

# Release Notes for eXPRS

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*Release Notes contain a brief description of new features or enhancements, as well as fixes to previously identified issues. Please review the Help menu documents for additional information on using eXPRS (How To guides, Troubleshooting documents, etc.).*

*NOTE: Some tasks are relevant to all users, while others pertain only to a certain role, or level of users (i.e., State roles/users versus Local Authority roles/users versus Provider roles/users).*

**03/12/2024 – v2024.1**

## **Authorizations:**

- Added logic to prevent an NTE rate from being entered if it is below the Minimum Rate on the Rate Table. (152099)

## **Claims and RFFS Claims:**

- Added processing to the Claim Aggregation Cycle that will process voided Claims in certain cases. (125585)
- Added the Claim Modifier of MOE to the system. Made this new modifier visible on multiple pages, including the Claims View and Claim Search Page. (175733)

## **Plan of Care:**

- Resolved an issue preventing users from viewing a Plan of Care after a CME Transfer (171596)
- Changes were made to how Authorized Monthly Hours read and validate against the Service Group Limit table. (182867)

## **Provider:**

- The PSW Hours Worked Banner language has been updated. (180817, 190990)

## **Reports:**

- The Payment PLA Detail Report only displays results for the contract used in the search criteria. (66489)
- When searching for In Home Hour Add Ons using the the View Add On Report, the results will now return only one record, regardless of

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the number of SPAs on the Plan of Care impacted by that Add On.  
(171615)

## **Service Delivered Billing Entry:**

- Added processing to the Claim Aggregation Cycle that allows SDs billed up to the SG Limit to be assigned the Modifier Reason of REG, and SDs billed above that limit up to the Maintenance of Effort Add On Limit. (175726)
- Added the SD Modifier of MOE to the system. Made this new modifier visible on multiple pages, including the Service Delivered Detail View and the View Service Delivered page. (175733)
- Added processing to allow the system to automatically identify and assign the MOE SD Modifier Reason when an SD is submitted for approval. (175734)

## **System Services:**

- Updated language and spelling on specific POC pages. (183555)
- Improved processing around Service Group and hours data. (182864)
- Added specific OIS Staff to email distribution lists. (183600)
- Updated FMAS Transmission File w/information needed to send files to PPL after SFMA runs. (184434)
- Modified code used to pull Service Group and Hours Limits. (184722)
- Resolved an issue where Holiday Pay was not correctly calculating for some Daily Services. (185038)
- Updates to Tables and Indexes for 2024.1 (185169, 185473)
- Updates made to Help Menu and Flyouts. (186676)
- Added Service Determination Rules for MOE ARPA Funding into eXPRS via a script. (187708)
- Updated Schedule SQL to initialize lower environment defaults (187831)
- Effective date for processing MOE Claims set to 1/1/2024 (191011)

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12/14/2023 – v2023.5

## **Claims and RFFS Claims:**

- Claims are now created correctly for services that have a Rate Add On that starts or ends in the middle of a month. (177072)

## **Individual**

- Fixed an issue related to certain questions on the ONA. (46607)
- Renamed, updated or relocated fields on the ONA > Assessment and Demographic Information section to help identify ONAs completed by a Certified Assessor VS. a Service Coordinator or Personal Agent. These changes will also support a future enhancement that will allow users to search for ONAs by a specific assessor and will improve accuracy in reporting and tracking of Milestone and 5-Year ONAs. (148899)

## **Plan of Care:**

- One Day add-ons that start on the first day of an individual's Plan of Care now display on the plan. (146360)
- Modules for creating and searching for Due Process Records have been added to eXPRS. A new section named Due Process has been added to the Plan of Care > Plan Overview tab where an individual's Due Process Record will appear. (24688)
- A new add-on type has been added for Maintenance of Effort. This Add On Type is listed as MOE in the Add On > Service Type dropdown. (175713)
- Add ons with a Start date in the future (but where no POC exists that contains that Start Date) will now display on the currently effective POC. These add ons will be highlighted gray until a POC is created that includes the Add On Start Date. (175715)
- OR502/ZE, OR526/ZE and OR542/ZE no longer incorrectly draw down hours from an individual's Monthly Hours Limit. (180442)

## **Provider:**

- Fixed an issue which prevented some state staff from entering retroactive bed capacity changes in certain cases. (143654)
- Per the 2023-25 Collective Bargaining Agreement, effective 1/1/2024 PSW Providers now are able to work up to 60 hours per week without

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an exception. Their Provider Records will reflect this change in the PSW Weekly Hours Section (177361)

## **Reports:**

- A new report was created for finding an individual's Service Group changes. The report displays information related to the individual's service group and hours limits, and shows whether the hours currently entered are in compliance after a change in an individual's service group. (152649)

## **Service Delivered Billing Entry**

- A new status of Submitted has been added for SDs to help with processing times. This new status prevents issues where the same SD can be submitted multiple times, resulting in denials. (175097)
- Resolved an issue where some Residential Providers were able to bill beyond 344 days of service in a single calendar year. (177925)

## **System Services:**

- Fixed an issue that would occur on some user action logs when there are null values in in the Old and New Columns (65188)
- Fixed an issue where the Claim Batch Status would differ from the Status field on the Claim Batch Process View page. (148393)
- Updates were made to align the Baseline database scripts with Production related to Provider Training Tracking. (175975)
- CLA server changes were manually rolled into this release to avoid a merge to Maven. (177612)
- New Release Notes, Guides and Videos were uploaded to the Help Menu. (163422)
- Additional PERC Codes were added to the PERC Code Dropdown, allowing funding rules to be created using the new codes. (168613)
- Added the 2024 partitions to the three partitioned tables for inclusion to the DB2 baseline. (168769)
- Changes made to improve processing and notifications related to the Claim Batch process. (170978)
- Database Updates to Tables (148861)
- Batch Jobs created by entering retroactive Add Ons now automatically run immediately after creation. (65371)

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- Updated the various Funding Rules pages used to View, Create, Update, or Search for funding rules. Added extra funding rule qualifiers of Provider Category, Provider Type & Specialty, and Claim Type to these pages. Made similar changes to the Mass Adjustment page. (131394)
- Modified Code for generating ETL3 File for PPL. (181000)
- Resolved an issue with the Overtime Production run for 10/24/2023. (179619)

**09/28/2023 – v2023.4**

## **Claims and RFFS Claims:**

- Processing for Trust Claims has been adjusted to allow eXPRS to pay more than 2 trusts at one time. Other improvements related to Rates and Trust processing have also been made. (40976, 67788)
- An issue which caused SDs to aggregate into claims incorrectly due to changes in an individual's Service Group History has now been fixed. (145614)

## **Individual**

- Fixed an issue that affects the Service Group History Table when an ONA Submit Date is after the Expiration Date. (155944)

## **Plan of Care:**

- The Plan Overview tab has a new Services section which gives a visual summary (in a table) of the services authorized on all tabs of the POC. Buttons on this table can be used to navigate directly to the tab of the service. (40854)
- Added validations to ensure that In-home hour Add Ons start on the first day of the month and end on the last day of the month (or the last day of the Plan of Care). (170828)
- Code has been added to allow In-Home Hours to validate against an individual's ONA Service Group. This will be activated at a future date, and more information will be shared at that time. (170288)

## **Provider:**

- The PSW Hours Worked Banner now displays correctly for a PSW with expired credentials. (171250)

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## **Service Delivered Billing Entry**

- Fixed an issue where SDs would Deny for exceeding the number of allowed billing units when a user submits SDs multiple times. (167100)

## **System Services:**

- An issue with the Timestamp field in some Action Logs has been fixed. (130532)
- Adjustments were made to the Rate Ranking system to improve accuracy of rate determination. (147227)
- Database Updates to support functionality in v2023.4 (148860)
- Adjusted processing involved for creating the Magnacare File. (157755)
- Removed access to the Create Claim process from the State POC Super User Role, resolving an Application error. (161861)
- New Release Notes, Guides and Videos were uploaded to the Help Menu, and some broken hyperlinks were corrected (163420, 173514)
- Updated the eXPRS Average Rate Calculation to align with the Mainframe APD Average Rate Calculation. (165045)
- Database downtime functionality changed to allow for testing in other eXPRS Environments. (165594)
- Updated the Mainframe Download Job and refactored the code used to detect new records on the Mainframe Shared table. (167361)

**07/31/2023 – v2023.3**

## **Authorizations**

- Added the ZC Modifier to OR526 Services. This allows a CME to create an authorization for an Agency Provider to send both staff to deliver 2:1 Attendant Care to an individual. (133966)
- Validations related to the process of Splitting SPAs have been updated to improve the workflow. (135023)

## **Claims and RFFS Claims:**

- Corrected an Application Error upon Claim Submission so that a Claims Exception is provided instead of an Application Error. (154861)

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- Fixed an issue where some claims could be needlessly reprocessed when an Add On's End Date was changed. (160341)

## **Plan of Care:**

- Fixed a display issue where an unsaved add-on would display beneath the action buttons on the Plan of Care. (150346)
- Reduced the number of steps needed to create a new Plan of Care by eliminating unnecessary clicks. (157911)
- Voiding a Pending Rate Add On no longer creates an unnecessary system job. (164824)
- Implemented validations and changes to prepare eXPRS for changes to how In-home Hours will be entered onto Plans of Care beginning on 1/1/2024. (39169)
- Users with the appropriate permissions will be able to create and submit Add Ons for additional hours above the Monthly Assessed Hour Limit in the Plan of Care. Plan Lines and SPAs for applicable procedure codes will reconcile against the Monthly Assessed Hour Limit plus the Hourly Unit Add Ons. Rate Add Ons can also be applied to OR502, OR526, and OR542. (39173)

## **Provider:**

- Fixed an Application Error that would occur for some users who are both a DSP and a PSW. (165625)
- Fixed an error that occurred in the background when a Behavioral Consultant would log into the system. (165649)
- Fixed an issue where the PSW Weekly Hours Limit Banner would display the incorrect hour limit in certain circumstances. (166909)
- In accordance with the Collective Bargaining Agreement, eXPRS implemented system processing to pay PSW providers Holiday Pay for up to eight (8) hours worked on the following 2023 holidays: Fourth of July, Thanksgiving Day, and Christmas Day. (132435)

## **Service Delivered Billing Entry**

- Resolved an issue where Residential SDs for SE50, 142 and 152 would go to Suspended status for the 344 day rule incorrectly in certain circumstances. (162277)

## **System Services:**

(The task numbers are in parentheses.)

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- Fixed an issue with error handling in the Provider Training and Tracking process. (162186)
- Added coding to allow manually entered Provider Liabilities to collect PLO/Tax2. (164674)
- Fixed an issue with the Mainframe Hours Download process. (164677)
- Corrected the Mainframe Hours Update Process so that the Last Success Date is not correct. (165602)
- The Database Backup time for the Simulation Environment has been changed from 2:00PM to 2:00AM. (166649)
- A validation message has been added to the Service Rate > Rate field to ensure rates are entered correctly. (114124)
- Fixed an issue with Tax claims related to Daily Services that crossed limit boundaries. (125615)
- The Claims Aggregation Cycle now corrects claims involving OR507 SDs. (168569)
- New Release Notes, Guides and Videos were uploaded to the Help Menu. (139428, 139444, 170908)
- Multiple tasks completed as part of the work to set up an Integrated Development Environment. (140384)
- Updates to the eXPRS Database to support new functionality in this release. (143219)
- Java Code Formatting. (167067)

**05/25/2023 – v2023.2**

## **Authorizations**

- When creating a Provider Prior Authorization for SE248, the Svc Modifier Cd CII is now available. (150143)
- Limited the SPA Search Results Page to 20,000 results to improve performance. (66388)

## **Claims and RFFS Claims:**

- The Provider Liability Edit page now allows users to edit the page after receiving an error. (34754)

## **Plan of Care:**

(The task numbers are in parentheses.)



