Santrax® Agency Management and Santrax® Payor Management 6.9.43

Release Date: Thursday, January 17, 2019

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.

CLIENT

1. **Updates to the Clients Schedules Calendar View.**
   Updated the calendar view (displayed using the show client calendar checkbox) of the schedules section of the client's EHR for better readability and display. Also added three new fields **Bill** (billed hours) and **Pay** (pay hours) and **Service**.
   Prerequisite: None
2. **OASIS-D Modifications.**
   Modifications were made to ensure OASIS question J1900 is skipped and the exported .xml is updated correctly when applicable.
   Prerequisite: Clinical Integration
3. **Cloning Admissions Modification.**
   Modifications were made to ensure that when cloning an admission, the End Of Care (EOC) date is updated and any pending schedules after the discharge date of the previous admission are canceled when the user does not move schedules to the cloned admission.
   Prerequisite: Admission Cloning

BILLING

4. **New Payer Setting.**
   Added a new checkbox, **Ignore Weekend Split**, to the *System Payor* screen's *General* tab. Select this checkbox to display a single rate line in the *Clients* section of the *Schedule Detail* screen, when a schedule's time frame requires both weekend and weekday rates. Only data from the billing rate line in effect as of the schedule's start date displays on the invoice and *Schedule Detail* screen.
   Prerequisite: None

PAYROLL

5. **Updates to Payroll Master Rates Table.**
   Users can now select 'DEF' for the **Service** column when creating a pay rate using the *Master Rates: Payroll* table.
   Prerequisite: Payroll

REPORTS

6. PAYROLL REVIEW UPDATE.

Added a new checkbox, **Show As Summary**, to the **Payroll Review** report's filters (**Reports** > **Payroll** > **Payroll Review**). Select this checkbox to display a summary version of the *Payroll Review* report. The condensed view includes: **Staff**, **Agency ID**, **SSN**, **Items**, **Hours**, **Units** and **Amount**. The Grand Totals for **Hours**, **Units** and **Amount** display on the last page. The grand totals are excluded from the 'Ms Excel (Data Only)' version of the report for easier sorting.

Prerequisite: Payroll

7. REPORT MODIFICATION.

The font size has increased on the following reports located in the *Santrax* section of the *Reports* screen.

- Unknown Staff Report
- Unknown Client Report
- Unknown Staff By Coordinator

Prerequisite: None

8. CAREGIVER REPLACEMENT REPORT.

The *VNS Replacement Report* has been renamed to the *Caregiver Replacement* report. It is now located in the *Other* section of the *Reports* screen. The report now includes a new multi-select **Payors** filter and the report's **Date From** and **Date To** filters support up to a one month date range.

Prerequisite: None

9. MODIFICATION TO THE AUTHORIZATION BLACK OUT DATES REPORT.

Updated the *Authorization Black Out Dates* report to include the following:

Filters

- Company
- Location
- Payor
- Client
- Coordinator

Columns

- Filename
- Coordinator

All columns have been reorganized for easier reference.

Prerequisite: VNSNY Payer