Santrax® Agency Management and Santrax® Payor Management 6.9.42

Release Date: Thursday, January 3, 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.

STAFF

1. **Staff Profile Update.**
Modifications were made to ensure when adding a new staff member, the **Department** field, in the *Payroll* section of the staff profile, will automatically populate using the default setting.
Prerequisite: None

SCHEDULING

2. **Santrax Maintenance Filter Modifications**
Modifications were made to ensure when a user changes the **Status** filter on the *Santrax Maintenance* screen, the results are correctly filtered based on the selected status.
Prerequisite: None
3. **New Show Confirmed Hrs Only Checkbox.**
Added a new checkbox, **Show Confirmed Hrs Only**, to the *Schedules* section of the client's EHR. Select this checkbox to only schedules with a status of 'Confirmed', 'In Progress', and 'Closed' when viewing a client's schedule on this screen. This checkbox is selected by default.
NOTE: This functionality is currently unavailable when using the calendar view.
Prerequisite: None
4. **Santrax Duration Editing Updates.**
Added a new checkbox, **Edit Santrax Duration on Schedule Detail**, to the *Scheduling* section of the *System Settings* screen (**Admin** > **System Settings** > **Scheduling** (*General*)). Select this checkbox and users with the appropriate *Edit Duration* permissions can edit the **Santrax hrs** and/or **Adjusted hrs** fields.
NOTE: The 'Edit Duration' permission was previously called the 'Santrax Duration' permission.
Prerequisite: None

BILLING

5. **Remittance Report Update.**
Modifications were made to ensure when a negative amount is received via the 835 file, it is correctly classified as 'Takeback' on the **Remittance Report** and automatically applied to the appropriate invoice. Any negative amount that cannot be identified as a takeback is classified as 'Unknown'.
Prerequisite: None

REPORTS

6. ACTIVE CLIENT ROSTER REPORT MODIFICATIONS.

Updated the *Active Client Roster* report to allow users to limit results based on whether or not a client uses clinical integration. Added the following filter to the report for agencies configured for clinical integration:

- **Is Client Clinically Integrated** - this filter is blank by default. Select 'Yes' and the report output displays clients use clinical integration. Select 'No' and the report output displays clients that do not use clinical integration. When left blank, the report output includes all clients.

Added the following columns to the report output:

- **Clinically Integrated** - The value in this column is either 'Yes' or 'No'.
- **Clinical Integration Effective Date**

Prerequisite: None

7. NEW AND CHANGED AUTHORIZATION REPORT MODIFICATIONS.

Renamed the *Changed Authorization* report to *New and Changed Authorizations* report. Updated the report’s excel (data only) output to display each change to an authorization as its own row. Added the following new columns to the report's excel output:

- Payer
- Customer No.
- MR Number
- Auth Begin
- Auth End
- Field Changed - The value in this field identifies which field was changed on the authorization

Prerequisite: None

GLOBAL

8. 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)

Prerequisite: None

9. OASIS-D VALIDATION MODIFICATIONS.

Modifications were made to ensure that when a user enters "- Not Assessed" for GG0170Q, the associated questions GG0170R, GG0170RR1, GG0170S and GG0170SS1 are also automatically marked as "- Not Assessed".

Prerequisite: None