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- Fixed a display issue where Add On rows would appear to duplicate when opened in View Mode, and would prevent State users from editing the Add On row. (129030)
- Created new permissions allowing specific State Users to Edit fields on an Approved Add On (such as the Amount or End Date) and also to Void Approved Add Ons. Claims that are impacted by staff taking these actions will be reprocessed as necessary. (67713)

## **Provider:**

- A new feature has been added for state staff to indicate whether a Provider's Service Delivered Billing Entries must be reviewed and approved by the authorizing CME. (25099)

## **Service Delivered Billing Entry**

- The Agency SD Import process has been updated to allow the import of Mileage SDs billed against OR004 WD/WE & OR005 WD/WE. (39166)
- Resolved an issue with SD Batch Import when files were submitted without a Service Element. (143881)
- A Reset button has been added to the SD Import Page. A new field has been added to the View Service Delivered page indicating whether an SD was created using this process. (130083)
- Fixed an issue where duplicate SDs would be created upon submission. (137623)
- Added concurrency checks to the creation of SDs. (161208)
- Foster Care providers will no longer see the Create Service Delivered Entries from Multiple Service Authorizations option, which does not have been removed from the flyout menu. (134665)

## **System Services:**

- New Release Notes, guides and videos were uploaded to the Help Menu. A new section for CME Eligibility guides has been added. (139427, 139442)
- Test environment setting changes to support test efforts. (149720)
- Users will now see a message on the eXPRS Login page notifying them when the system is unavailable for maintenance. (147081)
- Created a batch process to automatically reprocess claims that are impacted by a manually entered Rate Change. (39785)

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- Updates to the eXPRS Database to support new functionality in this release (143218)
- A notification alerting PSWs of the number of hours they have worked for the current workweek (Sunday-Saturday) will now appear on the eXPRS Mobile-EVV Login page. The same notification will appear on most pages for a PSW working in the Desktop version of eXPRS. (40969)
- Fixed an issue with Ancillary Claims in eXPRS Test Environments. (154861)
- Converted a query related to Title XIX Eligibility which previously used a federated table to now connect directly to the Mainframe, resulting in improved performance. (131934)
- Added a new Service Category Code entitled BHI (for Behavioral Health 1915 I) to the Funding Rule and Service Determination pages. (148956)
- Upgraded eXPRS Infrastructure to Java 11 and Quartz 2.3.2 (164596, 164597)

## 05/17/2023 – v2023.1 Patch #2

### System Services:

- The Aggregation process has been modified to handle certain exceptional scenarios (157074)
- Fixed an issue with the **Update Mainframe Hours Process**, which is used to evaluate SDs and TT claims for Cross-system providers for use by the Mainframe Team. (128025)
- Fixed an issue with GL Objects applying incorrectly during the SFMA Run. (160093)
- Fixed an issue where the incorrect void method was called by the FMAS process, which resulted in errors. (161139)

## 03/28/2023 – v2023.1 Patch #1

### System Services:

- Minor changes to the ETL1/4 file processing. (155857)
- Updates made to Agency Aggregation Process when run from the scheduler. (156382)
- Updates made to improve testing the faux file with PPL. (156725)

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- Corrected an issue with the Paid Leave Oregon (PLO) Global Object Query which was previously returning the incorrect Global Object. (155443)

**02/28/2023 – v2023.1**

## **System Services:**

- Updated the eXPRS Manager Email Functionality used by the OIS Technical Team. (52167, 114946)
- Service Delivered Billing Entries that span multiple Service Group Records (but have the same Service Group) now aggregate into claims successfully. (145614)
- The Claims Aggregation process was updated and improved. (134729)
- An internal email list was created for the Overtime Job. (138385)
- New Release Notes, Guides and Videos were uploaded to the Help Menu. A **General** section was added to the Help Menu Index and Flyouts. This section contains guides for all user groups, which eliminates duplication. (139426)
- Updates to the eXPRS Database to support new functionality in this release. (143217)
- The Overtime and Travel Time Processing time during the Aggregation Cycle has been reduced. (144095)
- Resolved an issue that would occur when processing a file related to PLO. (148784)
- Updated three outdated Help Menu and Help Guide Hyperlinks. (150097)
- Updated a system query involved in processing PLO Claims which would affect system transactions. (150517)

**12/14/2022 – v2022.5**

## **Claims and RFFS Claims:**

- Overtime pay for the final week of each year no longer calculates incorrectly when the year ends in the middle of a week. (39490)

## **Plan of Care:**

- System Jobs are no longer being created incorrectly when a Retroactive Add-on is entered into an individual's Plan of Care. (129500 & 136631)

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## Report

- The **View Add Ons Report > Amount** column has been renamed to **Rate Amount**. This column displays the dollar amount of any Rate Add Ons. The **View Add Ons Report** has a new column entitled **Authorized Hours/Units**. This column displays the number of hours or units authorized with a Staff Ratio Add On. (136732)

## Provider

- eXPRS has been modified to account for the new Paid Leave Oregon (PLO) program contribution beginning 1/1/2023. This new employment-related contribution will now appear on each Personal Support Worker's paystub. For more information about this contribution, see [Paid Leave Oregon Brochure](#). (135112)
- Updated an automated job to allow the Provider Training Tracking Import process to complete if it is interrupted by the nightly database backup. (130709)

## System Services:

- Updates to the eXPRS Database to support new functionality in this release. (143215)
- The **Search Claim Batch Job** page has been created to allow State Users with the **State Claims Batch Manager & State Claims Batch Viewer** roles to search for automated system jobs created when retroactive Add Ons are entered. Additional data columns were also added to a table on the **Claim Batch Process View** page, and some **Status** values have been renamed. (67546)
- Two new roles have been created: **State Allotment Claims Runner (BSU Task)** & **State RFFS Claims Runner (BSU Task)**. The Interfaces flyout on the Left Menu now has an **Allotment/RFFS Interface** option for users with these new roles to complete the related processes. (44948)
- The **Mass Adjustment > Claim Type** field now has Trus3 as an option, and the search results return claims with a type of Trus3. (143453)
- Update Integrated Eligibility (IE) and eXPRS Client Liability (CLA) Real-Time and Batch Webservice to accommodate IE changes. (65291)
- Help Menu & Release Note Updates (139425 & 139438)

10/13/2022 – v2022.4

## Authorizations:

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- While in Edit mode, the **Service Prior Authorization** page now prevents SPAs from being voided when there are approved claims associated with the SPA. (125646)

## Claims and RFFS Claims:

- Resolved issue where Approved SDs could incorrectly be included on a new claim when they are already on an Approved Claim. (138019)
- Completed ONAs that result in a change of Service Group for an individual will now end any active Rate Add Ons. For decreases in Service Groups, a new Claims Exception Code (58) will display which notifies users of the upcoming rate reduction due to an ending Add On. (39735)
- Resolved an issue to ensure the correct rate is paid when provider type & specialty credentials overlap. Also added validations to prevent SPA and SD creation when certain provider types and specialty credentials overlap. (138270)

## Plan of Care:

- The **Service Delivered by Service Authorization > Actual Rate & Total Amount** fields no longer display for Fixed Rate services. This information can be viewed on the claim. (127774)
- Completed ONAs that result in a change of Service Group for an individual will now end any active Rate Add Ons. Add Ons ended for this reason will be highlighted on the POC and have an End Reason. (39735)
- Validation added to prevent Add Ons from exceeding 60 months. (109632)
- New Add Ons can now overlap a denied Add on. (52917)
- The **View Service Delivered > Rate & Amount** fields will now display information for Fixed Rate services when the SD is attached to a paid claim in approved status. (134463)

## Report

- Draft has been added to the **ONA Reports page > Status** dropdown menu. Additionally, the **ONA Reports > Service Group Letter** will only return records in Approved status. (138282)
- Reduce the impact of the Rate History Report data load, resulting in improved performance for eXPRS. (139483)

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## **Provider**

- Resolved an issue preventing some users with the Provider Panel Manager roles from viewing all information under the **Provider > PSW Weekly Hours/Rate** section. (125606)

## **System Services:**

- New PERC Codes added to eXPRS to allow OFS to create funding rules for the new Healthier Oregon Program (HOP). This work is a result of HB3352. (115495)
- Updated various pages to display the **Rate & Amount** fields consistently for Fixed Rate services. (128053)
- Updates to the eXPRS Database to support new functionality in this release. (137127)

**8/11/2022 – v2022.3**

## **Authorizations:**

- Fixed the sort function on Search Pages for CPAs and SPAs, dollar amounts on Rate and Amount columns now sort correctly on search results. (128701)
- Fixes issues with saving Service Prior Auths with “To be determined” to draft status for services with rates that can be either fixed or not to exceed. (132977)
- Allows Service Prior Auths that cross the 7/1/2022 rates change boundary to end the SPA on 6/30/2022 without work arounds. (135018)
- Updates the OR502 Personal Care Services (SPPC) monthly hourly cap to 22 hours a month. (40732)
- Increases the Service Prior Authorization monthly transportation Cap to \$577.32 for OR004 Commercial Transportation Mileage and OR005 Agency Transportation Mileage. (124658)

## **Claims and RFFS Claims:**

- Added the ability to upload batch Residential Service Deliverables for SE50, SE142, and SE152 to the existing Service Delivered batch import page. (41016)

## **Plan of Care:**

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- Completed work that allows specified roles to create Add On in the Plan of Care prior to having an accepted Service Prior Auth. This will allow for more flexibility for the exceptions process to better serve our clients. (124586)
- Updates the View Service Delivered Search page results for rates and amount to be blank instead of \$0.00 for fixed rates to help with sorting and exporting. Updates the Service Delivered Detail View rate field to display Fixed for fixed rates. (124334)
- Bug fix to eliminate an inner scroll on the Create Service Delivered by Single Auth Pages. (115300)
- Bug fixes for transportation SPA limits pertaining to services OR003, OR004, and OR005. The first SPA over the limit will go to Pending status. The limit is a monthly limit, no longer a monthly average. If the units of a SPA in Accepted status are edited and increased to over the limit, the limit is validated again, and the SPA will go to Pending status. (126341)

## **Provider**

- Updated the provider Licensed Bed Capacity to capture claims that could be affected and reprocess them to pay the provider the new correct amount. (39784)

## **System Services:**

- Update Client Name and Prime Logic to match changes on the Mainframe; no visual changes to the user (52053)
- Fixed a timing issue with queries within the Aggregation process to speed up the process. (134721)
- Update RACF process for the eXPRS user IDs and communication with the mainframe. (129374)
- Updates e-mail notification for the Rate History Report Process (131960)
- Help Menu updates. (52028)
- Updates to backend tables. There will not be any visible changes to the frontend user. (128083)
- System login security updates. (43298)
- Updated Release Notes with v2022.2 Patch #1 and #2, and v2022.3 items. (52098)

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## 8/11/2022 – v2022.2 Patch #3

### System Services:

- Resolved an aggregation transaction timeout issue. (135741)

## 7/19/2022 – v2022.2 Patch #2

### Authorizations:

- CPA Search Page; Proc Code ORSLV has been re-added to the Procedure Code Drop Down (133788)

### Reports:

- Fixed issues with Provider Rate History report pulling all data correctly and giving correct error messages to identify issues accurately. (131460)

### System Services:

- Updates were made to the Daily Claims Process Runner. This was backend development only. (134838)

## 6/30/2022 – v2022.2 Patch #1

### Claims and RFFS Claims:

- Fixed the issue that was causing the message “Your request could not be completed because: No valid rate found.” to be returned when submitting or saving a SPA. (131606)
- Added the ability for Agency Providers and Case Management Entities to see the rate on the Claim View and Claims Search page. (128082)

### Plan of Care:

- Fixed an issue with the Service Element dropdown on the Service Delivered pages. (131224)

### Reports:

- Fixed issue with Provider Rate History report to correct usage of Service Location ID. (131615)

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- Fixed multiple issues with Provider Rate History report not pulling rates correctly, report now creates one record per rate change. (131275)
- Made corrections to the View Add Ons Report. Added a max displayed field. Added a multi-select function for Service Type. Added a \$ to the amount column. Changed the Service Type column header to Provider Cat. (131464)
- Corrected the issue of not receiving any results on the Agency Service Group Report page. (130686)

## **System Services:**

- Help menu fixes and edits to the help documents. (131155)

**6/7/2022 – v2022.2**

## **Authorizations:**

- Use of SE53 CPAs and OR553 SPAs for agency transportation has been discontinued and replaced with Procedure Code/Modifiers OR005/WD and OR005/WE. The unit has changed from dollars to miles and the rate is fixed. (39176)
- Corrected an issue with editing, ending, and splitting fixed rate SPAs for OR310. (128072)
- Added the ability to create multiple SDs from multiple Residential Service Prior Authorizations (SPAs) at the same time. (24691)
- Bug fix for Bed Capacity error on authorization when the authorization end date equals the bed capacity start date. (109172)
- Updated the plan line descriptions for Employment. This also allowed the modifier field of the plan line to show the description. (125218)
- Added a new modifier to OR526 R3 for 1:3 services and defines RB ratio as 1:2. This also set up the new compass rates starting 7/1/2022 for certain provider types and specialties. (52947)
- Added the ability for select employment services to be utilized by individuals who are receiving SACU services. It allows SE54 Employment Services to be authorized with SE141 SACU services. (39654)
- Completed work to assure that Prior Authorizations for ALF/RCF will remain as CPAs with the current functionality retained after SE50 migrates to POCs. The specialty provider type 89-840 (RCF) and 89-

