Santrax® Agency Management and Santrax® Payor Management 6.9.25

Release Date: Thursday, April 26, 2018

UNIVERSAL RELEASE NOTES

The content of the enclosed Release Notes is dependent upon final Quality Assurance validation. If you have any questions or concerns about the content therein, please contact Customer Care at your agency's designated telephone number. The final version will be available in your online library post-release.

Valued Provider:

We are now including all items in the release notes. They may or may not apply to your configuration.
In reviewing the notes below, please refer to the "prerequisites" line which indicates the required functionality, product, or audience associated with the item.
If the functionality is not automatically available, please contact your Sales Representative or Customer Care for additional information.

CLIENT

1. **NEW HEALTH ASSESSMENT ALERT MESSAGING.**
   The alert sent when field staff answer 'Yes' using MVV or '99' using telephony to the **Has the patient's condition changed?** health assessment question was updated to read as follows:
   > "The following patient under your supervision has been reported as having a condition change:
   > *<First Name> <Last Initial>*
   > Last 4 digits of Medicaid ID: *<Last 4 digits of clientOtherID if found, otherwise 'Unknown'>*
   > PA#: *<Patient Authorization number if found, otherwise (or if there are multiple) 'Unknown'>*
   > Please review this patient's case record for further information."

   Prerequisite: CTDSS Payer

2. **SECURITY PERMISSIONS MODIFICATIONS.**
   Resolved an issue preventing office staff with the correct security permissions from updating client social security numbers.
   Prerequisite: None

SCHEDULING

3. **SANTRAX MAINTENANCE PRINT PREVIEW MODIFICATIONS.**
   The print preview report for the *Santrax Maintenance* screen was modified to ensure that visit exceptions match what is displayed on the *Santrax Maintenance* screen.
   Prerequisite: None

4. **LIVE IN EQUIVALENCY MODIFICATIONS.**
   Modification were made to ensure that when schedules with a live in equivalency are overwritten, the live in equivalency is not ignored.
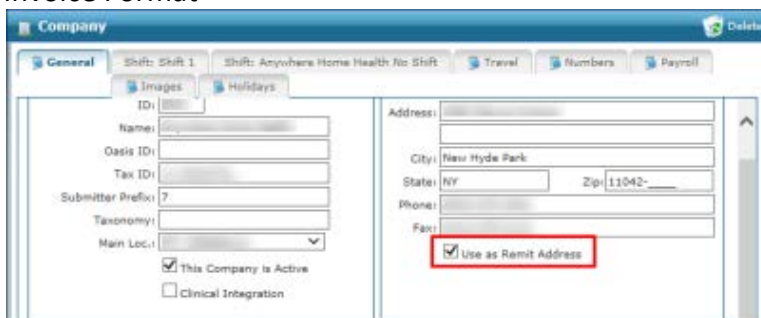   **Prerequisite:** None

BILLING

5. **REMIT ADDRESS MODIFICATIONS.**

Updated the 'Client Invoice' paper format to print the remit address from the *General* tab of the *Location Detail* screen or the *Company* screen. When entering a remit address, the **Use Location Address on Invoice** checkbox must be selected to include the address on the invoice.

Prerequisite: Client Invoice Format

6. **STAFF STATUS MODIFICATIONS.**

A new dropdown, **Update Status from 04 Terminated to**, allows users to change the status of a staff member from '04-Inactive' to '01-Recruit' or '02-Active'. If a user adds an **Effective Date** that is earlier than the terminated date, the following warning message displays: "Warning: The Effective Date entered proceeds the terminated date. Please review and adjust the date entered or select **Next** to continue".

Prerequisite: None

7. **NEW SPLIT SCHEDULE FUNCTIONALITY.**

A new checkbox, **Allow Schedule Split Functionality**, was added to the *System Payor* screen's *General* tab. When selected, this checkbox allows the user to filter for and select all applicable schedules on the *Billing Review* screen. The user can then right click and select **Split Schedules** to divide the schedule based on time. This functionality will not split billed or paid schedules. This function is useful for payers or authorizations that require schedules that span days to accurately reflect the date for which the hours of service occurred rather than the schedules start date.

Prerequisite: None

8. **MASS EDIT BILL TYPE.**

Added the ability for users with the appropriate permissions (Schedules - Mass Edit) to mass edit the **Bill Type** of schedules, that have not been billed, on the *Billing Review* screen. This functionality is only available on the *Billing Review* screen, when a client filter is applied, for items that are not billed.

Prerequisite: None

9. **BILLING FORMAT MODIFICATIONS.**
   Added a new checkbox, **Include Contract Info in the 2310B Loop**, on the *EDI Settings* tab of the *System Payor* screen. When selected, the system will apply the contract information from the **Locator** number to the 5010 837P billing invoice format.
   Prerequisite: 5010 837P Format
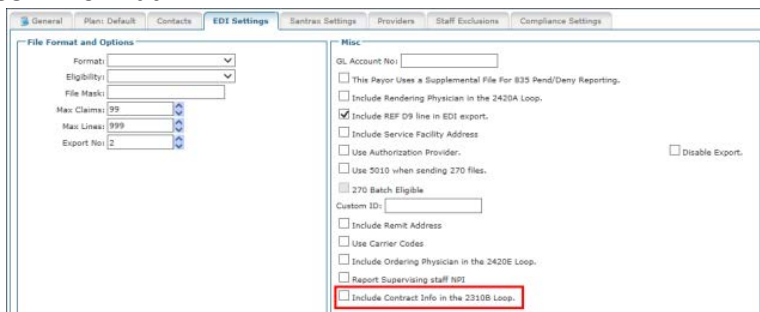
10. **NEW NOT OK TO BILL REASON: MISSING AUTHORIZATION NUMBER.**
    Created a new 'Not Ok to Bill' reason, 'Authorization Reference No. is Missing'. This allows users to filter the *Billing Review* screen for items that have a missing authorization reference number and make any necessary corrections.
    Prerequisite: None

