



# Santrax<sup>®</sup> Agency Management and Santrax<sup>®</sup> Payor Management 6.9.26

Release Date: Thursday, May 24, 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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## BILLING

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**1. PAYMENT SCREEN MODIFICATIONS.**

Modifications were made to ensure the *Historian* on the *Payments* screen includes all changes and identifies which staff member made the change.

**Prerequisite:** None

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## REPORTS

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**2. NON-COMPLIANT STAFF REPORT MODIFICATIONS.**

The **Attend Date** column on the *Non-Compliant Staff* report displays no data if the date precedes the staff member's rehire date.

**Prerequisite:** None

**3. NON-COMPLIANT MAIL MERGE REPORT CHANGES.**

The following updates were incorporated in the *Non-Compliant Mail Merge* report.

- The date filter changed to a **Status Effective Date From** and **Status Effective Date To** filters.
- Added **Language**, **Staff Status** and **Status Reason** columns.
- Changed the format used for the **Hire Date** and **Termination Date** columns to mm/dd/yyyy.

**Prerequisite:** None

**4. CANCELLED EVENTS BY REASON REPORT MODIFICATIONS.**

The *Cancelled Events by Reason* report now includes the cancellation reason and related notes in the **Notes** column. When there is no cancellation note, the Schedule Detail note will show in its place if applicable.

**Prerequisite:** None

**5. BILLING REVIEW MODIFICATIONS.**

Modifications were made to ensure that when hold split shift billing is enabled, all applicable (or schedules with a status of Hold) schedules are categorized as 'Not OK to Bill' and are not billed until resolved, when hold split shift billing is enabled.

**Prerequisite:** Hold Split Shift Billing Functionality

**6. CASH AND ADJUSTMENT DETAIL CSV REPORT MODIFICATIONS.**

A new column, **Orig Invoice Date**, was added to the *Cash and Adjustment Detail CSV* report.

**Prerequisite:** None