Santrax® Agency Management and Santrax® Payor Management 6.9.34

Release Date: Thursday, September 13, 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.

Staff **2**
Reports **2**

STAFF

1. **STAFF SEARCH MODIFICATIONS.**
   Users may search for staff records using the **Agency ID** field on the *Staff Search* screen without entering the leading zeroes.
   Prerequisite: None
2. **MVV USER CHECKBOX MODIFICATIONS.**
   Selecting the **MVV User** checkbox on *System Login Privileges* section of a staff member's profile (**Staff** > Select a staff member > **Security**) now disables the **This Staff Member can log into the System as a User** and the **This User is a System Administrator** checkboxes.
   NOTE:
   If an agency requires a staff member to be both a system user and an MVV user, they must create a separate staff profile for each role.
   Prerequisite: MVV

REPORTS

3. **SANTRAX NO SHOWS- BY COORDINATOR REPORT MODIFICATIONS.**
   Added a new checkbox, **Include GPS Exceptions**, to the *Filters* section of the **Santrax No Shows- By Coordinator** report. When this checkbox is selected, the report output displays an asterisk (*) next to a client's name to indicate that a GPS distance exception occurred during that visit. For the data only view of the output, modifications were made to ensure that:
   - Column headers display over the correct columns.
   - A **Coordinator** column displays on the report output so users can filter by Coordinator.
   - The report output is no longer grouped by coordinator and the sub totals row was removed.

   Prerequisite: None
4. **CLIENT HEALTH ASSESSMENT REPORT MODIFICATIONS.**
   Added the following fields to the **Client Health Assessment Report**
   - **Client ID**
   - **Client MRN**
   - **Customer Number**
   - **Primary Diagnosis**
   - **Client DOB**
   - **Client Coordinator**
   - **Clinical Manager**
   - **Staff ID**

   Prerequisite: None

5. AGED INVOICE REPORT MODIFICATIONS.

Modified the logic for the aged invoices reports listed below to ensure that the results are consistent across all reports. Cancelled invoices with remaining balances are included. Invoices with a balance of zero, due to posted on account cash, are not included.

- Aged Invoice- Summary
- Aged Invoices- Summary to 150
- Aged Invoices- Summary to 365

Prerequisite: None