent Payer.

For example, a Client has three Charges with a Status of *Outgoing*.

BEAS0000 Beach, Sandy										Payer Balance: \$ 311.30	Client Balance: \$ 10.00
<input type="checkbox"/>	Date	Service	Staff	Active/Last Pa...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
<input type="checkbox"/>	03/10/2022	COUN	HS123	CC01	Outgoing	Charge Created	04/08/2022	\$ 75.00	\$ 0.00	\$ 56.30	\$ 0.00
<input type="checkbox"/>	01/12/2022	CASE	HS123	CC01	Outgoing	Charge Created	04/08/2022	\$ 75.00	\$ 0.00	\$ 65.00	\$ 0.00
<input type="checkbox"/>	12/15/2021	CRI	HS123	CC01	Outgoing	Charge Created	04/08/2022	\$ 200.00	\$ 0.00	\$ 190.00	\$ 10.00

Payer CC01 remits a total of \$200.00 for all three Charges. The Remittances are entered and the *Waterfall to Next Payer* checkbox is NOT selected.



Client: BEAS0000 Beach, Sandy S

Payer: Start typing to search...

Filter by Service Date

ACTIVE OR OUTGOING

- 03/10/2022
90806 Counseling
HS123 Sherwood, Heather
\$ 75.00 CC01
- 01/12/2022
T1016 Case Management
HS123 Sherwood, Heather
\$ 75.00 CC01

Transaction Date	Amount	Reason	Last Billed	Authorization	Status	Procedure Code	Diagnosis
03/10/2022	\$ 75.00	CHARGE CREATED	04/08/2022		OUTGOI...	90806	F32.2
	\$ 10.00	COPAY ADJ					
	\$ 8.70	CONTRACT ADJ					
Balance:		\$ 56.30					
Total Balance:		\$ 56.30					

Remittances

Allowed Amount Contractual Adjustment

Payment * \$ 25.00 Patient Responsibility

Waterfall to Next Payer

Status: Not Ready

+ SAVE AND ADD ANOTHER DELETE CANCEL SAVE

The Remittances are processed AND finalized. The Payer Balance is updated, and the Status for each Charge is now Working.

CLAIMS MANAGEMENT REPROCESSING HISTORY REPROCESSING ERRORS

Client: Start typing to search... Staff: Start typing to search... Service Start: Service End: Billing Start: Billing End:

Payer: Start typing to search... Payer Category: Start typing to search... Defined Filter: Start typing to search... Charge Status: Working

BEAS0000 Beach, Sandy Payer Balance: \$ 111.30 Client Balance: \$ 10.00

Date	Service	Staff	Active/Last Pa...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
<input type="checkbox"/> 03/10/2022	COUN	HS123	CC01	Working	Charge Created	04/08/2022	\$ 75.00	\$ 25.00	\$ 31.30	\$ 0.00
<input type="checkbox"/> 01/12/2022	CASE	HS123	CC01	Working	Charge Created	04/08/2022	\$ 75.00	\$ 45.00	\$ 20.00	\$ 0.00
<input type="checkbox"/> 12/15/2021	CRI	HS123	CC01	Working	Charge Created	04/08/2022	\$ 200.00	\$ 130.00	\$ 60.00	\$ 10.00

When it is time to bill or enter a Payment against the Charge in Working status, include it in a Rebill Outgoing, Working, and Denied Charges reprocessing job to update the status to Active. Unlike denied Charges, a Remittance must be taken out of Working status before a payment can be entered.

