Santrax® Agency Management and Santrax® Payor Management 6.9.33

Release Date: Thursday, August 30, 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.

BILLING

1. **INVOICE PRINT ORDER MODIFICATIONS.**
   Modifications were made to ensure that when invoices are created then printed from the *Billing Review* screen they are sorted by payer and in alphabetical order by client's last name.
   Prerequisite: None

2. **837 ELECTRONIC CLAIM ICN MODIFICATIONS.**
   Modifications were made to ensure that a unique Interchange Control Number (ICN) is used, for each payer, in the ISA13/IEA02 fields on 837-5010I and 837-5010P electronic claim files.
   Prerequisite: 837-5010I/837-5010P

3. **FTP DIRECTORY FIELD MODIFICATIONS.**
   Modifications were made to ensure up to 128 characters can be entered and displayed in the **Directory** field on the *EDI Settings* tab of the *System Payor* screen.
   Prerequisite: None

4. **REMITTANCE FORMAT FUNCTIONALITY.**
   Created new functionality to allow users to indicate the appropriate 835 format for posting payments. The *EDI Settings* tab of the *System Payor* screen now includes a **Remittance Format** field. This field allows a user to select which 835 format (default is 5010) is associated with that payer. If a user attempts to import an 835 remittance file in a format other than the one specified in the **Remittance Format** field, the following error message displays: "The following payers are not set up to use <<XXX>> file format: (<<Payor Name>>)".
   Prerequisite: Electronic Remittance

5. **NEW POSTED METHOD INDICATOR.**
   Created a new **Posted Method** indicator. This indicator appears as a new field on the *Payments* screen of an invoice and as new columns on the *Payments and Credits* and *Attached Items* tabs of an invoice. These new fields/columns display **M-Manual** to indicate that a payment was posted manually and **E-Electronic** to indicate that a payment was posted electronically.
   Prerequisite: None

PAYROLL

6. **PAYROLL REVIEW MODIFICATIONS.**
   Modifications were made to ensure that the *Schedule Date* column on the *Payroll Review-CSV* export displays in date format rather than date-time format.
   Prerequisite:

7. **PAYROLL REVIEW - NEW STAFF POSITION FILTER.**
   Added a new **Position** filter to the *Payroll Review* screen. This filter allows users to limit the results based on the staff members' position.
   Prerequisite: Payroll

REPORTS

8. **AGED INVOICE REPORT MODIFICATIONS.**

Modified the logic for the aged invoices reports listed below to ensure that the results are consistent across all reports. Cancelled invoices with remaining balances are included. Invoices with a balance of zero, due to posted on account cash, are not included.

- Aged Invoices
- Aged Invoices - Detailed Extended by Payor

Prerequisite: None

GLOBAL

9. **EVENT CODE MODIFICATIONS.**

Modifications were made to ensure any active rate using a deactivated event code can be modified to use an active event code or deleted.

Prerequisite: None