Advisor 2023.1 What's New

Billing / Receivables

Ticket Nbr	What's New
77,158	The 835 payment file has been updated so that it can be applied via the Apply Payments window in Advisor.
87,473	View Billing: The payment Status field on the detail tab can now be changed if security permissions are met AND the claim doesn't have a status of Unpaid. Users can change the status between Partial/Closed, Partial/Open, and Paid-In-Full.
94,294	Create Transmission Files: The 837i file has been updated to match recent requirement changes for ICF billing.

Day Services

Ticket Nbr	What's New
83,315	Create Transmission Files: Files created out of this window will now have the correct ratio for STEP services.

eMar

Ticket Nbr	What's New
96,748	Edit Consumers: The process that sends consumer demographic information to SimpleMAR has been updated to prevent duplicate resident insertion in SimpleMAR.

Incident Tracking

Ticket Nbr	What's New
90,671	Reports: A new report has been added that totals and displays the number of specific injuries documented by month.

Incident Tracking - Anywhere

Ticket Nbr	What's New
95,646	Incidents that have not been viewed by the user will now show with bold text on the Incident Tracking widget in the Dashboard as well as the Review Incidents page in the Incident Tracking module. Please note that when you upgrade and see this new feature, all existing incidents will show as bold.

Plan - Anywhere

Ticket Nbr	What's New
93,954	Documents and attachments can now be sent to DODD when the plan is sent. When users click the SEND TO DODD button, users will be able to select which attachments to send along with the plan. Users should select any document/attachment that needs to go to DODD with the plan even if the same document/attachment was sent previously.
94,246	The guardian assigned to the consumer at Salesforce can now be assigned as a team member to the plan. When saving a team member to the plan that is a type of Guardian or Parent/Guardian, we will present you with the name of the current guardian assigned to the consumer at DODD. If there is a matching guardian(s) in the Gatekeeper/Advisor database, the user can select them to add as a team member.
94,532	Users will no longer be asked if they'd like to save the plan while on the Assessment tab. Instead, users will be notified that the assessment has saved automatically when moving away from the Assessment tab.
94,805	A new Signature Date field has been added to the Signature form for In-Person signatures. The user is required to provide this when saving the signature.
95,092	Team member rows on the Sign/Consent tab that have a signature type of No Signature Required will now always show in white.
95,935	We have updated the Signatures grid on the Plan reports so that it says "No Signature Required" in the signature field if that team member doesn't require a signature to be captured.
95,960	We have added the ability to update dates for multiple paid support records at once. To do so, click on the new Multi Select Supports at the bottom of the Paid Supports grid, select the records in the grid you'd like to change the dates for, then click the Update button also found at the bottom of the grid.

95,962	Users can now clear out any values selected via the Yes/No radio buttons on the Assessment tab! Do this by clicking the 'X' icon next to the radio buttons.
95,963	Users can now change a plan from a revision to an annual and vice-versa. To do this, click on the Change Plan Type button found in the More menu (the same menu you access to print your plans).
96,176	We have updated the Additional Supports grid so that the Frequency now shows in its own column. Also, we have corrected an issue that was causing only the first 50 characters of the When/How Often Other value to show instead of the entire value.
96,501	We have changed the Status label in the Contact Information grid to Marital Status.
96,741	We have updated the Outcomes section of the Plan reports so that the information is more clear.
96,794	We have adjusted the layout of the Known and Likely Risks grid on the plan reports in an attempt to save as much space as possible.
96,795	We have squashed a bug that was preventing Additional Supports and Professional Referrals from being deleted.
96,836	We have corrected issues on the Sign/Consent tab that prevented users from correctly updating existing records found in the grid on this tab.
96,842	We have updated the Additional Supports grid on the Service tab of the ISP so that it will always show the entire value in the last column.
96,852	We squashed a bug that was causing Salesforce ID values to be overwritten in the database.
96,855	SSA/QIDP case loads can now be assigned and posted to DODD via Anywhere! To do this, click on the Assign QIDP button in Advisor or the Assign Case Load button in Gatekeeper on the page that shows after selecting a consumer in the Plan module. Users must have the Assign Case Load security key to see this button.
97,067	We have corrected an issue that was preventing plans from uploading to DODD due to special characters found in the Communication Chart of the Assessment.
98,260	We have resolved an issue that was causing digital signatures to show for team members that have a signature type of In-Person on the plan reports.

Scheduling - Anywhere

Ticket Nbr	What's New
97,089	We have corrected an issue that prevented users from approving time off requests in the Approve Requests page of the Scheduling module.

Single Entry

Ticket Nbr	What's New
90,917	Single-Entry Guide: Remote Monitoring can now be billed out of Single-Entry. To do this successfully, work codes will need to be setup specifically for remote monitoring services. Also, a Service Type of Remote Monitoring will need to be selected for these work codes in the Work Codes window.
95,428	Single-Entry Guide: The PALS single-entry payroll export has been updated to support locations with mixed services, HPC & OSOC and behavioral & non-behavioral.

Single Entry - Anywhere

Ticket Nbr	What's New
71,522	We have updated the Time Approval page to include the date and time the status of a record has changed as well as the user who made the change. This information will also be available when the record is opened. Here is a summary of what will display; Status Pending (P) - nothing will display Status Awaiting Approval (A) - will display the user who submitted the record for approval and when they submitted it. Status Approved (S) - will display user who approved the record and when it was approved. Status Rejected (R) - will display user who rejected the record and when it was rejected. Status Imported (I) - will display user who approved the record and when it was approved. Status Duplicate (D) - will display user who approved the record and when it was approved.
97,739	Corrected a bug that was causing hours to show incorrectly in the Time Review window.

Transportation

Ticket Nbr	What's New
95,988	Reports: The "Day Service and Anywhere Non-Medical Transportation Comparison" report now correctly counts the number of trips a consumer had each day.