Santrax® Agency Management and Santrax® Payor Management 6.9.52

Release Date: Thursday, June 6, 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.

REPORTS

1. **Billing Review CSV Report Update.**
   The *Billing Review CSV* report correctly displays the name of the coordinator assigned to clients. The field is left blank if the client does not have an assigned coordinator.
   Prerequisite: None
2. **Cash and Adjustment Receipts-Summary and Cash and Adjustment Receipts-Detail CSV Report Filter Update.**
   The following changes were made to the **Cash and Adjustment Receipts-Summary** and **Cash and Adjustment Receipts-Detail CSV** reports filters.
   - Check/Ref No. is changed to **Check Number(s)**. This filter is now a text entry field. Users can enter one or multiple check number(s) separated by a comma.
   - Date From is changed to **Pmt/Adj. Date From**
   - Date To is changed to **Pmt/Adj. Date To**

   Prerequisite: None
3. **Visit Call Type Information Report.**
   The *Visit Call Type Information* report correctly identifies if a schedule was auto confirmed or manually confirmed when the Electronic Visit Verification (EVV) exceptions are enabled in the *System Settings* menu.
   Prerequisite: None