



# Santrax<sup>®</sup> Agency Management and Santrax<sup>®</sup> Payor Management 6.9.46

Release Date: Thursday, March 14, 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 ..... 2**
- Staff ..... 2**
- Scheduling..... 2**
- Reports ..... 2**



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## CLIENT

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### 1. AUTHORIZATION WARNING MESSAGE MODIFICATIONS.

Modifications were made to ensure users cannot delete a shared authorization attached to an invoice. If a user attempts to delete a shared authorization a warning message "Cannot delete authorization that is attached to an invoice." displays.

**Prerequisite:** None

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## STAFF

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### 2. INCREASE STAFF USERNAME FIELD'S CHARACTER LIMIT.

The *Username* field in the *Security* section of the staff profile now supports up to 64 characters.

**Prerequisite:** None

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## SCHEDULING

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### 3. SANDATA MOBILE CONNECT GPS UPDATES.

Added new GPS functionality for visits using MVV and SMC for visit verification. It is accessed from the *Santrax Maintenance* screen by selecting a visit and right-clicking to access the context menu. The map displays a pin to show the client's primary address, the visit's call in and call out. The call related pins are green when within the distance tolerance threshold of the client's primary address and red when outside the threshold.

**Prerequisite:** Sandata Mobile Connect, Mobile Visit Verification

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## REPORTS

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### 4. THIRD PARTY AUTHORIZATION TRANSACTIONS FILTER.

Added a new multi-select filter, **Exception Message**, to the *Third Party Authorization Transactions* report. The exception message selected limits the report output based on the authorization import exceptions as defined by the third-party payer.

**Prerequisite:** VNSNY Third Party Interface

### 5. THIRD PARTY CAREGIVER EXCEPTIONS REPORT UPDATES.

Added the following new filters to the *Third Party Caregiver Exceptions* report to limit the report output.  
New Filters:

- **Company**
- **Coordinator**
- **Staff**
- **Import Status**

**Prerequisite:** VNSNY Third Party Interface

**6. THIRD PARTY DEMOGRAPHIC TRANSACTIONS REPORT UPDATE.**

Added a new multi-select filter, **Error Description**, to the *Third Party Demographic Transactions* report. The error description selected limits the report output based on the demographic import exceptions as defined by the third-party interface.

**Prerequisite:** VNSNY Third Party Interface

**7. AUTHORIZATION REQUESTS REPORT UPDATE.**

Added a new check box, **Show Clients with No Authorization**, on the *Authorization Requests* report to include clients without authorizations. Clients with no authorization are indicated by an 'X' in a new column *No Auth* on the report output.

**Prerequisite:** None