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845 (ALF) will differentiate them from other DD50 services. CPA functionality will continue for this specialty provider type past 7/1/22. (39179)

- Added the ability to generate a Service Group Letter that will display an individual's Service Group (SG) that is determined by the Oregon Needs Assessment. (24681)

## **Claims and RFFS Claims:**

- Changes to Claim flyout options to accommodate SE50, SE142 & SE152 CPA/Claim to SPA/SD-Claim Transition (24691)
- Bug fix for Tax Overtime claims. (127817)

## **Enrollments:**

- Fixed an issue with ONA Submit Date that was happening when more than one ONA is created in a single day for the same individual. (70088)

## **Plan of Care:**

- Add/Update POC View Service Delivered flyout to accommodate SE50, SE142 & SE152 Claim to SD/Claim Transition. (24691)

## **Provider:**

- Updated the ALF/RCF provider page to reflect the APD provider. Added the ability to identify a residential provider as an ALF/RCF, and therefore, the rate is set by APD. (39178)
- Set up email notifications for the Provider Training Tracking Export process. This process should notify only state users included on the email list, as to the creation of the file & whether it was successful or not, as well as if the file transmits successfully or not. A schedule for automating the export job was also set up. (126996)
- Provider Type & Specialty, 89-821, created for the new CLS Standard Agency. Provider Type & Specialty, 89-819, renamed from DD Community Living Supports to CLS Employer Agency. Provider Types & Specialties used to read fixed rates from the rate table. (67725)

## **Reports:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Updates were made to the PSW Wkly Hours Report. Changed the column labeled Provider to PSW Name, to match the PSW eXPRS Provider ID link that is attached in the report. (125617)
- Created a report called POC View Add Ons Report. The report will allow Case Management Entities (CMEs) or State users to find all the Add Ons in eXPRS. (39170)
- Created a Provider Rate History Report. Providers can run this report to view the rate histories for SPAs they are the rendering provider for. (39171)

## **System Services:**

- Updated some existing help documents with new versions, as well as added new help guides per the training team. (52027)
- Updated Release Notes with v2022.2. (52097)
- Added an identifier to combined Fixed/NTE Rates. This allows eXPRS to include Fixed and Not to Exceed rates for the same service. (115249)

**4/14/2022 – v2022.1**

## **Authorizations:**

- Preparation for the migration of SE50 24 Hr Adult Residential to move to Plan of Care on 7/1/2022. SE50 24 Hr Adult Residential will become a Fee For Service Delivered, following the 344 days per year model, and using service delivered like SE142 and SE152. (67641)
- Provider Prior Authorizations edit page fixes to edit and void buttons. (52564)
- 1-day ONA Submit and End Date will now be the same date. Fixes previous issue where End date was before the Submit Date. (109520)
- Manual fix for existing ONA records that have a null Submit Date, which is very rare. Concurrent enhancements will fix this issue from happening in the future. (109768)

## **Claims and RFFS Claims:**

- There will be some changes to the View Claims page, as SE142 and SE152 will be using the service delivered aggregation process. (44705)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Fix for SGH to identify ONA gaps correctly and manage 1-day ONAs using same Submit and End date. (67698)

## **Enrollments:**

- Bug fix for DDEE Security when a CDDP/Brokerage DDEE Preparer/Processor/Viewer has access to multiple Organization/Program Areas. (43373)

## **Plan of Care:**

- Preparation for migration SE152 Children's Host Homes and SE142 Kids Residential services to service delivered Fee for Service entry. This includes changes to the View Service Delivered Search page, the View Service Delivered Detail page, how providers will be entering their Fee For Service on the Create Service Delivered page. (44705)
- Adding new modifiers for employment to help differentiate between rates for each type of service. (24680)
- Add Ons for services authorized on the Community Tab in POC are available. SPAs for services that need an Add On will pend for ODDS review. ODDS exception committee creates and approves Add Ons. (41020)
- Service Group Limits are now in a table, which will support future validation functionality for In-Home hours. (43146)
- Bug fix to prevent a POC FC/RES SPA to successfully update/save when there are Approved claims After the SPA end date. (39455)
- Bug fix to allow a SE145-CIIS POC with MFW/MIW Service Eligibility to successfully end when there is a SE48 CPA that does not fall within the entire POC date range. (109338)

## **System Services:**

- Fixed an issue with a scheduled job that was running multiple times. (67344)
- Created a report page for “PSW Weekly Hours Cap Limits” that allows CME and State users to search for PSWs that have weekly hours segments greater than the default 40 hours/week. Updated the

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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PSW Weekly Hours segment information on the PSW provider page to include "entered by user" & "enter by CME" columns. Created a new user action log functionality for just those module items. (46495)

- Added Online Refresher & Refresher Workshop courses to existing list of training categories that display on PSW Required Training section of View Provider (43733)
- Limiting the ability for CMEs & Brokerages to add PSW weekly hours exceptions to just those PSWs on their provider panels. (24685)
- Scheduler process streamline work to use Prime instead of ClientID for scheduler validation for SGH updates. (109765)
- Resolved an issue when creating duplicate EVV exceptions when rapidly clicking on the submit button. (52018)
- Help Menu updates. (52026)
- Updates to the Release Notes. (52096)

2/14/2022 – v2021.5

## **Authorizations:**

- Revised the Service Group History to reflect the Service Group changes correctly. (48833)

## **Claims and RFFS Claims:**

- Claims to continue to pay at current rate when there is an expired ONA. (39177)
- Completed more work on the Provider rate delay following SG reduction. (34234)
- Resolved an issue on the Daily Service Delivered page with the Start and End reason receiving a validation error. (26220)

## **Plan of Care:**

- Implemented phase 1 of a retro add on process. (24687)
- Updated the POC Narrative Field when copied. (41004)
- Increased SE150 Family Support POC Benefit limit. (46792)

## **System Services:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Cleanup and standardize to the server file (48281)
- Help Menu updates. (47084)
- Updates to the Release Notes. (52094)

## 12/20/2021 – v2021.4 Patch #1

### **Enrollments:**

- Resolved an issue with the Add button on the Individual Support Plan (ISP) Dates. (52165)

### **System Services:**

- Resolved an issue around the eXPRS Manager Role being copied on all the system generated emails. (This is a State only role) (52167)

## 12/14/2021 – v2021.4

### **Authorizations:**

- Added Trust to the fixed rate process. Giving the ability to manage the Trust rates through the user interface. (25140)
- Updated the display of Enhanced/Exceptional on various eXPRS pages. Removed Exceptional from being included on the column headers and search criteria, it shall only display Enhanced. (41251)

### **Claims and RFFS Claims:**

- Created a Service Group table that displays the history of Service Group changes for an individual. Currently only available to state users. (34236)
- Corrected an issue on the Enter RFFS Claims For Client page when the dates include dates outside of the CM CPA date range. (25836)

### **Plan of Care:**

- Detaching Add Ons from the POC so that when a copy and/or creating a POC the Add On dates are within the newly copied/created POC. (25324)

### **Reports:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Fixed an issue with the name not displaying in the Client Name column on the EVV Exception Report. (39790)
- Resolved an issue with the EVV Exception report by adding a separate query. (43503)
- Corrected an issue with the reset button not clearing all fields of the search criteria on the EVV Exception Report page. Also fixed an issue with the date field of the search criteria not working correctly. (35148 & 39793)
- Update the report menu to remove decommissioned reports. (34962 & 34964)
- Fixed a display issue with the All Permissions and Roles report. This report is for state users only. (42829)
- Fixed a display issue and duplicate claims showing on the Payment Detail report. (43974 & 44754)

## **System Services:**

- Development of a scheduled job for upload of class information, that will be included in the Provider Training Tracking area. (43316)
- Resolved an issue with the Provider Training Tracking Provider ETL. (45673)
- Help Menu updates. (46928)
- Completed changes to a Mainframe query that connects eXPRS to the mainframe data. (45399)
- Enhancements to the Password security requirements. (42996)

## **10/25/2021 – v2021.3 Patch #2**

## **Plan of Care:**

- Fixed an issue with PPL – ETL2 file not returning all relationships as provider not found. (45770)

## **System Services:**

- Resolved an issue with group services not aggregating correctly. (45685)

## **10/7/2021 – v2021.3 Patch #1**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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## **Claims and RFFS Claims:**

- Resolved an issue with the Mainframe Client Liability Account scheduled job. (43823 and 44103)

## **Plan of Care:**

- Updated PPL – ETL1/2 to pull all files and process them by date. (43745)

## **Reports:**

- Fixed an issue with the CHC and PEAA Expiring Report. (43645)

## **System Services:**

- Updated Webservice to the mainframe configuration for the View Provider Page, Provider Required Training. (43679)

9/25/2021 – v2021.3

## **Reports:**

- To be updated by OIS

6/24/2021 – v2021.2

## **Claims and RFFS Claims:**

- Corrected results when selecting dates for RFFS when dates are covered by active CPAs and some dates that are not, now gives correct error messages for dates not covered by CPAs. (SPDEXPRS-34095)
- Updated Direct Support Provider Name requirement restored for Service Deliveries Entries. (SPDEXPRS- 26797)
- Corrected 24-hour shift batch import issue. (SPDEXPRS- 26367)
- Corrected EVV required field issues. (SPDEXPRS- 25529)

## **Authorizations:**

- Resolved issue with Claims ICN link, now populates with correct page. (SPDEXPRS-33886)
- Corrected issue where 24 hour shifts were denied after submitted. (SPDEXPRS – 26366)

(The task numbers are in parentheses.)



# Release Notes for eXPRS

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- Corrected issues with 0 minute shifts and corrected the error message. (SPDEXPRS – 33961)
- Corrected issue with 24-hour shifts suspending. (SPDEXPRS-26800)
- Corrected exceed 24 hour error message with wording. (SPDEXPRS - 26368)
- Corrected the authorizations pulled based on SPA or CPA in order to display fixed rates on SPAs for certain state users. (SPDEXPRS – 33959)

## **Enrollments:**

- Corrected Service Element list in DDEE drop-down to add SE152 Children's Host Homes option. (SPDEXPRS-33433)
- Corrected required fields for ongoing CPAs. CM CPA was requiring an End Reason with Ongoing "Y" Flag with a 6/30/21 End Date. (SPDEXPRS-34696)
- Add service modifiers ZD and ZT to SE56 and activate ZP for SE 56. (SPDEXPRS – 33443)
- Change DDC waiver category option to Waiver/KPlan. (SPDEXPRS – 24679)

## **Plan of Care:**

- Updated review flag for OR310 to default to NO review. (SPDEXPRS – 33357)
- Corrected Service Eligibility Tab Display to only display active lines. (SPDEXPRS – 34171)
- Add Ons redesign. (SPDEXPRS – 25401)
- SPA rate history that links to POC. (SPDEXPRS – 24690)

## **Reports:**

- Updated EVV Exception Report with new search criteria options. (SPDEXPRS-24684)
- Corrected report criteria and column data on EVV Exception Status Report. (SPDEXPRS- 34654)
- ONA Comparative Report is now available to compare two different ONA versions. (SPDEXPRS-24682)
- Fixed binocs functionality on DHS Contract Numbers (EVV Exceptions Report page). (SPDEXPRS – 24655 and 34655)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Adjusted Exception Type Drop-down list in EVV Exceptions Report. (SPDEXPRS – 34656)
- Correct duplication of providers in EVV Exceptions Report. (SPDEXPRS – 34657)
- ONA Report print function fixed for overlap. (SPDEXPRS – 25767)
- ONA expiration dates now align with the LOC end date. (SPDEXPRS – 25323)
- Added a search page for Agency Providers to view service group levels. Permissions are required to access this page. (SPDEXPRS – 25139)

## **System Services:**

- Correct Timestamps to PST/PDT. (SPDEXPRS- 25413)
- Updated authorization for biennium rollover for contracts and service authorizations. (SPDEXPRS-24686)
- Corrected FMAS FI Fee Claims issue. (SPDEXPRS – 33694)
- Help Menu Update with new links. (SPDEXPRS – 33392)
- Time Zone issues corrected. (SPDEXPRS – 25545)
- Contact Us Page Updates. (SPDEXPRS – 34027)
- Update Calendar/Date Widget on all eXPRS pages. (SPDEXPRS – 24683)
- Add PSW Required Training to View Provider Page. (SPDEXPRS – 25102)
- Increased weekly hours/rates maximum to accommodate provider increase. (SPDEXPRS – 25322)