BEAS0000 Beach, Sandy Payer Balance: \$ 111.30 Client Balance: \$ 10.00

Date	Service	Staff	Active/Last Pa...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
<input checked="" type="checkbox"/> 03/10/2022	COUN	HS123	CC01	Working	Charge Created	04/08/2022	\$ 75.00	\$ 25.00	\$ 31.30	\$ 0.00
<input type="checkbox"/> 01/12/2022	CASE	HS123	CC01	Working	Charge Created	04/08/2022	\$ 75.00	\$ 45.00	\$ 20.00	\$ 0.00
<input type="checkbox"/> 12/15/2021	CRI	HS123	CC01	Working	Charge Created	04/08/2022	\$ 200.00	\$ 130.00	\$ 60.00	\$ 10.00

Selected Payer Balance: \$ 31.30 Selected Client Balance: \$ 0.00

Action * Rebill Outgoing, Working, and Denied C... Transaction Date: 04/07/2022 CONTINUE WITH SELECTION

After the Rebill job is confirmed and completed, the Charge Status is updated to Active, making it eligible for inclusion in a new Unbilled Charges > Create Bills job or for selection in Remittance processing.



BEAS0000 Beach, Sandy										Payer Balance: \$ 111.30 Client Balance: \$ 10.00	
<input type="checkbox"/>	Date	Service	Staff	Active/Last Pa...	Charge Status	Service Status	Last Billed	Charge	Paid	Payer Balance	Client Balance
<input type="checkbox"/>	03/10/2022	COUN	HS123	CC01	Active	Charge Created	04/08/2022	\$ 75.00	\$ 25.00	\$ 31.30	\$ 0.00
<input type="checkbox"/>	01/12/2022	CASE	HS123	CC01	Working	Charge Created	04/08/2022	\$ 75.00	\$ 45.00	\$ 20.00	\$ 0.00
<input type="checkbox"/>	12/15/2021	CRI	HS123	CC01	Working	Charge Created	04/08/2022	\$ 200.00	\$ 130.00	\$ 60.00	\$ 10.00

The new *Working* status is searchable in Claims Management and is an available selection in the *Outstanding Charges* report.



Agency created custom Alerts and Reports that filter or reference Charges by status should be reviewed and updated, if necessary, to include this new status.

Grouping Results by Lab Order

Imported Lab Results are now grouped by Lab Order, condensing multiple results for tests ordered at the same time into a single row on the *ORDERS & RESULTS* or *UNSOLICITED* pages. A new database table, *CommonLabOrders*, was added to store the top-level grouping from the ORC segment in the hl7, allowing all the results with the same order number to be treated as a group.



CommonLabOrders also stores information for matching unsolicited lab results to a Client replacing *UnsolicitedLabData*.

Existing lab orders and results are grouped by the upgrade process.

- If multiple comments exist for the same order, the comments are concatenated during the upgrade process.
- If any single result associated with an order is acknowledged, then all results in the group are considered acknowledged after the upgrade is complete.
- If during the upgrade there are multiple *Unsolicited* results for different orders but the same Client, a row for each displays on the *ORDERS & RESULTS* screen, if successfully matched by the application.
 - Order Date, Ordering Staff, and Tests are not displayed on this screen because they were unsolicited results.
 - These may look like duplicates because the *Last Update* date and *Client* codes are the same but viewing the detail in each row shows that each is for a test ordered on different days.

Last Updated	Order Date	Client	Ordering Staff	Tests	Lab	Result Status
04/06/2022					ACCU REFERENCE MEDICAL ...	
04/06/2022					ACCU REFERENCE MEDICAL ...	
04/06/2022					ACCU REFERENCE MEDICAL ...	
04/06/2022					ACCU REFERENCE MEDICAL ...	
04/06/2022					ACCU REFERENCE MEDICAL ...	
04/06/2022					ACCU REFERENCE MEDICAL ...	
04/06/2022					ACCU REFERENCE MEDICAL ...	
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- No changes to how the results display on the Timeline were made – each result still displays individually. Multiple results on the same day/order display the count.



New appId Available from Form DesignEHR Form Connection

The appId is now an accessible value for Form DesignEHR validation and from a stored procedure called from a form.

