Santrax® Agency Management and Santrax® Payor Management 6.9.26

Release Date: Thursday, May 24, 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.

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BILLING

1. **PAYMENT SCREEN MODIFICATIONS.**
   Modifications were made to ensure the Historian on the Payments screen includes all changes and identifies which staff member made the change.
   **Prerequisite:** None

REPORTS

2. **NON-COMPLIANT STAFF REPORT MODIFICATIONS.**
   The Attend Date column on the Non-Compliant Staff report displays no data if the date precedes the staff member's rehire date.
   **Prerequisite:** None

3. **NON-COMPLIANT MAIL MERGE REPORT CHANGES.**
   The following updates were incorporated in the Non-Compliant Mail Merge report.
   - The date filter changed to a Status Effective Date From and Status Effective Date To filters.
   - Added Language, Staff Status and Status Reason columns.
   - Changed the format used for the Hire Date and Termination Date columns to mm/dd/yyyy.
   **Prerequisite:** None

4. **CANCELLED EVENTS BY REASON REPORT MODIFICATIONS.**
   The Cancelled Events by Reason report now includes the cancellation reason and related notes in the Notes column. When there is no cancellation note, the Schedule Detail note will show in its place if applicable.
   **Prerequisite:** None

5. **BILLING REVIEW MODIFICATIONS.**
   Modifications were made to ensure that when hold split shift billing is enabled, all applicable (or schedules with a status of Hold) schedules are categorized as 'Not OK to Bill' and are not billed until resolved, when hold split shift billing is enabled.
   **Prerequisite:** Hold Split Shift Billing Functionality

6. **CASH AND ADJUSTMENT DETAIL CSV REPORT MODIFICATIONS.**
   A new column, Orig Invoice Date, was added to the Cash and Adjustment Detail CSV report.
   **Prerequisite:** None