Santrax® Agency Management and Santrax® Payor Management 6.9.37

Release Date: Thursday, October 25, 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. **AUTHORIZATION TAB MODIFICATIONS.**
    Added an *Authorizations* tab to the *Schedule Detail* screen, allowing users to view authorizations. Users with the correct permissions can update authorizations related to the selected client and service from this screen. Out dated or voided authorizations do not display in this tab. Double-click any authorization displayed on this tab to open the *Authorization* screen. Any changes made in the *Authorization* screen are automatically updated on the client's EHR. The following columns display on the Authorizations tab:
    - Service
    - Ref. No
    - Format
    - Max
    - Begin
    - End

    Prerequisite: None

BILLING

2. **NEW CLIENT INVOICE-BLANK HEADER_PAY_ADJS FORMAT.**
    Created a new printing format, 'Client Invoice-Blank Header_Pay_Adjs'. When selected, this format prints invoices with no header format and displays balance of the account, including payments and/or credits (adjustments) that have been applied.
    Prerequisite: None

ADMIN

3. **CLINICAL INTEGRATION MODIFICATIONS.**
    Users can select either **SPoC** or **SAM** when selecting the **Clinical Integration** checkbox on the *Service Detail* screen (**Admin** > **Services** > *Service Detail*). If neither option is selected and the user attempts to save the service ,the error message "**Please select SAM or SPoC Clinical Integration type before saving.**" displays. When a client admission uses a service for which the **Clinical Integration** type is set to **SPoC**:
    - Schedules are created and updated in SPoC.
    - New and updated SPoC schedules appear in the system.
    - Schedules are not created in the system.
    - The **Clinical Integration** type (**SPoC** or **SAM**) displays on *Service for Client* screen but is not editable.

    When a client admission uses a service for which the **Clinical Integration** type is set to **SAM**:
    - Schedules are created and updated in the system.
    - New and updated schedules are sent to SPoC.

    Prerequisite: Clinical Integration

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