- Use `SESSION_CONTEXT(N'appId')` inside an SQL Query or View as criteria for Form DesignEHR validation.
- Add this same sql to a select statement to use a stored procedure called from a form to access the appId - `SELECT * from MyTable WHERE appId = SESSION_CONTEXT(N'appId')`

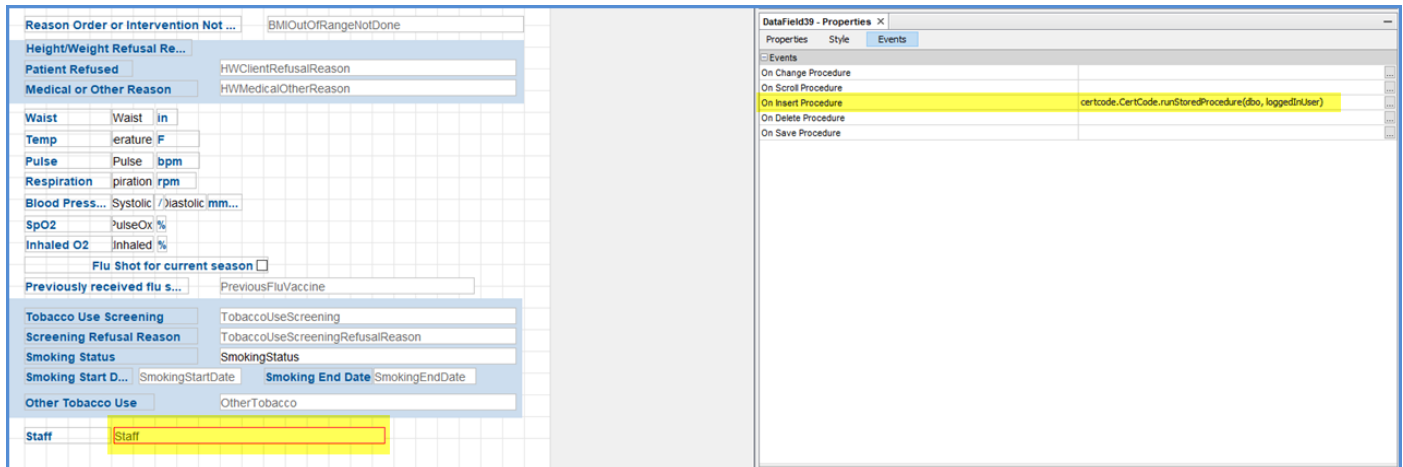
For example, the following Stored Procedure was created to populate the Staff column with the 'id' of the currently logged-in user.

```

create procedure [dbo].[loggedInUser] (
    @Staff char(36) OUT
) as
BEGIN
    set @Staff = (select s.id from staff s where s.AppUser = SESSION_CONTEXT(N'appId'));
END

```

The form was configured to call this stored procedure from an *On Insert Procedure* Event for the Staff field.



When the form is opened within EchoVantage, the Staff field is auto-populated with the current user.

REPORTS

New and Updated Reports

The following Fiscal report was added.

Client Account Inquiry – Provides a full inquiry on all or open Claims with an option to include or exclude Client Payments/Unapplied. Charge information is listed in the Service Transactions section which displays first. Client Payments and Unapplied Transactions follow on a new page.

The following reports were updated.

Billing Reports

_837Audit – Updated the 837 report to include send the void requests, CLM05-3 and REF*F8.

Fiscal Reports

Aging Detail By Payer for Export – Updated the report to display the correct descriptions in the 'Aging Bucket' column.

AR Status Report for Export – Updated to include the new Charge Status, Working.

Billed vs Received – Updated to include the new Charge Status, Working.

_Billed vs Received for Export – Updated to include the new Charge Status – Working.



Claims Report – Updated to include the new Charge Status, Working.

_Claims Report for Export – Updated to include the new Charge Status, Working.

Remittances Report – Updated to include the new Remittance statuses, *Void Requested* and *Void Sent*.






OTHER INFORMATION

A reminder for users responsible for creating custom content, especially custom Client Tabs and Forms, that the webhelp provides some useful information on [Custom Form Standards](#) and [Database Standards](#). The provided information helps to avoid potential upgrade issues or conflicts, particularly when Echo updates a core form or tab. For example, use of a child table linked by Client or id is recommended for collecting additional information needed for a core table.

