Santrax® Agency Management and Santrax® Payor Management 6.9.47

Release Date: Thursday, March 28, 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.

CLIENT

1. **CALENDAR VIEW MODIFICATIONS.**
Modifications were made to the calendar view in the *Schedule* section on a client's Electronic Health Record (EHR) to now display the StxID, Staff ID and the phone numbers of the client when the user hovers on a schedule.
Prerequisite: None

2. **CLIENT MERGE MODIFICATIONS.**
Modifications were made to ensure when a user merges a client record received via interface, with an existing temporary client's record, the *Attributes* merge and any additional attributes are copied to the record received via interface.
Prerequisite: None

SCHEDULING

3. **SANTRAX MAINTENANCE SCREEN MODIFICATIONS.**
Added blue double arrows to the top left corner on the *Santrax Maintenance* screen. Click the arrows to hide/unhide the *Search Filters* section of the screen.
Prerequisite: None

4. **NEW CALL LOG FEATURE.**
Added a new feature in the *Call Log* tab on the *Schedule Detail* screen to display the call in/out GPS coordinates, the client's primary GPS coordinates and distance difference when the user hovers over the MVV call log icon.
Prerequisite: None

REPORTS

5. **SCHEDULE VERIFICATION REPORT UPDATE.**
Updates were made to the *Schedule Verification Report* to ensure the report output excludes special event codes for Travel Time, Carfare and Mileage and displays accurate scheduled hours.
Prerequisite: None

6. **CALENDAR BY CLIENT REPORT UPDATES.**
Updates were made to the *Calendar by Client* report to ensure a user can run the report for no more than 31 day. A warning "Date range must be 31 days or less" displays if the date range exceeds 31 days. The report also generates faster.
Prerequisite: None

7. **CALENDAR BY STAFF AND STAFF CALENDAR REPORTS UPDATES.**
Added a new footer on the *Calendar by Staff* and *Staff Calendar* reports display the *Client ID*, *Service*, *Client* last name, first name, *Address*, *City*, *State* and client's *Phone* for staff reference.
Prerequisite: None

Proprietary and Confidential. Copyright © 2019 Sandata Technologies, LLC. All rights reserved
Universal Release Notes
Release: 6.9.47
3/28/2019
Page 2 of 3

Sandata

ADMIN

8. **MERGE CLIENTS SCREEN MODIFICATIONS.**
Modifications were made to the *Merge Clients* screen to eliminate the horizontal scroll bar. Added color blocks to the left in the first column to identify the client's admission status.
Prerequisite: None