



Santrax[®] Agency Management and Santrax[®] Payor Management 6.9.31

Release Date: Thursday, August 2, 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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CLIENT

1. IMPORT PLAN OF CARE FILE FROM VNS THIRD-PARTY INTERFACE.

Added new functionality to support importing Plan of Care (POC) files from the VNS third-party interface and mapping data to the corresponding fields in the system. Users can select the days of the week for each task, all other imported POC data cannot be edited.

Prerequisite: VNS Third-Party Interface

SCHEDULING

2. NEW ASSUMED CALL FUNCTIONALITY.

Added a new **Allow Split Payor/Service Calls** checkbox to the *System Settings (Santrax)* screen. When enabled, the system auto-populates any interim schedule call times for consecutive schedules with different services using the same client and staff. All schedules must be in place before the start of the first scheduled visit. Field staff must place two calls (call in for the first schedule and call out for the last schedule). Tasks entered during the out call are applied to each consecutive visit that occurred between the in and out calls. All assumed Santrax calls are underlined in the system for easy identification. Assumed call functionality cannot be used with shared call functionality. To enable this functionality, please contact Customer Care.

Prerequisite: None

3. ABILITY TO CHANGE SANTRAX DURATION ON SCHEDULE.

Created a new security permission, **Santrax Duration**, in the *Scheduling* section. Users with this permission can edit the value in the **Santrax: hrs** (duration) field on the **Schedule Detail** screen of schedules. Two-digit numbers with two decimal places can be entered in this field. If the status of a previously edited schedule is changed to **Hold** or **Pending**, then the schedule will recalculate value in the **Santrax hrs** (duration) field based on the **Santrax** in and out times and any previous edits are ignored. When the value in the **Santrax hrs**(duration) field is edited, the billing quantity is changed to match. When schedules have more than one bill participant line (line item in the *Client* section), the difference in duration is applied beginning with the last participant line. This functionality only allows users to edit schedules that meet the following criteria:

- The **Status** of the schedule must be either 'Confirmed' or 'In Process'(*Client Status*: 'Confirmed').

Prerequisite: None

BILLING

4. ON INVOICE VOID LINE ITEM MODIFICATIONS.

Modifications were made to give users the ability to void line items on an invoice and release the schedule without having to close and reopen the invoice. A new checkbox has been added to every line item in the **Refresh** column on the *Attached Items* tab of the *Invoice* screen. After making changes to a line item, select the **Refresh** checkbox on that line and click **Save** to apply changes and release the schedule.

Prerequisite: None

5. REMITTANCE REPORT MODIFICATIONS.

Modified the existing imported electronic remittance report (**Billing > Remittance**) so that users can quickly determine if action is needed. Please note, users must first preview the remittance file, then upload/import it in order to see the changes in the report.

- Added the following new statuses, which display in the **Status** column:
 - **Review Zero**: Identifies claims that have a payment with \$0.00 that have not been identified as a denial
 - **Review Other**: Identifies claims that have received a payment (partial or overpayment)
- Changed the existing **Denial Code** column on the report to **Adj/Denial Code**
 - This column displays the CAS or MOA code listed on a remittance (comma separated) if the status of the claim is **Review Zero** or **Review Other**
- Created new grand total categories, on the final page of the report, for the new statuses .

Modified the report to display all CAS/MOA segment codes found in an 835 with the associated remittance claims and update the status based on the CAS/MOA code. If the CAS/MOA segment code is a known denial code, the status displays as denied. If the CAS/MOA segment code is not a known denial code, the following logic is applied to the report output:

- Claims with a payment of \$0.00 display the following:
 - The **Review Zero** status in the **Status** column
 - The CAS Code in the **Adj/Denial Code** column
 - The MOA code in the **Adj/Denial Code** column
- Claims with a partial or overpayment display the following:
 - The **Review Other** status in the **Status** column
 - CAS code in the **Adj/Denial Code** column

Prerequisite: Electronic Remittance Functionality

REPORTS

6. NEW REPORT - WEEKLY SCHEDULED EVENTS.

Created a new report, **Weekly Scheduled Events (Reporting > Scheduling)**. The report is filtered using the **Week Ending Date** filter, the report displays data from the selected date and the previous six days. This report displays information about clients, that had schedules during the selected timeframe, in a PDF format. The following columns display in the report output:

- **Client ID**
- **Name**
- **Address**
- **Phone**
- **Borough**
- **Location**
- **SOC: Date**
- **Disaster Level**
- **Evacuation Zone**
- **ICD-9 Description**
- **ICD-10 Description**
- **Date**
- **Staff**
- **Service**
- **In**
- **Out**
- **Total**
- **Status**
- **Payer**

Prerequisite: None

7. NEW SCHEDULE VERIFICATION ADDITIONAL DETAILS REPORT.

Created a new report, *Schedule Verification Additional Details (Reports > Scheduling)*. This new report is a copy of the *Schedule Verification Report* but includes the following additional information:

- Added new columns to the report output:
 - **Pay Hours**
 - **Bill Hours**
 - **Authorized Hours** (For daily authorizations): If the authorization is by units, or visits, they are converted to hours. If the authorization is by Live-In, it is converted to hours if there is an equivalency on the admission.
 - **Authorized Hours** (For weekly authorizations): For weekly authorizations, a **W** displays in the **Authorized Hours** column.
- Added new fields to the **Totals for Client** section:
 - **Auth Hours**: Sum of all daily authorized hours.
 - **Auth Hours**: Sum of all weekly authorized hours.
- Added grand totals on the last page of the report:
 - **Grand Total Pay Hours**
 - **Grand Total Bill Hours**
 - **Grand Total Authorized Hours**: If the authorization is by units, or visits, they are converted to hours. Live-In visits are converted to hours if there is an equivalency on the admission.
- A new filter, **Week Of:**, allows the user to limit the results by:
 - (Week Of:) Service (WOS)
 - (Week Of:) Confirmation (WOC)
- The **Group By:** filter now includes WOS and WOC options.

Prerequisite: None