There are also some quick reference guides available for creating report links and applying Client List Filters to reports.

- [Adding SSRS Report Links](#)
- [Applying Client List Filters to Custom Reports](#)
- [Applying Client List Filters to Reports Opened from Form Design/EHR Forms](#)

UPDATES

Ticket #	Description
EV-2981	The Scheduler was updated to improve its ability to scroll to the current time, indicated by the red line in Day or Week view, when opened from <i>Vantage Point > Clinical Home</i> or <i>Clients > Schedule</i> .
EV-3134	The descriptions on the following Alerts were updated for more clarity: <i>Events With No Services</i> , <i>Progress Notes Missing Signature</i> , <i>Service Missing Progress Note</i> , and <i>Wait List Opening</i> .
EV-3135	<p>The Progress Note Status icons, colors, and messages were updated to display consistently across the following locations.</p> <div data-bbox="315 1318 711 1549" style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> <ul style="list-style-type: none"> • Services List • Individual Service Progress Note Status • Scheduler Events, including the Quick Info Windows • Scheduler Configuration – Note Status Colors </div> <div data-bbox="789 1201 1463 1661" style="border: 1px solid #0070C0; padding: 10px;"> <p>Note Status Colors</p> <ul style="list-style-type: none">  Missing Progress Note (Not Required)  Missing Progress Note  Unsigned Progress Note  Signed Progress Note  Progress Note does not match Service Definition </div>
EV-3141	Work on general performance improvements continued in this release with a focus on the loading speed of the <i>Document Categories</i> screen in <i>Configuration > Staff/Users > Permissions</i> . Before this change, loading the page with 30+ User Groups and more than 335 Categories took more than 40 seconds. After applying the changes, the loading time for the same page was less than 2 seconds.



The Defined Filter is now visible on the Client Diagnosis card when it is defined.

Primary	Secondary
Start Date: 12/25/2019	Start Date: 10/01/2019
F32.2 - Major depressive disorder, single episode, severe without psychotic features	F10.10 - Alcohol abuse, uncomplicated
Defined Filter: Mental Health	Defined Filter: Alcohol and Drug

EV-3205

The 'Diagnosis Matching on Service Entry' selection in *Configuration > Setup > Diagnosis* determines whether Program or Defined Filter is displayed on the Diagnosis card.



EV-3246

The width of the RANumber column in Remittances and RemittanceBatches was increased from 20 to 40 characters to accommodate longer Payer RA numbers.

BUG FIXES

Ticket #	Case #	Description
EV-2167	76751	An issue was reported where the Job History search in <i>Fiscal Overview > Unprocessed Services</i> did not return results if the search was requested before the initial page loaded. The search failed and the button was non-responsive even after the initial page request completed. This issue was addressed in the Fiscal Overview Functions by disabling the search button and displaying the loading spinner until the page request is complete.
EV-3010		In <i>Configuration > Setup > Alerts</i> , the displayed list of Responsible Staff changed order when toggling between enabled and disabled and then saving. Updates were made to prevent the list from changing order when changing the status and saving. In addition, the names displayed in the Responsible Staff field and the values in the drop-down listing are now listed in alphabetical order.
EV-3065		An issue was discovered where a <i>Fiscal Overview > Create Charges</i> job failed IF a Service had an Add-on Service associated with it and the Add-on Service Definition did not have a rate configured. The issue was addressed, and this type of job no longer fails. Now if a Create Charges job includes an Add-on Service that does not have a rate configured, the job completes and the <i>No matching charge strategy</i> Error is triggered.
EV-3067		An issue was discovered on the <i>Labs > Unsolicited</i> page where the Client Card did not display after assigning an unsolicited result to a Client unless the page was manually refreshed. This issue has been addressed and now the card displays automatically after selecting <i>ASSIGN</i> in the <i>Assign Client</i> confirmation modal.
EV-3163	STHLT	An issue was reported where the Self-Pay billing job in <i>Fiscal Overview > Unbilled Charges > Create</i> was including Reversed jobs as having been billed when evaluating the Minimum Days Elapsed. (The Minimum Days Elapsed value is defined in <i>Configuration > Services/Payers > Payers > Billing Method</i> for the Self-Pay payer.) If a Self-Pay job was created and then reversed, the Charges included in that job could not be immediately reselected for inclusion in a new job. The issue has been addressed and Reversed jobs are no longer considered billed when evaluating Minimum Days Elapsed.
EV-3197	11525	An issue was reported where a medication prescribed in DrFirst with a future stop date displayed as <i>Completed</i> in the CCD export, even when the CCD job date parameters were within the active medication dates. The issue has been addressed, and now a medication with a stop date in the future displays as <i>Active</i> on the CCD Export.