## **4/8/2021 – v2021.1 Patch #1**

## **Claims and RFFS Claims:**

- Resolved an issue with claims for services with each even types not correctly using the rate on the service delivered. (25606)
- Resolved an issue with receiving a blank page when clicking on the ICN number from the PSW Claim Search page. (25597)
- Corrected an issue with the Daily Service Delivered Page and dates outside of the single date criteria. (25604)

## **Plan of Care:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Resolved an issue with the Daily Service Delivered page not displaying correctly. (26192 and 25603)

**3/23/2021 – v2021.1**

## **Authorizations:**

- Updated the Oregon Needs Assessment to require assessors to complete the first ONA of the age skip years. (SPDEXPRS-1918)
- Resolve an issue with duplicate comments on CPA/SPA. (SPDEXPRS-1977)
- Updated the Oregon Needs Assessment search page to include a dropdown to select from to customize search results. (SPDEXPRS-2010)
- Resolved an issue with the Level of Care when more than one Oregon Needs Assessment is created in the same day. (SPDEXPRS-2019)
- Update criteria around the end reason code for case management CPAs. (SPDEXPRS-2020)
- Resolved an issue with new claim line entry receiving an application error. (SPDEXPRS-2029)

## **Claims and RFFS Claims:**

- Resolved an issue around the correction process. (SPDEXPRS-2009)
- Issue resolved when editing, attaching, and saving manual PLAs for RFFS. (SPDEXPRS-2013, 2014)
- Fixed an issue when updating liability to zero on the Provider Liability Edit page. Receiving a validation error. (SPDEXPRS-2015)
- Corrected an issue when overtime shifts crosses over midnight. (SPDEXPRS-2017)
- Fixed an issue when more than one Oregon Needs Assessment is created in the same day. Rates are now pulling from the last one created for the day. Also updated Service Group message to reflect when more than one Oregon Needs Assessment for the claim dates are found with different Service Groups. (SPDEXPRS-2018)

## **Enrollments:**

- EVV various enhancements and bug fixes. (SPDEXPRS-1955)
- Resolved an issue with the Brokerage close button removing data and attachments on the DDEE. (SPDEXPRS-2008)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Updated EVV drop down reason changes. (SPDEXPRS-2022)

## **Plan of Care:**

- Resolved an issue with the date format on the Service Delivered page. (SPDEXPRS-1975)
- Resolved issues, one with an issue when editing POC dates, and one with overlapping dates. (SPDEXPRS-1996)
- Resolved an issue when creating service deliveries and receiving 0d once the record was saved. (SPDEXPRS-2016)
- Resolved an issue when adding new assessed hours increase by date range when hours have already been claimed, and the hours close to the current assessed hours amount. (SPDEXPRS-2027)

## **Reports:**

- Creation of an ONA Reports Landing page. (SPDEXPRS-1966)

## **System Services:**

- Login Page Message Changes. (SPDEXPRS-1880)
- Corrected an issue with delegated security permissions. (SPDEXPRS-1943)
- Change to new role creation to an infinity end-date. (SPDEXPRS-1953)
- Template refactoring in support of ONA letters for future work. (SPDEXPRS-1993)
- Updated the content on the Help menu. (SPDEXPRS-2005)

## **1/21/2021 – v2020.2&3 Patch #2**

## **Authorizations:**

- Fixed PDF Printing Issue with ONA – PDFs were too large to email. (SPDEXPRS-1994)

## **Claims and RFFS Claims:**

- Corrected an issue with the Travel Time date incorrectly displaying after being saved. (SPDEXPRS-1987)
- Updated focus of the cursor to the first empty text box on the Service Deliveries entry page. (SPDEXPRS-2001)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Resolved an issue when opening EVV shifts in mountain time zones. (SPDEXPRS-1986)
- Fixed Mileage Date Entry not supporting 2-digit years. (SPDEXPRS-2002)
- Corrected an issue with error messages not being returned correctly when a Batch Service Delivery import included bad data. (SPDEXPRS-2004)

## **Plan of Care:**

- Resolved an issue with 1-day Plan Lines and Monthly Assessed hours error. (SPDEXPRS-1981)
- Stabilized the tab order for the POC page. (SPDEXPRS-1983)
- Fixed an alignment issue with the PSW Timesheet. (SPDEXPRS-1988)
- Corrected an issue when ending SPAs. (SPDEXPRS-1990)
- Fixed an issue with overlap of add-ons. (SPDEXPRS-1992)
- Resolved an error issue with adding a second claim for foster care. (SPDEXPRS-1997)

## **System Services:**

- Added amount column back to SPA search results, with the rate and amount totals. (SPDEXPRS-1978/1979)
- Add Rate to SPA View Page for NTE rates. (SPDEXPRS-1980)
- Fixed timestamp issue for manual entry of Service Delivery time. (SPDEXPRS-1984/1985)
- Updated Direct Support Professional name field on the Service Delivered page to handle up to 100 characters. (SPDEXPRS-1989)
- Corrected an issue with Direct Support Professional not seeing the authorizations when logged in as a Personal Support Worker. (SPDEXPRS-1991)
- Fixed an issue with Provider Type Specialty 84-804 being included on the notice. (SPDEXPRS-1995)

12/18/2020 – v2020.2&3

## **Authorizations:**

- Added Service Group to the Oregon Needs Assessment search page. (SPDEXPRS-1957)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Updated the Enhanced/Exceptional Algorithm with the Oregon Needs Assessment. (SPDEXPRS-1917)
- Change Host Homes SE152 from monthly to a daily. (SPDEXPRS-1907)
- Corrected an Oregon Needs Assessment issue with “People Who Attended the Assessment Interview or Contributed to the Assessment” field on the Demographic Information page. (SPDEXPRS-1941)
- Moved age validation from “Date of Assessment Interview” to “Assessment Created Date” of the Oregon Needs Assessment. (SPDEXPRS-1945)

## **Claims and RFFS Claims:**

- Added Client Liability and Net Payment to Claim Search Results. (SPDEXPRS-1908)
- Added Perc Code H5 to the funding rule algorithm. (SPDEXPRS-1915)
- Fixed an issue with RFFS duplicate Claim Validation. (SPDEXPRS-1947)
- Updated Trust to New Rate. (SPDEXPRS-1970)
- Resolved an issue with SE48 RFFS claims being allowed when an individual had a SE148 CPA. (SPDEXPRS-1920)

## **Enrollments:**

- Display Action Log on "View Provider" Page. Action Log is only available to state users. (SPDEXPRS-1914)
- Modify ELGI Webservice to Consume the MMIS Webservice Directly. (SPDEXPRS-1329)
- EVV enhancements. (SPDEXPRS-1944, 1959)
- EVV bug fixes. (SPDEXPRS- 1887, 1888)

## **Plan of Care:**

- Resolved an issue with submitting suspended Service Deliveries and Claims Scheduled Processes. (SPDEXPRS-1927)
- Removed the ‘File Encoding is UTF-8’ language from the Service Deliveries Import page. (SPDEXPRS-1883)
- Resolved an ETL File Transfer Issue. (SPDEXPRS-1926)
- Resolved Timely Submission and PLA Recovery for OT. (SPDEXPRS-1903)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Updated PPL - ETL3 Query to No Longer Send Duplicates. (SPDEXPRS-1958)
- Changes made to the Weekly Employment Hours Validation. (SPDEXPRS-1886)
- POC redesign to include Add-Ons. (SPDEXPRS-1841)
- Re-configured the Service Element dropdown on the POC page. Populating SE dropdown based on SEs on the users role. (SPDEXPRS-1940)
- POC redesign and POC Enhancements. (SPDEXPRS-1925)
- Migrated 24 Hour Residential Service Element 50 to POC SPA. (SPDEXPRS-1704) Effective begin date in the future.
- Added ability to create and claim for service overlap. (SPDEXPRS-1898)
- Added 344-day billing for POC residential services. (SPDEXPRS-1884) Effective begin date in the future.
- Restructured how residential absence claims function for POC. (SPDEXPRS-1885) Effective begin date in the future.

## **Reports:**

- Corrected a date error message when running the RFFS monthly report. (SPDEXPRS-1922)
- Resolve Payment Detail Report Issue. (SPDEXPRS-1956)

## **System Services:**

- Help menu updates. (SPDEXPRS-1894)
- Corrected issues around CIIS inability to pay through RFFS. (SPDEXPRS-1924)
- Resolved an issue with Service Element 142 Split button in POC/SPA. (SPDEXPRS-1923) Effective begin date in the future.
- Resolved an issue with EVV time zone. (SPDEXPRS-1767)
- Add “Phone number” to User Role and Find Provider search pages. (SPDEXPRS-1919)
- Migrate Specialty Services table from the Mainframe to eXPRS. (SPDEXPRS-1738)
- Completed changes to the User Role table. (SPDEXPRS-1928)

**7/11/2020 – v2020.1**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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## **Claims and RFFS Claims:**

- Merged the View Claim and Update Claims pages into one page. (SPDEXPRS-1660)
- Fixed an issue with PLA not recovering due to sort order. (SPDEXPRS-1911)
- Fixed an issue with the Service Coordinator Drop Down list. (SPDEXPRS-1912)
- Corrected hyperlinks issue with the view FFS and RFFS Claims search page. (SPDEXPRS-1829)
- Resolved an issue with PLA recovery for PSWs. (SPDEXPRS-1902)
- Resolved a bug with Client Liability Suspended Claims. (SPDEXPRS-1899)
- Resolved issue with Claims Preparer permissions. (SPDEXPRS-1905)
- Resolved an issue with the Fund Adjust Process with PPL. (SPDEXPRS-1935)

## **Enrollments:**

- Created a scheduled recalculation process for ONA for state user level. (SPDEXPRS-1910)
- Created a New Dual Permission for ONA. (SPDEXPRS-1771)
- ONA Rate Restructure enhancements. (SPDEXPRS-1836, 1837, and 1838)
- EVV enhancements. (SPDEXPRS-1827)
- EVV bug fixes. (SPDEXPRS-1826)
- DDEE Enhancements and Bug Fixes. (SPDEXPRS-1852)
- Preparation work to migrate Children's 24 Hour Residential Service Element 142 to POC. (SPDEXPRS-1792)

## **Plan of Care:**

- Resolved SD export billed units bug. (SPDEXPRS-1849)
- Resolve issue with OT claims bug. (SPDEXPRS-1779)

## **Reports:**

- Created new report for New User Accounts Created/Updated. (SPDEXPRS-1855)
- Created EVV Exceptions report (SPDEXPRS-1831)

(The task numbers are in parentheses.)



