



Santrax[®] Agency Management and Santrax[®] Payer Management 6.9.56

Release Date: Thursday, August 1, 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
Reports	2
Security	2

CLIENT

1. NEW TIMESHEET CLIENT DOCUMENT.

Created a new *Timesheet* document in the *Document* section of the client's Electronic Health Record (EHR). Use this document to upload a staff member's time sheet that is associated with the client. In the *Schedule Detail* screen users can right-click and select **Client Document** to quickly navigate to the *Document* section of the client's EHR.

Prerequisite: Blue Care Tennessee Payer

REPORTS

2. ACTIVITY REPORT BY CLIENT/SUMMARY REPORT UPDATE.

The *Activity Report By Client* or *By Summary* can now be **Grouped By** the *Location - Client- Service* to include the location, client and service. Each location grouping displays the location's sub-totals for the clients within that location. Only locations with clients are displayed in the report.

Prerequisite: None

3. MOBILE USERS REPORT UPDATE.

Added a new multi-select filter, **Location**, to the *Mobile Users Report* to display staff members with the type of mobile app used by location.

Prerequisite: Mobile Visit Verification, Sandata Mobile Connect.

4. NEW THIRD PARTY PLAN OF CARE IMPORT REPORT.

Created a new, *Third Party Plan of Care Import*, report to display changes made to the plan of care for clients. The report output displays the following:

- Client Last Name
- Client First Name
- Client ID
- Begin Date
- End Date
- Location
- Clinical Manager
- Team
- Tasks
- Date Imported
- File Name
- Plan Comment

Prerequisite: Third Party Interface

5. SANTRAX - INDIVIDUAL PLAN OF CARE AND SANTRAX - PLAN OF CARE EXCEPTION REPORT UPDATES.

Added a new filter, **Client**, to the *Santrax - Individual Plan of Care* and *Santrax - Plan of Care Exception* report.

Prerequisite: None

SECURITY

6. PLAN OF CARE PERMISSION.

Modifications were made to ensure when a user with admin Plan of Care permission attempts to modify a client's plan of care the warning message, "Warning: This Plan of Care is associated with previous schedules and modifications could cause exceptions because of tasks already performed. Are you sure you want to proceed with these changes? If No, please create a new Plan of Care with a new effective date?" appears to further confirm the changes. Any Plan of Care sent via third-party interface cannot be modified even if the user has the admin Plan of Care permission.

Prerequisite: Plan of Care Permission