EV-3254	An issue was discovered where the Bulk Actions on the <i>Batches > View Batch</i> screen failed when there were reprocessed Remittances associated with the Batch. The Bulk action button has been updated and now marks all eligible records as <i>Ready</i> .				
EV-3255	An issue was discovered where using the <i>Mark as Ready</i> button on the Batches screen for a Batch with associated Reprocessed Remittances generated both success and failure toasts. The issue was addressed by excluding any transaction associated with the Batch that has a status of <i>Done</i> , <i>Void Requested</i> , or <i>Void Sent</i> .				
EV-3256	<p>The word 'group' was updated to 'groups' in the <i>Attestation Label</i> help button text found in <i>Configuration > Staff/Users > User Groups > Profile</i>. In addition, the word 'Preview:' was added to indicate that this is how the label appears in the list when selecting the person (Staff, Client, Other) responsible for signing.</p> <div data-bbox="500 579 1511 1312"> <table border="1"> <tr> <td data-bbox="500 579 609 957">Before</td> <td data-bbox="609 579 1511 957"> </td> </tr> <tr> <td data-bbox="500 957 609 1312">After</td> <td data-bbox="609 957 1511 1312"> </td> </tr> </table> </div> <p>The label is helpful for Staff who are members of more than one User Group with an Attestation enabled.</p> <div data-bbox="841 1360 1511 1822"> </div>	Before		After	
Before					
After					
EV-3288	An issue was discovered where the job filter used to evaluate the <i>Minimum Days Elapsed</i> for Self-Pay Payers in <i>Fiscal Overview > Unbilled Charges > Create</i> was not considering finalized				