# Release Notes for eXPRS

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## **System Services:**

- Fixed login issue. (SPDEXPRS-1938)
- Resolve issue with account creation. (SPDEXPRS-1832)
- Resolve issue with reset password email address. (SPDEXPRS-1830)
- Help menu updates. (SPDEXPRS-1842)
- Resolved issue when adding roles to user accounts. (SPDEXPRS-1909)

## **2/4/2020 – v2019.4 Patch #1**

## **Enrollments:**

- Corrected an issue with the Service Group Label, General Support Needs score and Recalculate Results that are displayed for State use only. (SPDEXPRS-1859)
- Fixed issues with ONA permissions, inability to print some ONAs, and ONA item 7e-1 age skip issue. (SPDEXPRS-1860)
- Fixed issue with State users not seeing all LOCs pending for review. (SPDEXPRS-1860)

## **System Services:**

- Contact Us Page Changes to fix an incorrect email. (SPDEXPRS-1858)
- Adding updated documents to the eXPRS Help menu. (SPDEXPRS-1873)
- Resolved attached document format issue. (SPDEXPRS-1874)
- Corrected an Internet Explorer browser issue with Electronic Visit Verification (EVV). (SPDEXPRS-1876)
- Resolved issue with SD end time for OR507. (SPDEXPRS-1877)

## **1/13/2020 – v2019.4**

## **Authorizations:**

- Migrated Host Homes Service Element 152 to POC SPA. (SPDEXPRS-1790)
- Resolved Issues with POCs around Daily Services, ETL3 File, and OT. (SPDEXPRS-1700, 1791, 1796)
- Added 2:1 value to specific questions of the Oregon Needs Assessment. (SPDEXPRS-1773)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Added Service Group value to specific questions of the Oregon Needs Assessment. (SPDEXPRS-1697)
- Removed pending review functionality for Oregon Needs Assessments with an Exceptional status. (SPDEXPRS-1770)
- Added the Oregon Needs Assessment Demographic information to the full and summary print cover page. (SPDEXPRS-1774)

## **System Services:**

- Updates to the eXPRS generated PSW timesheets/mileage sheets, that were needed to reflect the changes with EVV. (SPDEXPRS-1777)
- Standardizing page flow for the Rate Increase page. (SPDEXPRS-1772)
- Contact Us Page changes (SPDEXPRS-1816)
- Added comment field to the permissions page, for state use only. (SPDEXPRS-1741)
- Resolved an issue with the Manage User Roles for state users. (SPDEXPRS-1746)
- Added new options to the Category and Subject drop down menus on the eXPRS Technical Assistance Request form, as well as alphabetized the menu. (SPDEXPRS-1801)

## **Claims and RFFS Claims:**

- Corrected some issues with Manual PLA functionality. (SPDEXPRS-1799)
- Resolved some issues with the RFFS Monthly Report. (SPDEXPRS-1848)
- Corrected some issues with EVV Exceptions page functionality. (SPDEXPRS-1766)

## **Enrollments:**

- Implemented enhancements and resolved an issue with the DD Eligibility and Enrollment page. (SPDEXPRS-1760)
- Resolved an issue with DD Eligibility Specialist Drop Down. (SPDEXPRS-1823)
- Removed Service Eligibility Branch Code From Client View Page. (SPDEXPRS-1817)
- Added new Oregon Needs Assessment permissions for the Case Management Entity access to their assessments. (SPDEXPRS-1708)

**11/19/2019 – v2019.3 Patch #2**

## **Authorizations:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Updated the SD review flag functionality to check for All Provider Type 84 Specialties. (SPDEXPRS-1818)

## **System Services:**

- Fixed an issue with duplicate request errors when users complete or updates an enrollment. Also includes a fix to action log issues. (SPDEXPRS-1809)

## **Claims and RFFS Claims:**

- Completed work to allow EVV upload for agency providers. (SPDEXPRS-1702)
- Corrected some issues with EVV functionality. (SPDEXPRS-1703)
- Completed more work with the EVV Exception section on provider records to allow exceptions to the EVV functions. (SPDEXPRS-1701)
- Resolve issue with OT Tax Claims. (SPDEXPRS-1812)

### **11/01/2019 – v2019.3 Patch #1**

## **Claims and RFFS Claims:**

- Fixed an issue with CME and State entered SDs returning an error when submitting multiple SDs. (SPDEXPRS-1810)

## **Enrollments:**

- Corrected an issue with the DD Eligibility and Enrollment page. (SPDEXPRS-1808)

### **10/28/2019 – v2019.3**

## **Claims and RFFS Claims:**

- Enhanced the foundational work to allow manually created PLAs. (SPDEXPRS-1726, 1728)
- Removed the timely filing edit on older PLAs to allow update regardless of the original claim filing date. (SPDEXPRS-1747)
- Completed initial work to allow EVV upload for agency providers. (SPDEXPRS-1702)
- Corrected some issues with EVV functionality. (SPDEXPRS-1703)
- Added an EVV Exception section on provider records to allow exceptions to the EVV functions. (SPDEXPRS-1701)
- Updated functionality for OT claims regarding timely submission. (SPDEXPRS-1729)
- Updated billing for benefits counseling. (SPDEXPRS-1729)
- Reduced the results returned on the SD search page from 20k records to 5k records. (SPDEXPRS-1797)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Corrected an issue with the SD entries and allowance of 15-minute overlaps. (SPDEXPRS-1749)

## **Authorizations:**

- Updated the Review Flag on SPAs. (SPDEXPRS-1730)

## **Enrollments:**

- Implemented a redesign of the DD Eligibility and Enrollment pages. (SPDEXPRS-1658)
- Updated the PSW Weekly Hours limit functionality on the view provider page. (SPDEXPRS-1694)
- Enhancements were made to the ONA, including bug fixes and changes to the enhanced and exceptional values. (SPDEXPRS-1296, 1725, 1759)
- Changes in the import of CLAs and correction to functionality to resolve an issue with zero balance CLAs for individuals with EPD. (SPDEXPRS-1551, 1582, 1593, 1712)
- Started the framework to make updates for ELGI webservice. (SPDEXPRS-1327, 1329, 1670)

## **Reports:**

- Corrected an issue with the RFFS CDDP/Brokerage By Service Month report. (SPDEXPRS-1607, 1737)

## **System Services:**

- Converted EJB DB queries to JDBC queries (CLA). (SPDEXPRS-1709)
- Revised the FMAS fee module for authorizations and claims. (SPDEXPRS-1192)
- Updated verbiage throughout the system to refer users to the Technical Assistance Request rather than the DHS Service Desk. (SPDEXPRS-1748)
- Fixed a typo in the email addressed used in the temporary password email. (SPDEXPRS-1758)
- Enhanced how the system handles leap year. (SPDEXPRS-1723)
- Enhanced the action logging on the service determination pages. (SPDEXPRS-1713)
- Fixed an issue with the user drop down field for DDEE pages. (SPDEXPRS-1757)

**08/22/2019 – v2019.2 Patch #3**

## **Enrollment:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Resolved an issue with the pay to provider for the new Trust 3/training claim type. (SPDEXPRS-1755)

## 08/13/2019 – v2019.2 Patch #2

### Claims and RFFS Claims:

- Relaxed the editing around provider liability accounts for older claims. (SPDEXPRS-1727)

### Enrollment:

- Resolved an issue with the LOC calculation. (SPDEXPRS-1740)

## 07/11/2019 – v2019.2 Patch #1

### Enrollment:

- Resolved an issue with viewing DD Eligibility information. (SPDEXPRS-1715)
- Resolved an issue with the LOC hyperlink. (SPDEXPRS-1716)

### System Services:

- EVV Bug fixes with missing scroll bar. (SPDEXPRS-1714)
- Corrected an issue with Service Determination specific to SE248. (SPDEXPRS-1717)

## 06/25/2019 – v2019.2

### Claims and RFFS Claims:

- Enhanced the foundational coding to allow manual creation of provider liability accounts (PLAs) within eXPRS. Full functionality will be implemented in v2019.3. (SPDEXPRS-1664)
- Fixed an issue with funding adjustments for ancillary claims. (SPDEXPRS-1710)
- Updated the validation rules for claims to use the original submit date instead of the created date, to calculate timely filing edits. (SPDEXPRS-1687)
- Resolved an issue with the overtime process checking for trust claims. (SPDEXPRS-1695)
- Added a new trust claim type (TRUS3) for the PSW training fund. (SPDEXPRS-1693)

### Authorizations:

- Updated the coding and edits for the Oregon Needs Assessment, with the addition of a RIT/Risk report. (SPDEXPRS-1296, 1648, 1655, 1683)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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## **Enrollments:**

- Added the ability to search for provider records by the provider's email addresses (primary and secondary). The search supports an exact match only. (SPDEXPRS-1661)
- Fixed an issue with client liability accounts (CLAs) not showing zero balance accounts. Added back the ability to view the individual's case descriptors. (SPDEXPRS-1690)
- Implemented enhancements and bug fixes for DD Eligibility. (SPDEXPRS-1696)

## **Reports:**

- Developed a new RFFS report for case management entities. (SPDEXPRS-1607)

## **System Services:**

- Corrected an issue with the filter field available for some fields and multi-select function on user accounts (adding roles) and on user roles (adding permissions). (SPDEXPRS-1665)
- Added new functionality in the Technical Assistance Request process to allow a user to submit a request on behalf of someone else. (SPDEXPRS-1686)
- Updated the service determination pages. (SPDEXPRS-1669)
- Updated the login process to disregard case sensitivity for the login name. Enabled users to login with the email address associated to their user account. (SPDEXPRS-1633)
- Corrected some issues around CIIS eligibility. (SPDEXPRS-1692)
- Implemented enhancements and bug fixes for electronic visit verification (EVV). (SPDEXPRS-1636, 1657)

## **04/15/2019 – v2019.1 Patch #1**

### **Claims and RFFS Claims:**

- Fixed a display issue with the status field when exporting SDs. (SPDEXPRS-1682)

### **Authorizations:**

- Updated the SPA review flag functionality so that when a draft PSW SPA is edited, the Review flag is not updated to N. (SPDEXPRS-1679)
- Updated the CPA search to include the service modifier code.

### **Enrollment:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Updated functionality around CIIS eligibility, including an update to the age limit (less than 18 years old), and corrected a POC provider panel issue. (SPDEXPRS-1677)
- Deployed bug fixes for the DDEE and client eligibility pages. (SPDEXPRS-1678)

## **System Services:**

- Corrected an issue with the foster care credentials which prevented users from logging in. (SPDEXPRS-1680)
- Added additional EVV help documents.

**04/04/2019 – v2019.1**

## **Claims and RFFS Claims:**

- Enhanced claim validations and added new claim exceptions to better define issues with claim and associated claim processing. (SPDEXPRS-1615, 1618, 1622, 1624, 1666)
- Added additional fields to support RFFS for ONA billings and consolidated the RFFS pages. (SPDEXPRS-1609, 1614)
- Added the SD ID to the View Service Delivered page to link to the SD detail page for suspended or denied SDs. (SPDEXPRS-1597)
- Updated and enhanced functionality around Electronic Visit Verification (EVV). (SPDEXPRS-1602, 1611, 1635)

## **Authorizations:**

- Updated the default values for the SD Review flag based on changes implemented 2/1/19. (SPDEXPRS-1605)
- Updated and fixed some issues around the plan of care. (SPDEXPRS-1596, 1605, 1625, 1626, 1659, 1668)

## **Enrollments:**

- Updated the Eligibility and Enrollment pages. (SPDEXPRS-1317, 1457, 1569, 1592, 1692)
- Added a new CIIS Eligibility section on the View Client page for the CIIS unit. (SPDEXPRS-1603)
- Fixed an issue on the View Client page and updated it to display service eligibility for all individuals rather than only showing for eXPRS individuals. (SPDEXPRS-1634, 1652)
- Updated the system to prepare for a switch in how we receive client liability account (CLA) information; data will now be received/loaded from MMIS (Medicaid Management Information System), or IE

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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(Integrated Eligibility). (SPDEXPRS-1551, 1560, 1561, 1593, 1619, 1623)

- Enhancements and changes made around the ONA in eXPRS, including new functionality for pulling ONA expiration information, and RIT results. (SPDEXPRS-1555, 1556, 1594, 1595, 1621, 1627, 1630)

## **System Services:**

- Corrected an application error with the Note field on the Technical Assistance Request form. (SPDEXPRS-1617)
- Updated the ETL4 process. (SPDEXPRS-1667)
- Added action logs to the Manage Roles page. (SPDEXPRS-1608)

## **01/17/2019 – v2.5.3 Patch #1**

### **Claims and RFFS Claims:**

- Enhanced some EVV functionality and fixed an issue with saving SD entries for some iPhones. (SPDEXPRS-1565)

### **System Services:**

- Fixed an issue with the Manage User attachment section when the organization was updated on a user account with attachments. (SPDEXPRS-1610)

## **01/02/2019 – v2.5.3**

### **Claims and RFFS Claims:**

- Corrected the PA Adj # hyperlink on the claims page to route to the appropriate authorization type (SPA) for foster care claims. (SPDEXPRS-1568)
- Updated the associated claim section shown on the view claim page. (SPDEXPRS-1588)
- Revised the SD and claim validations for timely filing edits. The system will use the original submit date and if a suspended SD for timely filing is overridden, the resulting aggregated claim will automatically override as well. (SPDEXPRS-1449)
- Corrected an issue with the system replacing original submit dates for SDs and allowing null values. (SPDEXPRS-1586)
- Updated and enhanced the EVV functionality added previously. (SPDEXPRS-1565)

(The task numbers are in parentheses.)



