



Santrax[®] Agency Management and Santrax[®] Payor Management 6.9.30

Release Date: Thursday, July 19, 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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SCHEDULING

1. NEW CARFARE EXCEPTION.

Added a new carfare exception. This new carfare exception is included in the **Exceptions** drop-down on the *Santrax Maintenance* screen and can be used as a filter for this exception. This functionality is set up in the **Travel Time and Carfare** section of the *System Settings* screen. Schedules with carfare event codes are flagged with this exception, for the reason "carfare exception", and placed in a status of Hold under the following conditions:

- Carfare Accepted Amount - When the value in the **Carfare** field (on an applicable schedule) does not match the value in the **Carfare Accepted Amount** field
- Cluster Visit - When a value exists in the **Carfare** field on a schedule that is flagged as a cluster visit
- Under - When the difference in time between this schedule and the previous schedule is less than or equal to the amount entered in the **Disqualify Schedule When: Schedules Under xx Minutes Apart** field
- Over - When the difference in time between this schedule and the previous schedule is greater than the amount entered in the **Disqualify Schedule When: Schedules Over xx Minutes Apart** field
- When a schedule has a carfare event code and the previous schedule is not confirmed

Prerequisite: Carfare Functionality

BILLING

2. PAYOR RATE PLAN HISTORIAN.

Added the **Historian** to the **Plan** tab on the *System Payor* screen (**Billing > Payor > Plan**). On this screen, the following changes are identified with a green highlight when selected using the historian:

- Changes to the Viewing Plan, Copay and Options sections

Prerequisite: None