Santrax® Agency Management and Santrax® Payor Management 6.9.32

Release Date: Thursday, August 16, 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.

SCHEDULING

1. **NEW ASSUMED CALL(S) EXCEPTIONS.**
Created new 'Assumed Call(s)' exception. This is an information only exception, schedules flagged with this exception are not placed in a status of 'Hold' and cannot be cleared from a schedule. Any schedule with one or more 'Assumed Calls' is automatically flagged with the exception on the *Visit Maintenance* screen. Users can filter for this exception using the **Exception** filter on the *Visit Maintenance* screen.
Prerequisite: Assumed Call Functionality

REPORTS

2. **NEW REPORT - SCHEDULE FULFILLMENT TRACKING - ENHANCED**
Created a new report, *Schedule Fulfillment Tracking - Enhanced*. This report will assist agencies in monitoring and identifying the reasons for missed billing by displaying the difference between what was scheduled and what was billed as well as the difference between what was authorized and what was billed. This report provides an estimated cash flow impact for time not billed assuming the rate used from the most recent schedule. The recap section of the report will also provide visibility into the cash impact that occurs when a schedule is edited. From the *Value Items: Edit Reason* screen, users can map reason codes to export codes to populate this section. The following codes must be used for this report: C=Controllable, NC=Not Controllable, Blank or other values= Other Recap).
Prerequisite: None
3. **BILL-PAY DISCREPANCIES BY CLIENT CSV MODIFICATIONS.**
Added a multi-select **Multiple Event Item Status** filter for the *Bill-Pay Discrepancies By Client CSV* report.
Prerequisite: Billing

ADMIN

4. **MARITAL STATUS MODIFICATIONS.**
Converted the ID used in the **Value** column on the *Value Items: Marital* screen. The ID in this column was changed as follows:
    - S: Single
    - M: Married
    - J: Married filing jointly
    - P: Married filling separately
    - H: Head of household
    - Q: Qualifying widow(er) with dependent child.

    Prerequisite: None