



Santrax[®] Agency Management and Santrax[®] Payor Management 6.9.41

Release Date: Thursday, December 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.

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CLIENT

1. ADDITIONAL HISTORIAN FUNCTIONALITY.

Added a Historian to the *Payor Information for Client* screen (**Client** > Search for and open EHR > **Chart (General)** > Select/Open payer). The Historian tracks all changes made to the *General, Numbers/Etc.* and *Admission Status* sections. Any payers added or deleted are included in the Historian.

Prerequisite: None

2. LIMIT WEEKLY AUTHORIZATION HOURS BY DAY.

When an authorization's **Limit By** field is 'week', new suggested daily allocations allow the user to assign the total weekly hours across the days of the week.

Enable this functionality by selecting the **Show Wky Auths w Daily Limits** checkbox (**Billing** > **Payors** > *System Payors (General)*).

Prerequisite: None

SCHEDULING

3. NEW COLUMN ADDED TO SANTRAX MAINTENANCE SCREEN.

Added a **Payer** column to the *Santrax Maintenance* screen. This column displays the client's primary/rank 1 payer. The print view of this screen was also updated to include this column.

Select the **Show Payer in Visit Maintenance** checkbox on the *System Settings* screen (**Admin** > **System Settings** > **Partners (Santax)**) to enable this functionality.

Prerequisite: None

REPORTS

4. NEW AUTHORIZATION SUMMARY REPORT FILTER.

Added a new **Coordinator** filter and *Group By* 'Coordinator' or 'Payor' options to the *Authorization Summary* report (**Reports** > **Client (Authorization Summary)**). Select a coordinator to limit the results to the selected coordinator. Select a *Group By* option to sort the results based on payor or coordinator.

Prerequisite: None

5. UPDATES TO BILLING REVIEW CSV REPORTS.

Added new, **Show Only Items OK To Bill** and **Show Only Items NOT OK To Bill** checkboxes to the *Billing Review CSV* report (**Reports** > **Billing (Billing Review CSV)**). select a checkbox to limit the results to either Ok to bill or not OK to bill items.

Prerequisite: Billing Functionality

6. NEW AGED INVOICE REPORT--CLIENT DATA--CSV.

Added a new *Aged Invoice Report--Client Data--CSV* (**Reports** > **Billing (Aged Invoice Report--Client Data--CSV)**). This CSV report is compatible with Televox and displays invoices with a remaining balance greater than \$0.00 in aging buckets. The report includes the following columns:

- Chart ID
- Patient Name

- Client Status
- Admission Type
- Invoice NO.
- Phone
- Cell Phone
- Bill to Party
- Invoice Date
- Current
- 1-30
- 31-60
- 61-90
- 91-120
- 121-180
- 181-270
- 271-365
- Over 365

Prerequisite: None

7. PAYROLL REVIEW REPORT UPDATE .

Updated the *Payroll Review* report's MS Excel (Data Only) export (**Report> Payroll(Payroll Review)**) to include all data on a single row for more efficient sorting and filtering.

Prerequisite: None

8. STAFF MAINTENANCE FILE REPORT UPDATE.

Modifications were made to ensure the *Staff Maintenance File* report's (**Reports > Payroll (Staff Maintenance File)**) **Location** filter limits the results based on **the Home Location** field located in the *General* section of the staff profile.

Prerequisite: None

9. UPDATES TO THE THIRD PARTY STAFF DEMOGRAPHIC REPORT.

The following modifications were made to the *Third Party Staff Demographic* report, (**Reports>Staff (Third Party Staff Demographics)**):

- Location maps to the staff member's location payroll ID
- Marital status uses the Federal Marital statuses on the staff profile

Prerequisite: None

10. NEW PROPOSED VS. ACTUAL TIMES W AUTH HRS REPORT.

Added a new, *Proposed Vs. Actual Times w Auth Hrs*, report **Reports> Scheduling (Proposed Vs. Actual Times w Auth Hrs)**. This report allows the user to compare a staff member's actual hours worked vs. the authorized hours.

Prerequisite: None

GLOBAL

11. UPDATE TO OASIS PPS PRICER 2019

Modifications were made to update the OASIS PPS Pricer for episodes ending on or after 1/1/2019 so that the pricer can calculate the correct PPS reimbursement rates for billing.

- Updated PPS Grouper
- Updated Access OASIS dll (scrubber)
- User can create OASIS-C and OASIS-D assessments with an end date on or after 1/1/2019
- Updated the *Zip Codes* table to match the USPS list
- Corrected existing OASIS-D wizard issues
- Added 6 new OASIS-D Assessment questions
- Modifications were made to validate OASIS-D Start of Care (SOC) and Re-certification follow up assessments to create a valid HHGR score and a HIPPS code.

Prerequisites: None