Santrax® Agency Management and Santrax® Payor Management 6.9.45

Release Date: Thursday, February 28, 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.

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CLIENT

1. **ADDED NEW OPTIONS TO THE NAVIGATE TO CONTEXT MENU**
   Added a new option to the **Navigate to:** context menu (opened by right-clicking) selection to allow easier access to a client's Electronic Health Record (EHR) from the *Santrax Maintenance* screen. Right click and hover over **Navigate to:** and select **Client General** to view the client's EHR or **Client Schedule** to view the client's schedule. All options selected retain the previously applied search filters.
   Prerequisite: None
2. **CLIENT CHART UPDATES.**
   Modifications were made to ensure the *Facesheet* option only displays in the *Quick Reports* section of the client's EHR.
   Prerequisite: None
3. **CLIENT SCHEDULE MODIFICATION.**
   Modifications were made to ensure when a user selects the **Show Confirmed Hrs Only** checkbox in the *Schedule* section of the client's Electronic Health Record (EHR) the value in the *Auth/Pay Diff Hrs* field correctly calculates the difference between the authorized and payroll hours.
   Prerequisite: None
4. **CREATE PERMANENT GRID BUTTON.**
   Modifications were made to ensure that when a user selects the **Create Permanent Grid** button on the *Authorizations* screen of the client's Electronic Health Record (EHR), a permanent template is populated in the *Permanent* section using the weekly limits and the agency's default start time. To utilize this functionality the checkbox, '**Show Wkly Auths w Daily Limit**s', on the *General* tab of the *System Payors* screen must be selected and users must enter the daily limit for the weekly authorization. A warning, 'The daily allocation does not match the weekly limit. Are you sure you want to save?', displays if the daily authorization amount does not equal the weekly authorization limit.
   Prerequisite: None
5. **NEW PERMANENT TEMPLATE WARNING.**
   Added a new warning message, 'Warning: Schedules were not generated. Please check client's status.', to display when a user attempts to create a permanent schedule for a client with a hold or inactive status.
   Prerequisite: None
6. **CLIENT CALENDAR MODIFICATIONS.**
   Modifications were made to ensure that the *Auth Diff* field in the *Schedule* section of the client's EHR, when using the **Show Client Calendar** checkbox, only displays if there is an authorization, if the client does not have an authorization the *Auth Diff* field does not display.
   Prerequisite: None

SCHEDULING

7. SCHEDULE VERIFICATION REPORT UPDATES.
Added new *Group By* option, 'Payor, WOS, Client' to the *Schedule Verification Report*.
Prerequisite: None

BILLING

8. CLIENT SCHEDULE PRINT MODIFICATION.
Modifications were made to ensure when a user prints a client calendar from the *Schedule* section of the client's EHR, using the **Show Client Calendar** checkbox the print-out includes all recent updates to the calendar view. The report prints what is displayed on the screen.
Prerequisite: None

9. TAKEBACK BATCH PAYMENT MODIFICATIONS.
Modifications were made to ensure a user can post a negative batch payment using manual remittance by selecting the **Batch Type** as 'TB-TakeBack' to apply negative takeback payments to the entire invoice or the individual line item.
Prerequisite: None

REPORTS

10. UPDATED ACCOUNT STATEMENT REPORT.
Added a new checkbox, **Exclude Canceled Invoices** to the *Account Statement* report in the *Billing* section of the *Reports* screen. Select this checkbox to exclude canceled invoices in the report output.
Prerequisite: None

ADMIN

11. CLIENT MERGE SCREEN MODIFICATIONS.
Updated the *Merge Clients* screen, (**Admin**>**System Tools**>**Merge Clients**) as follows:

- Added a new **Client Name Search:** field which allows the user to search clients.
- Added a new **Created By** column which identifies if the client's record was created by a user or interface.
- The **Chart ID** column now displays the full client chart id.

Prerequisite: None

GLOBAL

12. ADJUSTED TIME MODIFICATIONS.

Modifications were made to ensure users with the appropriate *Schedule: Edit Duration* security permission can edit the *Adjusted* time duration on confirmed schedules with Santrax call times attached. If there is a payer billing script, those rules take priority over changes made by the user.
Prerequisite: None

13. MODIFICATIONS TO THE HISTORIAN.

Modifications were made to ensure the *Historian* the displays 'Third Party Import' when data is change via the VNSNY Third Party Interface.
Prerequisite: VNSNY Third Party Interface