		jobs. If a Self-Pay <i>Create Bills</i> job was created and finalized, those same charges could immediately be included in another Self-Pay <i>Create Bills</i> job. If the job remained in <i>PREVIEW</i> status, the charges were not available. This issue has been addressed, and now the filter considers both billed (<i>PREVIEW</i> Status) and Finalized Self-Pay <i>Create Bills</i> jobs when evaluating the <i>Minimum Days Elapsed</i> .				
EV-3290	COOS	An issue was reported where archiving all messages in the <i>MESSAGES</i> section of the Inbox resulted in a fatal error. This issue has been addressed and now all messages can be archived at the same time without receiving an error.				
EV-3291		An issue was identified where the clicking the icon (Notice, Warning, Critical) for the <i>Tasks Due Alert</i> opened the legacy Remittance page in error. The issue was corrected and now clicking on a <i>Tasks Due Alert</i> icon correctly opens the <i>Claim Details</i> page where the <i>Task</i> was assigned (Claims Management or Batches > View Batch > Edit Row).				
EV-3325	11869	<p>An issue was reported with DrFirst where the Prescribing Staff name was not always displayed correctly on medications. The issue was caused by the same DrFirst ID assigned to more than one Staff. The following changes were made to prevent this from occurring again in the future.</p> <ul style="list-style-type: none"> • A script was created to identify any instances where the same DrFirst ID is assigned to more than one Staff. This script is run before the upgrade; any results must be addressed before continuing. • A second script updates any DrFirst IDs stored in the database as empty strings or just spaces to <i>NULL</i>. Empty strings and spaces are considered duplicates by the new constraint. • A unique key constraint was added to the <i>dbo.Staff</i> table that prevents saving the same DrFirst ID to more than one staff. 				
EV-3328		<p>The hint text for the columns in <i>Clients > Documents</i>, <i>Families > Documents</i>, and <i>Placements > Documents</i> were updated to display the correct text.</p> <table border="1"> <tr> <td>Before</td> <td> </td> </tr> <tr> <td>After</td> <td> </td> </tr> </table>	Before		After	
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EV-3345	11709	An issue was reported where the <i>Aging Bucket</i> column descriptions were not correct in the CSV friendly version of the <i>Aging Detail by Payer</i> Report. The cause was found to be an incorrect parameter passed to the subreport. This parameter was updated, and now the descriptions in the <i>Aging Bucket</i> column is the same in each report.				
EV-3358	12029	An issue was reported where the Medication Route Field in DrFirst (varchar, 30) exceeded the maximum amount allowed in <i>dbo.ClientMedications.Route</i> (varchar, 20) table. When the route text exceeded the column limit, the Client medication failed to update but no error was captured. The issue was addressed by increasing the Route column in the database to match that in DrFirst, and the error logging was updated to capture this type of unexpected error in Graylog and the logging table.				



EV-3371	12088	An issue was reported where Form DesignEHR was opening a blank form after signing a new form record. The issue has been addressed and now the signed form displays after signing a new record.				
		<p>An issue was reported where the cursor was not in focus in a <i>Send</i> popover inside of a Modal (i.e., selecting <i>Send</i> from a form) unless the user clicked in the Recipients field twice. The issue was addressed, and now clicking in the Recipients drop-down listing correctly focuses the cursor.</p> <div data-bbox="500 436 1513 1434"> <table border="1"> <tr> <td data-bbox="500 436 649 934">Before</td> <td data-bbox="649 436 1513 934"> </td> </tr> <tr> <td data-bbox="500 934 649 1434">After</td> <td data-bbox="649 934 1513 1434"> </td> </tr> </table> </div>	Before		After	
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EV-3390	Coos	An issue was discovered where changing the <i>Time Per Row</i> selection in the <i>Vantage Point > Clinical Home > Scheduler > Configuration Settings</i> also cleared the current <i>Week View Days</i> selection. The issue has been addressed and the <i>Time Per Row</i> selection can be edited without affecting the selected <i>Week View Days</i> .				
EV-3422		An issue was discovered where changing the <i>Time Per Row</i> selection in the <i>Vantage Point > Clinical Home > Scheduler > Configuration Settings</i> also cleared the current <i>Week View Days</i> selection. The issue has been addressed and the <i>Time Per Row</i> selection can be edited without affecting the selected <i>Week View Days</i> .				
EV-3462	11771	<p>An issue was reported where an arithmetic overflow error occurred when importing an 835. The cause was due to PLB amounts that exceeded 999,999. To resolve this issue and prevent future issues, the <i>Amount</i> columns in the following tables were increased to 999,999,999 (<i>numeric(11, 2) NOT NULL</i>).</p> <ul style="list-style-type: none"> • Payments • Adjustments • Remittances • UnappliedPayments 				