11. **RI 835 MODIFICATIONS.**
    New denial codes were added for agencies with a RI payer.
    Prerequisite: RI Payer

12. **BILLING REVIEW PRINT PREVIEW MODIFICATIONS.**
    Updated the totals section of the *Billing Review* screen's print preview to match the totals section at the bottom of the *Billing Review* screen.
    Prerequisite: None

13. **BILLING EXPORTS MODIFICATIONS.**
    Corrected an issue preventing billing exports for specific clients.
    Prerequisite: None

14. **MANUAL REMITTANCE BATCH MODIFICATIONS.**
    Corrected an issue causing the deletion of write off amounts from saved manual remittance batches.
    Prerequisite: Manual Remittance Functionality.

15. **837I MODIFICATIONS.**
Modifications were made to prevent the addition of an extra colon when more than one occurrence span entry is used.
Prerequisite: None

PAYROLL

16. **PAYROLL TIMEFILE MODIFICATIONS.**
Modifications were made to ensure the **SAM Payroll Export** format displays visits that cross shifts using the correct date.
Prerequisite: SAM Payroll Export Format

17. **PAYROLL REVIEW MODIFICATIONS.**
Resolved an issue that caused an additional staff participant line when live in schedules were updated from the **Payroll Review** screen.
Prerequisite: None

REPORTS

18. **AGED INVOICE - DETAILED EXTENDED REPORT MODIFICATIONS.**
Updated the **Aged Invoice - Detailed Extended** report so that the **Current** column now only displays invoices that are within the term offset, defined at the payor level. Added a new column **1-30**, which displays invoices that are 1-30 days passed the payer's term offset. Added a new checkbox to the report's filters, **Only Past Term**. When this checkbox is selected, the report excludes the **Current** column.
Prerequisite: None

19. **AR TRIAL BALANCE REPORT MODIFICATIONS.**
Updated the **AR Trial Balance** report to include grand total summaries for the following:
- New Invoices - Sum of all new invoices
- Net Adjustments - Sum of all Net Adjustments
- Net Cash - Sum of all Net Cash
- Starting Balance - Sum of all Starting Balance totals, separated by age (0-30, 31-60, 61-90, 91-120, over 120)
- Ending Balance - Sum of all Ending Balance totals, separated by age (0-30, 31-60, 61-90, 91-120, over 120)

Prerequisite: AR Functionality

	Total					
New Invoices Grand Total :	$0.00					
Net Adjustments Grand Total :	$0.00					
Net Cash Grand Total :	$0.00					
	Total	0-30	31-60	61-90	91-120	Over 120
Starting Balance Grand Total :	$1,221.00	$0.00	$0.00	$0.00	$0.00	$1,221.00
Ending Balance Grand Total :	$1,221.00	$0.00	$0.00	$0.00	$0.00	$1,221.00
AR Trial Balance						Page 1 of 1

20. **PAYROLL REVIEW REPORT MODIFICATIONS.**
The **Payroll Review** report's **Event Status** filter is now a multi-select field. The following columns were added to the report:
- **Event Status**
- **Pay Status**

Prerequisite: Payroll Functionality

Payroll Review

Event Status IN(01- Pending,02- Confirmed), From 03/23/2016 To 04/16/2018 11:59 PM

Date	Client	Chart ID	Service	EC	IN	OUT	Quantity	Units	Rate	Amt	Supplies	Event Status	Pay Status	O
08/22/16			AD	05	08:00	16:00	1.00	28	$0.00	$0.00	$0.00	01-Pending	01-Pending	
08/23/16			AD	05	08:00	16:00	1.00	28	$0.00	$0.00	$0.00	01-Pending	01-Pending	
08/31/16			AD	05	08:00	16:00	1.00	29	$0.00	$0.00	$0.00	01-Pending	01-Pending	
09/12/17			PC	05	12:30	13:30	1.00	4	$13.00	$13.00	$0.00	01-Pending	01-Pending	
09/12/17			HHA	05	16:00	22:00	6.00	24	$0.00	$0.00	$0.00	01-Pending	01-Pending	
							16.00			$13.00	$0.00			

21. **INVOICE DETAIL CSV REPORT MODIFICATIONS.**
Added a new checkbox, **Show Invoices Exported Multiple Times**, to the **Invoice Detail CSV** filters. This checkbox is selected by default. When this checkbox is deselected, invoices only appear once on the report no matter how many time they were exported. The report's **Hours** column now displays the live in equivalency for applicable visits.
Prerequisite: Billing Functionality

22. **PLAN OF CARE EXCEPTION REPORT MODIFICATIONS.**
Modifications were made to ensure schedules without an authorization are included in the **Plan of Care Exception** report.
Prerequisite: Plan of Care Functionality