# Release Notes for eXPRS

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## **Authorizations:**

- Updated some POC functionality. (SPDEXPRS-1590)

## **Enrollments:**

- Updated and enhanced DD eligibility functions. (SPDEXPRS-1515)
- Modified the Provider Enrollment Application and Agreement field to allow a five-year range for all provider types managed in eXPRS. (SPDEXPRS-1557)
- Updated the FC SPAs to reflect claims not SDs. (SPDEXPRS-1585)
- Updated the Oregon Needs Assessment and functionality. (SPDEXPRS-1296, 1549, 1558, 1584)
- Modified the CLA Batch Interface to align with new IE specifications. (SPDEXPRS-1593)
- Added new data for the OHI/OGC “Other” field on the LOC. (SPDEXPRS-1562)

## **System Services:**

- Updated the hyperlinks on the login page. (SPDEXPRS-1550)
- Updated several help documents, added new help documents, and revised the information on the Contact Us page. (SPDEXPRS-1574, 1591)
- Added new permissions to support drop down lists of users for specific functions. This includes drop downs for Assessors, Eligibility Specialists, Service Coordinators, and Personal Agents. (SPDEXPRS-1554)
- Updated the Technical Assistance Request form to add new EVV options. (SPDEXPRS-1587)
- Implemented functionality for state users to add attachments on user accounts. (SPDEXPRS-1559)
- Converted EJB DB queries to JDBC queries for various components within the system. (SPDEXPRS-1527)
- Updated and created new WSDLs for CLAs and eligibility. (SPDEXPRS-1551, 1552, 1582)

## **10/23/2018 – v2.5.2 Patch #1**

### **Claims and RFFS Claims:**

- Resolved an issue with the FMAS interface file for tax burden claims. (SPDEXPRS-1579)

### **Enrollments:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Updated the code to display certain color values in the ONA for state staff. (SPDEXPRS-1580)

## **System Services:**

- Resolved an issue with the PLA recovery of claim corrections for PSWs. (SPDEXPRS-1581)

**10/09/2018 – v2.5.2**

## **Claims and RFFS Claims:**

- Implemented the initial framework to allow manual creation of provider liability accounts for transferring in liabilities from alternate systems. (SPDEXPRS-1446)
- Streamlined and updated the state's mass adjustment process for reprocessing claims en masse. (SPDEXPRS-1496)
- Set up a new claim edit rule (exception code) for zero net tax payments. This allows state users to find the suspended claims using the specific exception code. (SPDEXPRS-1523)
- Modified and enhanced the claims pages, eliminating the Submit Claim page. Functionality on the search now allows the user to include a status in the search to take an action on one or more claims found in the search. Actions allowed are based on the user's permissions. (SPDEXPRS-1500)
- Revised the search page for Service Deliveries and the Review SD pages. Added additional fields, such as Submitted From and Submitted To, plus Created From and Created To, to help customize search results. (SPDEXPRS-1499)
- Updated the Submit RFFS Claim page to include the exception code as a search item. Also added the ability to exclude the exception code(s) entered, as well as an option to display the exception code description. Updated the results columns to reflect the page changes. (SPDEXPRS-1539)
- Began implementing the framework for Electronic Visit Verification (EVV). (SPDEXPRS-1458, 1459, 1461, 1460)

## **Authorizations:**

- Updated plan limits for family support services. (SPDEXPRS-1541)
- Corrected an age edit for SPAs in POC. (SPDEXPRS-1547)
- Corrected an issue with the overtime start date. (SPDEXPRS-1548)

## **Enrollments:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Implemented some enhancements and changes to the DDEEU as well as the View Client page. (SPDEXPRS-1317, 1444, 1493, 1513)
- Added new fields to track enrollment information to the provider page for state staff. (SPDEXPRS-1540)
- Research and initial development to support integrated eligibility. (SPDEXPRS-1327, 1329, 1551, 1552)
- Enhancements and changes to ONA functionality. (SPDEXPRS-1296, 1497, 1543, 1545)
- Updates made to support waiver changes. (SPDEXPRS-1522,1526)

## **Reports:**

- Updated the TAU suspended claim report to concatenate exception codes. This same functionality was then applied to multiple pages, such as Claims and RFFS Claims. (SPDEXPRS-1453)

## **System Services:**

- Updated the verbiage on the password reset email. (SPDEXPRS-1542)
- Added the ability to filter the action log on the Manage User page for locked account research. (SPDEXPRS-1495)
- Changes and updates to help menu documents. (SPDEXPRS-1546)
- Implemented a job completion email for the scheduled unlock process. (SPDEXPRS-1525)

## **07/19/2018 – v2.5.1 Patch #2**

### **Claims and RFFS Claims:**

- Updated the balancing routine to optimize the claims processing jobs. (SPDEXPRS-1524)
- Fixed the issue with the client prime field on the RFFS “Enter RFFS Claims for single date” page. Prime number is now being used to limit results. (SPDEXPRS-1531)

### **Enrollments:**

- Enhanced the DD eligibility process thru the view client pages. (SPDEXPRS-1317)
- Resolved an issue with provider expiration email process where it was returning a false error in some instances. (SPDEXPRS-1528)
- Corrected a format issue with the termination date fields on the client eligibility page. (SPDEXPRS-1529)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Updated the LOC summary to show data and print as expected. (SPDEXPRS-1530)

## **System Services:**

- Changed the restart time after the data export job. (SPDEXPRS-1508)

## **06/28/2018 – v2.5.1 Patch #1**

### **Claims and RFFS Claims:**

- Created a new claiming option for ONA billings. It will be accessed from the RFFS “Enter RFFS Claims for single date” page. The new ONA billing claims will use a claim modifier of ONA, whereas the regular RFFS claims will use REG as the claim modifier. The RFFS pages and results lists will not include the claim modifier until a future release. (SPDEXPRS-1492)
- Corrected an issue with corrected or voided SDs and the claim aggregation process. (SPDEXPRS-1518)
- Fixed an issue with the travel claims, and one with tax claims for overtime claims. (SPDEXPRS-1519, 1520)

### **Enrollments:**

- Enhanced the DD eligibility process thru the view client pages. (SPDEXPRS-1503)
- Implemented some calculations for the Level Of Care from the ONA. (SPDEXPRS-1502)
- Created a data flow for the LOC information from the results of the ONA to the view client pages. (SPDEXPRS-1491)
- Corrected some issues within the ONA and LOC. (SPDEXPRS-1447)
- Modified the SPA update and recalculate process. (SPDEXPRS-1521)

### **System Services:**

- Enhanced the unlock script so it does not add a note to the user’s account. (SPDEXPRS-1508)

## **06/13/2018 – v2.5.1**

### **Claims and RFFS Claims:**

- Created a new reports page for state users for processing suspended claims. (SPDEXPRS-1438)
- Resolved an issue with the resubmit process for RFFS claims. (SPDEXPRS-1477, 1484)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Fixed an issue with the on demand/out of cycle process when exporting the data to CSV. (SPDEXPRS-1478)

## **Authorizations:**

- Added new procedure codes and modifiers for plan of care services. (SPDEXPRS-1454)
- Modified some functions in the Plan Of Care. (SPDEXPRS-1436)

## **Enrollments:**

- Added the provider numbers, plus the provider type and specialty to the provider panel and user account pages. (SPDEXPRS-1451)
- Updated the View Client pages to incorporate DD eligibility changes. (SPDEXPRS-1444, 1448)
- Researched system needs to support Integrated Eligibility, including changes to the Client Liability Account. (SPDEXPRS-1327, 1328)
- Updated edits and functionality around the Oregon Needs Assessment. (SPDEXPRS-1296)

## **Reports:**

- Began the review of reports to migrate away from Business Objects. (SPDEXPRS-1441, 1483)

## **System Services:**

- Converted EJB DB queries to JDBC queries (SPDEXPRS-1457)
- Updated the FTP software protocol. (SPDEXPRS-1479, 1480)
- Updated the content on the Help menu and the Contact Us page. (SPDEXPRS-1490, 1494)
- Modified the evaluation of the Identity Verification Answer to ignore any leading and trailing spaces. (SPDEXPRS-1450)
- Created a new web form to submit requests for technical assistance in eXPRS. (SPDEXPRS-1445)
- Added the script to unlock user accounts to the scheduled jobs, to run twice a day. (SPDEXPRS-1440)
- Resolved an issue with email and logging. (SPDEXPRS-1439)

## **5/3/2018 – v2.5.0 Patch #1**

## **Enrollments:**

- Updated the security to correct an issue with DD eligibility not showing for local auth users as expected. (SPDEXPRS-1476)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Corrected an issue for CI clients not showing Medicaid information. (SPDEXPRS-1474)
- Resolved an issue with CIIS SD entries reading case management. (SPDEXPRS-1473)

## **System Services:**

- Updated the code for tax claims. (SPDEXPRS-1472)

**4/24/2018 – v2.5.0**

## **Authorizations:**

- Removed the edit that caused all SE50 CPAs to pend. They will now go thru to accepted unless there's another issue (such as the rate exceeding the standard rates). (SPDEXPRS-1375)
- Created a process to allow an out of cycle aggregation process thru the front end. (SPDEXPRS-1386)
- Changed the default for the Review Required flag to N for foster care services. (SPDEXPRS-1410)
- Updated the scheduled pay periods for OT and travel time. (SPDEXPRS-1413)
- Resolved some issues with OT and the overtime tables, as well as the tax claim creation. (SPDEXPRS-1384, 1425)
- Corrected an error returned on CPAs when the PPA is not yet in accepted status. (SPDEXPRS-1409)

## **Enrollments:**

- Implemented changes to the DDEE pages to support DDEE data flow. (SPDEXPRS-1354)
- Updated the View and Update Client pages to enhance DD eligibility management. (SPDEXPRS-1317, 1369)
- Enhanced the data validations and edits for the ISP fields. (SPDEXPRS-1379)
- Updated and enhanced the Oregon Needs Assessment for version 2, including print options. (SPDEXPRS-1296, 1298, 1299, 1301, 1305, 1313, 1314, 1322, 1324, 1383, 1385, 1390, 1407, 1408, 1411, 1422, 1423)
- Resolved an issue for invalid data received from the vendor for SIS assessments. (SPDEXPRS-1377)

## **System Services:**

- Added tokens to some pages to prevent duplicate creation of entries caused by using the browser's back button. (SPDEXPRS-1376, 1433)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Updated the Contact Us page to reflect changes for requesting assistance. (SPDEXPRS-1406, 1435)
- Verified functionality with the CI single name change implemented by the MF team. (SPDEXPRS-647)
- Added credential date information to the Home page for foster care providers. (SPDEXPRS-1414)
- Corrected the RFFS approval “pause” feature in the scheduler which will result in the process picking back up after it’s paused. (SPDEXPRS-1442)
- Added validation for service rates and funding rules to line up with the service. (SPDEXPRS-1397)
- Modified the scheduler processes around the submission of suspended claims. (SPDEXPRS-1427)

## **1/23/2018 – v2.4.2 Patch #3**

### **System Services:**

- Resolved issues with the FMAS files. (SPDEXPRS-1430)

## **1/11/2018 – v2.4.2 Patch #2**

### **System Services:**

- Resolved issues with the BSI report. (SPDEXPRS-1420)
- Resolved an issue with ETL3 and ETL4. (SPDEXPRS-1418, 1419)
- Updated several help documents and added new documents for FC providers. (SPDEXPRS-1403)

## **11/30/2017 – v2.4.2 Patch #1**

### **System Services:**

- Revised the association file and ETL files for FMAS claim processing. (SPDEXPRS-1387, 1388)

## **11/21/2017 – v2.4.2**

### **Claims and RFFS Claims:**

- Created new screens for foster care claims, along with other modifications needed to process the claims and authorizations. (SPDEXPRS-1283, 1363, 1364, 1365, 1367)
- Added the authorized rate to the claim process. (SPDEXPRS-1339)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Modified the absence claim modifier limits from 45 total days (within a fiscal year), to 21 total days within a fiscal year; effective 9/1/17. (SPDEXPRS-1358)
- Corrected an issue with the hyperlink to the funding rule from the Update Claims page. (SPDEXPRS-1345)
- Resolved an issue with overtime prior authorizations for the previous BI. (SPDEXPRS-1380)
- Researched future functionality to add billing modifiers to SDs. (SPDEXPRS-1340)

## **Authorizations:**

- Added ancillary services and new modifiers to POC. (SPDEXPRS-1284, 1307)
- Implemented code to transition foster care into POC. (SPDEXPRS-1283, 1361)
- Updated the FI Fee claim process to add the original service date. (SPDEXPRS-1352)
- Implemented some FMAS process changes, an issue with ETL2 file, as well as resolved issues with suspended tax and trust claims. (SPDEXPRS-1353, 1359, 1356, 1372)
- Modified the code in preparation to move to a two-week pay cycle in the future. (SPDEXPRS-1318)

## **Enrollments:**

- Added fields for the Individual Service Plan (ISP) segments. (SPDEXPRS-1297)
- Started the upgrade to the Oregon Needs Assessment (ONA) pages. Roles for the ONA will be modified to limit users to view only access until the next scheduled release (2.4.3). (SPDEXPRS-1296, 1298, 1301, 1305, 1313, 1314, 1320, 1321, 1322, 1341)
- Converted foster care provider records so that they can be managed and maintained in eXPRS, as well as to allow authorizations and claims for those provider types/specialties. (SPDEXPRS-1282, 1283, 1355)
- Updated the verbiage and process dates on the expiring credential email for PSWs. The email now advises PSWs to submit their renewal information 70 days prior to their expiration date (instead of 55). The system will now send the notices at 120, 90, and 0 days from expiration (instead of 120, 60, and 0 days). (SPDEXPRS-1374)

## **Reports:**

(The task numbers are in parentheses.)



