



Santrax[®] Agency Management and Santrax[®] Payor Management 6.9.53

Release Date: Thursday, June 20, 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.

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CLIENT

1. SERVICE MASS EDIT UPDATE.

The mass edit functionality can now also be used to mass edit the schedules' service from the schedules section of the client's profile (**Client > Schedules**).

Prerequisite: None

SCHEDULING

2. ADMISSIONS PAYORS HISTORY TAB UPDATE.

Users with the appropriate security permissions now have the ability to update the following fields in the *Admission Payer History* tab on an invoice.

- Cust. No
- MedicaidID
- Group No
- Referral No

Users can then resubmit all applicable updated invoices. The client's customer number must also be updated on the admission in order for all future invoices to include the updated information.

Prerequisite: None

3. ADDING MORE THAN ONE CLIENT /STAFF TO A SCHEDULE.

Users can no longer add more than one staff member or client, to a schedule. Functionality to change a staff or client by removing the current staff or client and then clicking the **Add** button is retained.

Prerequisite: None

REPORTS

4. NEW MOBILE USER REPORT.

Added a new report, *Mobile Users Report (Reports>Other)*, to display staff data for all staff members flagged as mobile users.

Prerequisite: None

5. NON-COMPLIANT STAFF REPORT MODIFICATION.

Modifications were made to the *Non-Compliant Staff* report to include the mobile phone number in the *Mobile Phone* column.

Prerequisite: None

GLOBAL

6. CALL PROCESSING FOR CONSECUTIVE SCHEDULES.

Renamed the 'Allow Split Payer/Service Calls' checkbox to **Call Processing for Consecutive Schedules** in the *Santrax* tab on the *System Settings* screen.

Prerequisite: None