<p>EV-3502</p>	<p>6104</p>	<p>A regression was reported on the Client Payers screen – the Payer names were no longer displayed in bold. This issue was addressed and now the Payer name and code are again displayed in bold.</p> <table border="1"> <tr> <td data-bbox="487 294 1006 556"> <p>Before</p> </td> <td data-bbox="1006 294 1531 556"> </td> </tr> <tr> <td data-bbox="487 556 1006 882"> <p>After</p> </td> <td data-bbox="1006 556 1531 882"> </td> </tr> </table>	<p>Before</p>		<p>After</p>																																																																											
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<p>EV-3627</p>		<p>In <i>Fiscal Overview > Unbilled Charges > Create Bills</i>, the filter sidebar is now a fixed size for all screen sizes. The table and message grid to the right now has a minimum width and scrolls horizontally when there is not enough room. Before these changes were applied, the filters could become inaccessible in a small screen.</p>																																																																														
<p>EV-3591</p>		<p>A display issue was addressed in the <i>Families > Document</i> upload when the document category filters were set to filter by individual permissions in <i>Configuration > Staff/Users > Permissions > Documents</i>. The document was not visible in the list after selecting a category and uploading it. Now the documents display when uploaded as expected.</p>																																																																														
<p>EV-3638</p>	<p>12457</p>	<p>An issue was reported with the waterfall job to self-pay where any Client Fee of '0' was not respected, regardless of the type (Flat Fee, Percent, Sliding Fee, or Monthly Maximum). Instead, the full balance was passed on to the self-pay payer - the <i>Before</i> image below.</p> <p>This issue was addressed, and now when a balance waterfalls to self-pay AND the Client Fee is '0' or is '0' for that specific service due to Defined Filter, the self-pay charge is created for the waterfall amount AND a client fee adjustment is created to adjust it to zero – the <i>After</i> image below.</p> <table border="1"> <thead> <tr> <th colspan="3">Before</th> <th colspan="3">After</th> </tr> </thead> <tbody> <tr> <td colspan="3"> <p>BCBSNH</p> <table border="1"> <thead> <tr> <th>Transaction Date</th> <th>Amount</th> <th>Reason</th> </tr> </thead> <tbody> <tr> <td>04/15/2022</td> <td>\$ 200.00</td> <td>CHARGE CREATED</td> </tr> <tr> <td>04/15/2022</td> <td>\$ 20.00</td> <td>CONTRACT ADJ</td> </tr> <tr> <td>04/18/2022</td> <td>\$ 0.00</td> <td>PAYER PAYMENT</td> </tr> <tr> <td>04/18/2022</td> <td>\$ 180.00</td> <td>BALANCE ZEROING CREDIT</td> </tr> <tr> <td>Total Balance:</td> <td>\$ 0.00</td> <td></td> </tr> </tbody> </table> </td> <td colspan="3"> <p>MDCD</p> <table border="1"> <thead> <tr> <th>Transaction Date</th> <th>Amount</th> <th>Reason</th> </tr> </thead> <tbody> <tr> <td>04/19/2022</td> <td>\$ 200.00</td> <td>CHARGE CREATED</td> </tr> <tr> <td>04/19/2022</td> <td>\$ 0.00</td> <td>PAYER PAYMENT</td> </tr> <tr> <td>04/19/2022</td> <td>\$ 180.00</td> <td>BALANCE ZEROING CREDIT</td> </tr> <tr> <td>04/19/2022</td> <td>\$ 20.00</td> <td>CONTRACT ADJ</td> </tr> <tr> <td>Total