



Santrax[®] Agency Management and Santrax[®] Payor Management 6.9.38

Release Date: Thursday, November 8, 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. NEW CHANGE PAYOR FEATURE.

Created new functionality allowing users to change a single client's payer by cloning the existing admission to create a new admission. On the *Client Search* screen, right-click a client, select **Change Payor** and follow the prompts. Following this process end-dates and then clones the current admission under the new payor without requiring the user to manually create a new admission. To enable this functionality, please contact customer care.

Prerequisite: None

SCHEDULING

2. CALL TYPE FILTER ADDED TO SANTRAX MAINTENANCE.

Added a **Call Type** filter to the *Santrax Maintenance* screen. This filter allows users to limit the results by the method used to check in or out of a visit. The following options are available in this filter:

- 'Mobile' - Displays only visits completed using a mobile app (SMC/MVV)
- 'TVV' - Displays only visits completed using a phone call (telephony)
- 'FVV' - Displays only visits completed using a Fixed Visit Verification (FVV) device

Prerequisite: None

3. MASS EDIT WARNING NOTICE MODIFICATION.

Modifications were made to ensure, when using mass edit functionality, users cannot save a schedule that does not have the required tasks based on the payer setting. The warning messages that displays can no longer be overridden.

Prerequisite: None

REPORTS

4. BILLING REVIEW CSV REPORT MODIFICATIONS.

Added **Not OK to Bill Reasons** and **Coordinator** filters and columns to the *Billing Review CSV* report.

Prerequisite: None

5. ACTIVE CLIENT TAL EMERGENCY REPORT MODIFICATIONS.

Added the following columns to the *Active Client TAL Emergency Report*:

- **DOB** (Date of Birth)
- **DNR** (Do Not Resuscitate)
- **Equipment** (Durable Medical Equipment and Supplies)

Prerequisite: None

6. EXPIRING AUTHORIZATIONS REPORT UPDATES.

Made the following changes to the *Expiring Authorizations* report:

- The **Payor** filter is now multi-select
- Added a **Payor** option to the *Group By* and *Sorting* sections

Prerequisite: None

GLOBAL

7. TASK NOTE MODIFICATIONS.

Modifications were made to ensure saved task notes cannot be deleted.

Prerequisite: None

8. NEW SECURITY PERMISSION.

Added a new security permission, **Client Status**. When assigned, this permission allows the user to edit a client's admission status. This ability was previously affiliated with the **Client (Edit)** permission which allows the user to add a client. The new permission is enabled for all users with the old permission.

Prerequisite: None