# Release Notes for eXPRS

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- Updated various reports to include the foster care SEs (158, 257, 258) (SPDEXPRS-1366)

## **System Services:**

- Revised the layout, functionality, and content on the “Contact Us” page. (SPDEXPRS-1368)
- Added and revised roles for foster care and ONA functions. (SPDEXPRS-1319, 1362)
- Added a 2,000-character note field to the Manage Roles page. (SPDEXPRS-1347)
- Made some enhancements to the Service Determination and Service Rate pages. (SPDEXPRS-1217)
- Enhanced the code for the RFFS scheduled job so that it will resume running when/if interrupted. (SPDEXPRS-1346)
- Resolved an issue with “none” compare, and fixed some miscellaneous DB bugs around currency. (SPDEXPRS-1323, 1357)
- Updated the Manage User page so that the sort works correctly on the Last Login Date column. (SPDEXPRS-1344)

## **9/14/2017 – v2.4.1 Patch #2**

### **Claims and RFFS Claims:**

- Corrected an issue with the create multiple funding rules page. (SPDEXPRS-1348)

## **8/29/2017 – v2.4.1 Patch #1**

### **Claims and RFFS Claims:**

- Corrected issues with the FMAS interface files for processing FI payments. (SPDEXPRS-1334)

## **8/17/2017 – v2.4.1**

### **Claims and RFFS Claims:**

- Added the service date and updated one of the column headers on the SFMA XACTS screen. (SPDEXPRS-1293)
- Corrected an issue with the refinancing/refunding process for tax claims. (SPDEXPRS-1259)
- Adjusted the rounding on calculations causing claims to suspend with exception code 48. (SPDEXPRS-1253)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Corrected an issue with the provider liability showing as a positive adjustment on the claim instead of a reduction to the paid amount. (SPDEXPRS-1280)
- Fixed an issue with the deletion of funding rules as well as enhanced the editing for duplicate funding rules. (SPDEXPRS-1252, 1292)
- Enhanced the aggregation process to set the claim date range using the first and last service delivery dates rather than using the pay period as the date range. (SPDEXPRS-1260)
- Updated and added logic for OT calculations and recalculations. Established base logic to allow for 2-week payment cycles. (SPDEXPRS-1245, 1274, 1281)
- Cleaned up the Encounter menu and removed functions that are no longer allowed. NOTE: CDDPs moved from Encounters to RFFS claims 1/1/2013, and Brokerages moved from Encounters to RFFS claims on 7/1/13. (SPDEXPRS-1243)
- Corrected an issue with the creation of Trust and Trus2 claims. (SPDEXPRS-1311)
- Added new SD rejection reasons. (SPDEXPRS-1261)
- Added the ability to override SDs that exceed ANA limits. (SPDEXPRS-1256)

## **Authorizations:**

- Corrected an issue with POCs around the calculation for SE150 services. (SPDEXPRS-1303)
- Fixed a display issue on the confirmation page for state users when doing SPA updates. (SPDEXPRS-1262)

## **Enrollments:**

- Implemented the revised import functionality for SIS assessments. (SPDEXPRS-1249)
- Corrected an issue with the “Save Provider Panel” button’s functionality. Users will no longer be able to delete their entire button by clicking the Save button if no changes were made. (SPDEXPRS-1278, 1279)
- Implemented some base functionality to support moving foster care into eXPRS. (SPDEXPRS-1312)
- Added credential information to the login page for PSW providers. It will display the credential information for the primary specialty for each record the PSW’s user account is associated to. (SPDEXPRS-1294)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Made some enhancements to the Oregon Needs Assessment pages. (SPDEXPRS-1247)
- Updated the number of characters allowed on the client liability dollar fields. (SPDEXPRS-1287)
- Enhanced the functionality on the DDEE page's staff drop down list so users can choose active only (default), or all (active and inactive). (SPDEXPRS-1258)
- Fixed an issue when deleting draft DDEE forms. (SPDEXPRS-1308)

## **Reports:**

- Enhanced the DD Adult Eligibility Due Dates report. (SPDEXPRS-1257)
- Updated the query for the CPA Unclaimed Balance report to improve performance. (SPDEXPRS-1288)

## **System Services:**

- Added additional values (500 and 1000) to the Max Displayed drop down field. (SPDEXPRS-1248)
- Completed additional work on the FMAS transition, including ETL file changes. (SPDEXPRS-1254, 1275, 1276)

## **06/15/2017 – v2.4.0 patch #1**

### **Claims and RFFS Claims:**

- Corrected the process for claims that suspend due to exception code 48. (SPDEXPRS-1253)
- Enhanced the OT processing to eliminate unnecessary steps. (SPDEXPRS-1264)

## **5/16/2017 – v2.4.0**

### **Claims and RFFS Claims:**

- Added new exception codes for overtime and tax claims. (SPDEXPRS-1241)
- Fixed the binocs used for searching the service location field. (SPDEXPRS-1220)

### **Authorizations:**

- Restructured case management. A single procedure code will be used for each CM SE. We will no longer use TCM, WCM, PATCM, PAWCM, etc., as of 7/1/17. Each SE, 48, 148, 248, will have a single procedure code effective 7/1/17. SE48 = ORCCM, SE148 = ORBCM, SE248 = ORSCM. Any CM CPAs created for the 15-17 biennium will

(The task numbers are in parentheses.)

# Release Notes for eXPRS

- use the old/current proc codes. All CM CPAs created for the 17-19 BI will use the new proc codes. CM CPAs cannot span across the biennial break. (SPDEXPRS-980)
- Added new procedure codes for Residential services, similar to the changes for Case Management. As of 7/1/17, instead of using All as the procedure code, SE50 will use ORAGH, SE51 will use ORSLV, SE141 will use ORSCU, and SE142 will use ORCGH. (SPDEXPRS-1227)
  - Enhanced the balance checking when approving CPAs. This should eliminate time out errors when CPAs are submitted. (SPDEXPRS-1165)
  - Modified the web service for service eligibility to use the dates on the authorization as part of the call. (SPDEXPRS-1230)
  - Fixed an issue with the View CPA page. (SPDEXPRS-1221)
  - Additional changes to relief care services. (SPDEXPRS-1233, 1234)
  - Added some enhancements for Plan Of Care. (SPDEXPRS-1219)
  - Removed the units and frequency fields for the Service Prior Authorizations from several pages. That information is contained in the service agreement. (SPDEXPRS-1240)
  - Enhanced the Plan Of Care page to allow the user to select the SPA statuses to include. It now defaults to only showing Draft, Pending, and Accepted lines. The user has the option to select then display Withdrawn and Voided lines. (SPDEXPRS-1225)
  - Reinstated the employer relationship edit on the SPA. (SPDEXPRS-1229)
  - Removed OR502 from the POC benefit limit for SE150. (SPDEXPRS-1235)
  - Implemented new functionality and enhancements to existing functionality around the POC and FMAS vendor transition. (SPDEXPRS-1107, 1166, 1206, 1210, 1228)

## **Enrollments:**

- Implemented a new field to display PSW provider's hourly cap. By default, new PSW records will be created with a 40-hour cap, effective 9/1/16 – 12/31/9999. ODDS staff will be able to change the cap as needed. (SPDEXPRS-1215)
- Removed the unused web service for client DD eligibility. (SPDEXPRS-1074)

# Release Notes for eXPRS

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- Corrected an issue when managing provider letters. (SPDEXPRS-1224)
- Enhanced the security for the ONA as well as fixed a few minor issues. (SPDEXPRS-1120, 1214)
- Updated the search query for the DD Eligibility Enrollment page and added the standard 20k row limit for search results. (SPDEXPRS-1223)

## **System Services:**

- Corrected the Check Number and Unique Provider ID search fields so they are no longer case sensitive. (SPDEXPRS-1222)
- Enhanced the password reset function to allow the user to submit a correct Identity Verification Answer to have a temporary password sent to them via email. (SPDEXPRS-1205)
- Enhanced the funding rule and service rate pages. (SPDEXPRS-1216, 1232)
- Developed scripts to support the biennial rollover process. (SPDEXPRS-1226)
- Removed the Confirmed Date from the Employment Relationship display. (SPDEXPRS-1231)

## **04/06/2017 – v2.3.3 patch #6**

## **System Services:**

- Fixed an issue to prevent time out errors for the provider expiration notice emails when there's a high volume of emails to be sent. (SPDEXPRS-1237)
- Added logging and triggers for overtime to allow increased monitoring of the OT process. (SPDEXPRS-1238)

## **03/02/2017 – v2.3.3 patch #5**

## **Claims and RFFS Claims:**

- Fixed an issue in the code to handle the retro tax burden process. (SPDEXPRS-1207)
- Added an option to mass submit suspended claims awaiting payment cycles. (SPDEXPRS-1211)

## **02/22/2017 – v2.3.3 patch #4**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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## **Claims and RFFS Claims:**

- Enhanced the retro tax burden process. (SPDEXPRS-1118, 1198)

## **System Services:**

- Updates to the user action logging. (SPDEXPRS-1204)
- Resolved issues with SFMA SFTP process. (SPDEXPRS-1194)
- Final work to complete the transition to the new FMAS vendor. (SPDEXPRS-1107, 1195, 1196, 1197)

## **01/26/2017 – v2.3.3 patch #3**

## **Claims and RFFS Claims:**

- Modified the sort order on the SFMA XACTS display for use by the Office of Financial Services. (SPDEXPRS-1178)
- Enhanced the payment information details to display accurate PSW payment types (check versus direct deposit). (SPDEXPRS-1191)
- Modified the system to better process tax burden claims and recovery of tax claims. (SPDEXPRS-1118, 1160, 1171, 1176)
- Removed the reclassified claims from the FMAS View Claim page. (SPDEXPRS-1177)

## **Authorizations:**

- Modified the copy POC function to set the FMAS vendor as the pay to provider. (SPDEXPRS-1190)
- Completed the coding to accommodate the new FMAS vendor on the POCs and provider panels. (SPDEXPRS-1180, 1181, 1182)

## **Reports:**

- Enhanced the Employment Relationship report. (SPDEXPRS-1183)

## **System Services:**

- Resolved an issue with funding rules around client's MAGI coding. (SPDEXPRS-1169)
- Additional work to accommodate the new FMAS. (SPDEXPRS-1168, 1170, 1172, 1173, 1174)

## **01/04/2017 – v2.3.3 patch #2**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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## **System Services:**

- Final changes to accommodate the change in FMAS vendor. (SPDEXPRS-987, 1115, 1118, 1167, 1168)

## **12/23/2016 – v2.3.3 patch #1**

## **Claims and RFFS Claims:**

- Prepared for the ER information with the previous fiscal intermediary to expire. (SPDEXPRS-1110)
- Resolved issues with the FMAS authorizations and claims for the transition. (SPDEXPRS-1159)

## **Authorizations:**

- Resolved issue with draft SPAs crossing over the transition date. (SPDEXPRS-1157)
- Fixed an issue with the SPPC 20-hour cap. (SPDEXPRS-1158)
- Prepared for the update of all FI fee SPAs with TNT to end to accommodate the transition. (SPDEXPRS-1155)

## **System Services:**

- Implemented final changes to support the change in the FMAS vendor. (SPDEXPRS-1107, 1160)

## **12/15/2016 – v2.3.3**

## **Claims and RFFS Claims:**

- Added State Plan Personal Care (SPPC) to POC, using OR502 for dates of service on or after 1/1/17. (SPDEXPRS-1134)

## **Authorizations:**

- Removed SPA validation around FMAS employment relationship. (SPDEXPRS-1113)
- Added State Plan Personal Care (SPPC) to POC, using OR502 for dates of service on or after 1/1/17. (SPDEXPRS-1134)
- Added base functionality to allow foster care services in eXPRS, tentatively set to start 7/1/17. (SPDEXPRS-1071)

