Santrax® Agency Management and Santrax® Payor Management 6.9.39

Release Date: Tuesday, November 20, 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.

CLIENT

1. **MERGE CALL FROM CLIENT'S EHR.**
Users can now merge calls from the *Schedules* section of a client's Electronic Health Record (EHR). Navigate to the *Schedule* section of a client's EHR (*Client* > Select a Client > *Schedules*), right click on a schedule to open the context menu and select **Merge Calls** and follow the regular process to merge calls.
Prerequisite: None

2. **NEW SHOW CALENDAR VIEW OPTION.**
The system can now display a client's schedule in a calendar view. Select the new **Show Calendar View** checkbox, located on the client's Electronic Health Record (*General > Schedules*) to enable this view. This displays the client's schedule in a daily calendar view to allow users to easily observe the number of daily and weekly authorization hours.
Prerequisite: None

SCHEDULING

3. **ENTER ADJUSTED HOURS ON SCHEDULE DETAIL SCREEN.**
Modifications were made to ensure that users with the Maintenance permission from the Santrax section of the permissions screen can edit the **Adjusted: hrs** field on the *Times* section of the *Schedule Detail* screen.
Prerequisite: None

4. **DISPLAY BILL/PAY HOURS ON NEW EVENTS SCREEN.**
Users with the correct permissions can now enter hours instead of times when entering time sheets using the *New Events* screen. The new **Display Bill/Pay Hours on New Events screen** checkbox on the *New Events* section of the *System Settings* screen (*Admin > System Settings > Scheduling*) enables and disable this functionality.
Prerequisite: None

PAYROLL

5. **SET PAYROLL RATES BY COUNTY.**
Modifications were made to ensure users now have the ability to enter payroll rates based on the client's county and state combination. Users can add state and county rates on the *Payroll Master Rates* screen, (*Payroll > Master Rates > Payroll*) using the two new columns **State** and **County**. Enter the state format as two letter state abbreviation (example "NY"). Users must enter a rate for each service within each county. Users must select the default **Shift** 'No Shifts'. When enabled, this functionality compares the scheduled rate to the country rate and applies the larger rate. Overtime and holiday rates are calculated and applied after comparing the county rate and scheduled rate. Travel, Mileage or Car Fare special events codes are unaffected by this functionality.
Prerequisite: None