Balance:</td> <td>\$ 0.00</td> <td></td> </tr> </tbody> </table> </td> </tr> <tr> <td colspan="3"> <p>SELF</p> <table border="1"> <thead> <tr> <th>Transaction Date</th> <th>Amount</th> <th>Reason</th> </tr> </thead> <tbody> <tr> <td>04/18/2022</td> <td>\$ 180.00</td> <td>CHARGE CREATED</td> </tr> <tr> <td>Balance:</td> <td>\$ 180.00</td> <td></td> </tr> <tr> <td>Total Balance:</td> <td>\$ 180.00</td> <td></td> </tr> </tbody> </table> </td> <td colspan="3"> <p>SELF</p> <table border="1"> <thead> <tr> <th>Transaction Date</th> <th>Amount</th> <th>Reason</th> </tr> </thead> <tbody> <tr> <td>04/19/2022</td> <td>\$ 180.00</td> <td>CHARGE CREATED</td> </tr> <tr> <td>04/19/2022</td> <td>\$ 180.00</td> <td>FEE ADJ</td> </tr> <tr> <td>Total Balance:</td> <td>\$ 0.00</td> <td></td> </tr> </tbody> </table> </td> </tr> </tbody> </table>	Before			After			<p>BCBSNH</p> <table border="1"> <thead> <tr> <th>Transaction Date</th> <th>Amount</th> <th>Reason</th> </tr> </thead> <tbody> <tr> <td>04/15/2022</td> <td>\$ 200.00</td> <td>CHARGE CREATED</td> </tr> <tr> <td>04/15/2022</td> <td>\$ 20.00</td> <td>CONTRACT ADJ</td> </tr> <tr> <td>04/18/2022</td> <td>\$ 0.00</td> <td>PAYER PAYMENT</td> </tr> <tr> <td>04/18/2022</td> <td>\$ 180.00</td> <td>BALANCE ZEROING CREDIT</td> </tr> <tr> <td>Total Balance:</td> <td>\$ 0.00</td> <td></td> </tr> </tbody> </table>			Transaction Date	Amount	Reason	04/15/2022	\$ 200.00	CHARGE CREATED	04/15/2022	\$ 20.00	CONTRACT ADJ	04/18/2022	\$ 0.00	PAYER PAYMENT	04/18/2022	\$ 180.00	BALANCE ZEROING CREDIT	Total Balance:	\$ 0.00		<p>MDCD</p> <table border="1"> <thead> <tr> <th>Transaction Date</th> <th>Amount</th> <th>Reason</th> </tr> </thead> <tbody> <tr> <td>04/19/2022</td> <td>\$ 200.00</td> <td>CHARGE CREATED</td> </tr> <tr> <td>04/19/2022</td> <td>\$ 0.00</td> <td>PAYER PAYMENT</td> </tr> <tr> <td>04/19/2022</td> <td>\$ 180.00</td> <td>BALANCE ZEROING CREDIT</td> </tr> <tr> <td>04/19/2022</td> <td>\$ 20.00</td> <td>CONTRACT ADJ</td> </tr> <tr> <td>Total Balance:</td> <td>\$ 0.00</td> <td></td> </tr> </tbody> </table>			Transaction Date	Amount	Reason	04/19/2022	\$ 200.00	CHARGE CREATED	04/19/2022	\$ 0.00	PAYER PAYMENT	04/19/2022	\$ 180.00	BALANCE ZEROING CREDIT	04/19/2022	\$ 20.00	CONTRACT ADJ	Total Balance:	\$ 0.00		<p>SELF</p> <table border="1"> <thead> <tr> <th>Transaction Date</th> <th>Amount</th> <th>Reason</th> </tr> </thead> <tbody> <tr> <td>04/18/2022</td> <td>\$ 180.00</td> <td>CHARGE CREATED</td> </tr> <tr> <td>Balance:</td> <td>\$ 180.00</td> <td></td> </tr> <tr> <td>Total Balance:</td> <td>\$ 180.00</td> <td></td> </tr> </tbody> </table>			Transaction Date	Amount	Reason	04/18/2022	\$ 180.00	CHARGE CREATED	Balance:	\$ 180.00		Total Balance:	\$ 180.00		<p>SELF</p> <table border="1"> <thead> <tr> <th>Transaction Date</th> <th>Amount</th> <th>Reason</th> </tr> </thead> <tbody> <tr> <td>04/19/2022</td> <td>\$ 180.00</td> <td>CHARGE CREATED</td> </tr> <tr> <td>04/19/2022</td> <td>\$ 180.00</td> <td>FEE ADJ</td> </tr> <tr> <td>Total Balance:</td> <td>\$ 0.00</td> <td></td> </tr> </tbody> </table>			Transaction Date	Amount	Reason	04/19/2022	\$ 180.00	CHARGE CREATED	04/19/2022	\$ 180.00	FEE ADJ	Total Balance:	\$ 0.00	
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