Release v3.6

Section	Feature	Details
Billing	A/R Download	Added the bill method; denial reason code & last note to the A/R download
Billing	Pending Invoices/Claims	Added direct access access to client profile and calendar assignment from pending invoice/claim page
Calendar	Eligibility	User will be warned at create & verify if patient is ineligible on that date if last response was ineligible
Calendar	Client Tab	If client email exists will be visible & clickable in calendar client tab and client view page
Calendar	Status Filter	Added new assignment status of billed to assignment status drop down options
Client	Care Team	Physician Specialty will be visible in client chart if added to a Physician Details tab
Client	Jump To	Updated Jump To Client field to list format displaying all options
Client	Therapy Assess	Comments from routine visit goal progress added to the (i) with other goal markers
Client	Care Team	Client Contacts & Physician tabs replaced with Care Team to include all parties involved in client care
Client	Care Team	New care team roles per service: Intake; Marketer; Live-In Caregiver; Lead Therapist, RN Care Manager; Therapy Asst
Client Care Team	Live-In Exclusion	User may be added to client care team role: Live-In Exclusion; will exclude EVV requirements for assignments/billing
Client Intake	Diagnosis Codes	Diagnosis codes may now be added at Intake & Client Service Details
Client Intake	Patient Details	Added new multi-select patient details field in quick intake/client profile for tracking specific items
Client Intake	Member ID	Added Insured Member ID at intake for selected payer so that eligibility may be run
Client Intake	Intake Process	Updated buttons to clearly define Save as Referral, Accept Patient, Decline Referral

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Section	Feature	Details
Client Intake	Intake Process	Once a referral is saved all client data may be entered to continue Intake process without yet accepting client
Client Other Docs	Other Doc Forms	Non-clinical forms may now be created from client - chart - other documents page
Client Reports	Open Shift Report	New client report: Open Shift Report
Client Reports	All Reports	Medical Record Number column added to all client reporting
Client Svc Details	Diagnosis Codes	Diagnosis codes edited in service details will populate in assess; changes made in assess will update service details
Company	Eligibility	Eligibility automation to send and receive response files from Waystar (requires add'l Waystar access prior to activation)
Employee	Jump To	Updated Jump To Employee field to list format displaying all options
Employee Docs	Other Doc Forms	Non-clinical forms may now be created from employee - documents page
Fax	Fax Filtering	Added date sent & the ability to filter by date to search faxes
Permissions	Roles	Roles for client care team added to permissions: Care/Admin Manager, Intake Coordinator, Marketer