## **Enrollments:**

- Removed a five year edit on the SIS / ReBAR pages. (SPDEXPRS-1145)
- Corrected an issue with the expiring provider notice process. (SPDEXPRS-1150)

## **System Services:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Implemented final changes to support the change in the FMAS vendor. (SPDEXPRS-1107, 1111, 1112, 1114, 1115, 1116, 1117, 1132, 1144, 1156)
- Added additional functionality to assist with reconciliation. (SPDEXPRS-987)
- Enhanced the burden and PLA recovery processes. (SPDEXPRS-1118, 1125, 1127)

## **12/01/2016 – v2.3.2 Patch #4**

### **Claims and RFFS Claims:**

- Corrected an application error caused by future dated travel time entries. (SPDEXPRS-1136)
- Enhanced the recoupment process for burden claims. (SPDEXPRS-1125)

### **System Services:**

- Implemented additional changes to support the upcoming change in the FMAS vendor. (SPDEXPRS-1107)
- Modified the SFMA process with recoupment of overpaid PLAs. (SPDEXPRS-1127)
- Updated the DOB edits and validations. (SPDEXPRS-1143)

## **11/04/2016 – v2.3.2 Patch #3**

### **Claims and RFFS Claims:**

- Corrected the processing for provider liability accounts (PLAs) for specific claim types. (SPDEXPRS-1126)
- Added a new claim view page for FMAS vendors. (SPDEXPRS-1102)
- Corrected edits around overlapping service delivery entries for attendant care. (SPDEXPRS-1131)

### **Authorizations:**

- Enhanced the editing around the supplemental credentials (enhanced/exceptional, etc.). (SPDEXPRS-1128)
- Corrected the editing around the OR526 NA/ZE modifiers. (SPDEXPRS-1131)

### **Enrollments:**

- Enhanced the editing around the supplemental credentials (enhanced/exceptional, etc.). (SPDEXPRS-1128)

### **System Services:**

(The task numbers are in parentheses.)



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- Implemented changes to support a change in the FMAS vendor. (SPDEXPRS-876, 1107, 1109)

## **09/29/2016 – v2.3.2 Patch #2**

### **Claims and RFFS Claims:**

- Further enhanced the process for Over Time claims, including cross-system claims.

## **09/27/2016 – v2.3.2 Patch #1**

### **Claims and RFFS Claims:**

- Added additional edits and functionality to process cross-system Over Time claims.

## **09/15/2016 – v2.3.2**

### **Claims and RFFS Claims:**

- Implemented cross-system processing between eXPRS and the mainframe for OT claims. (SPDEXPRS-1039)

### **Authorizations:**

- Refactored the Provider Prior Auth to allow approval of PPAs that have a modifier other than NA. (SPDEXPRS-1094)
- Implemented changes to the POC procedure codes, OR507 and OR508. (SPDEXPRS-1092)
- Resolved an issue with service deliveries balancing to the ANA and employment limits. (SPDEXPRS-1106)
- Implemented new procedure codes and modifiers for use in Plan of Care.

### **Enrollments:**

- Implemented new functionality to automatically send emails to PSWs who have expiring credentials (which includes the CHC and PEAA). The job will run daily at 8:00 a.m., and will send an email to any provider who has any portion of their credential set to expire in either 60- or 120- days. (SPDEXPRS-1088)
- Corrected an issue with the age skip logic for the new Oregon Needs Assessment module. (SPDEXPRS -1100)
- Implemented new provider types and specialties.

### **Reports:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Updated the Provider Status Report to include the user account email address for PSW providers. (SPDEXPRS-1101)
- Updated the timesheets to correct a typo and header information for mileage services. Also added a print button that should be available in various browsers. (SPDEXPRS-1095)

## **System Services:**

- Added additional edits to allow special characters in email address fields. (SPDEXPRS-1103)
- Enhanced the data scrambling in the Practice environment to include the Oregon Needs Assessment module. (SPDEXPRS-1100)

## **08/14/2016 – v2.3.1 Patch #2**

### **Authorizations:**

- Implemented additional changes to the print functionality for timesheets. (SPDEXPRS-1090)

## **08/11/2016 – v2.3.1 Patch #1**

### **Authorizations:**

- Implemented a change to the print functionality for timesheets to eliminate the reliance on the business object server. (SPDEXPRS-1090)

### **Enrollments:**

- Added enhancements and fixes for issues with the Oregon Needs Assessment. (SPDEXPRS-1089)

## **08/04/2016 – v2.3.1**

### **Claims and RFFS Claims:**

- Added functionality and processing to support overtime claims for personal support workers. (SPDEXPRS-995)
- Modified the nightly job that submits suspended SDs and claims to only submit claims that fall within the timely filing edits. (SPDEXPRS-1081)
- Added additional fields to the View Claims pages to display FI payment information when applicable. (SPDEXPRS-199)

### **Authorizations:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Enhanced the attachment of documents to various areas of eXPRS. (SPDEXPRS-1073)

## **Enrollments:**

- Implemented framework for the Oregon Needs Assessment functionality coming in future releases. (SPDEXPRS-1050)
- Added some enhancements for Level of Care and DD Eligibility Enrollment pages. (SPDEXPRS-1069, 1079)

## **System Services:**

- Implemented a template table for managing attachments in eXPRS. (SPDEXPRS-1051)
- Implemented some tools to track and analyze system performance. (SPDEXPRS-1072)
- Conducted load testing of the application. (SPDEXPRS-713)
- Updated the Help Menu structure. Added several new and updated documents. (SPDEXPRS-1080)

### **06/16/2016 – v2.3.0 Patch #3**

#### **Claims and RFFS Claims:**

- Updated the service delivery submission process to bypass Pending as a status, if the user's role allows the approval of SDs.

### **06/14/2016 – v2.3.0 Patch #2**

#### **Claims and RFFS Claims:**

- Updated the automatic daily reprocessing job so that SDs will go to Pending when review is required.
- Corrected an issue where SDs for CIIS only clients were failing.

#### **System Services:**

- Fixed an issue with access to client liability accounts. Permission to the CLA pages will be restored 6/15/16.

### **06/07/2016 – v2.3.0 Patch #1**

#### **Claims and RFFS Claims:**

- Corrected the error with generic provider authorizations, SDs, and claims.
- Corrected the issue preventing the ability to void SDs.

#### **Authorizations:**

- Corrected the error with generic provider authorizations, SDs, and claims.

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Updated the balancing edits for SPAs. (SPDEXPRS-1065)

## **Enrollments:**

- Fixed an issue with displaying some attachments (such as on the BA lines).
- Enhanced the provider process to eliminate duplicate updates to the local provider data. (SPDEXPRS-1066)

**05/26/2016 – v2.3.0**

## **Claims and RFFS Claims:**

- Corrected some outstanding issues with Travel Time claims, added the “Max Display” field to the search page, added functionality to prevent the voiding of paid SDs that are bookend entries for travel time claims (travel time claim must be voided first), and added the ability for state users to add cross-system travel claims. (SPDEXPRS-1031)
- Updated the process for SDs to read the correct provider credential segment for the applicable provider type/specialty. (SPDEXPRS-1033)

## **Authorizations:**

- Changed the edit for future dated SDs (date or time). Service deliveries with future dates or future times are no longer saved. Instead an error message is returned. (SPDEXPRS-1054)
- Updated how the system was reading the provider credentials when creating the travel time authorization. (SPDEXPRS-1031)
- Implemented changes around the Plan of Care to address known issues that were preventing the successful submission and updates to POCs and SPAs. Added new data fields on the view SPA page to show who created it, and when a service line was added to a POC. (SPDEXPRS-1033)

## **Enrollments:**

- Changed the way the data is displayed on the View Client Liability page to show the client liability account balance (or \$0) after claims have processed against the CLA. (SPDEXPRS-1021)
- Updated the drop downs to include additional values on the DD eligibility and enrollment pages. (SPDEXPRS-1022)
- Added functionality to allow entry and updates to DD eligibility information, which is displayed on the View Client page. Users can

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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hover over some fields to see expanded information. (SPDEXPRS-970, 971, 972)

- Corrected an issue impacting the test environment for letters associated to the ReBAR module. (SPDEXPRS-1035)

## **System Services:**

- Updated various aspects of eXPRS to ensure functionality with IE11. (SPDEXPRS-1048,1049)
- Refactored the user action logs. (SPDEXPRS-1061)
- Refactored the attached document processes. (SPDEXPRS-1029, 1051)
- Modified the nightly suspended claim reprocessing job to only submit suspended claims that are up to two years from process date and added a 'job completion' email for when the process finishes. (SPDEXPRS-1036)
- Created an automated process to submit suspended SDs daily, in conjunction with the suspended claims reprocessing job. (SPDEXPRS-1027)
- Reviewed and implemented a security restructure and alignment for POC. (SPDEXPRS-1045)
- Implemented some changes to optimize the system to help improve response times.

## **4/14/2016 – v2.2.3 Patch #5**

### **Authorizations:**

- Corrected an issue with the POC split authorization function. (SPDEXPRS-1059)

### **System Services:**

- Corrected an issue with the POC FI fee process. (SPDEXPRS-1060)

## **3/20/2016 – v2.2.3 Patch #4**

### **Claims and RFFS Claims:**

- Corrected the data in the Paid Date column under the Payment History section when viewing a claim. It was showing the paid amount instead of the payment date. (SPDEXPRS-1042)

### **Authorizations:**

- Corrected several issues with Plan of Care and travel time. (SPDEXPRS-1038)

(The task numbers are in parentheses.)

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- Updated the balancing reconciliation to the SEPA for travel time claims. (SPDEXPRS-1037)

## **Enrollments:**

- Updated the provider enrollment status code from one character to many characters to align with the MMIS change to a three-character status code. (SPDEXPRS-1016)
- Updated tables to correspond with the closure of IC provider records, specialty 74-734. (SPDEXPRS-998)

## **System Services:**

- Fixed an issue with attaching letters in the non-production environments (test, dev, uat, sim). (SPDEXPRS-1040)

## **2/16/2016 – v2.2.3 Patch #3**

### **Claims and RFFS Claims:**

- Added SE145 as a service for PPA allotments. (SPDEXPRS-1015)
- Added the travel time components for travel claims effective 1/1/16. (SPDEXPRS-1003)
- Removed the edit that prevented entry of RFFS claims for the prior biennium 90-days after the contract closed. (SPDEXPRS-1017)

### **Authorizations:**

- Corrected some bugs in the plan of care module from previous releases. (SPDEXPRS-1018, 1023)
- Reenabled the ability to void a FFS CPA that still has approved claims. (SPDEXPRS-1025)
- Disabled the use of the generic provider for certain services in plan of care. (SPDEXPRS-999)

### **Reports:**

- Resolved some issues with the Provider Status report. (SPDEXPRS-1002)

## **1/5/2016 – v2.2.3 Patch #2**

### **Claims and RFFS Claims:**

- Corrected an error on the SD entry page when the mileage entry exceeds the character limit.
- Updated the calculation on the proration for group services for procedure code OR507.

### **Authorizations:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Revised the error message when a SPA date range crosses over a date break in the rate entries.
- Corrected issue in POC authorization and SD billing eligibility edits for SE248 CII Only clients.

## **Enrollments:**

- Corrected an issue with recording capacity information for SE50 sites.

## **12/17/2015 – v2.2.3 Patch #1**

### **Claims and RFFS Claims:**

- Corrected an issue with the Daylight Savings Time when creating SDs to allow 25 hours for 11/1/15. Entries will suspend and must be overridden by state staff. (SPDEXPRS-1014)
- Enhanced the claim query to improve response time. (SPDEXPRS-1007)

### **Authorizations:**

- Revised the display of service hours/units on the SD pages. (SPDEXPRS-1010)

### **Enrollments:**

- Corrected an issue with provider address entries for different address types. (SPDEXPRS-1013)

### **System Services:**

- Fixed an issue with enrolling users with an apostrophe in their name. (SPDEXPRS-1012)
- Resolved the display of the last updated by/created by and timestamps on several pages. (SPDEXPRS-1008, 1009)
- Resolved the issue that was preventing users from attaching documents in certain areas. (SPDEXPRS-1006)
- Updated the Program Code page to display the selected code. (SPDEXPRS-1004)

## **12/11/2015 – v2.2.3**

### **Claims and RFFS Claims:**

- Corrected an issue with the Daylight Savings Time when creating SDs. (SPDEXPRS-889)
- Updated the service eligibility validation on POC claims. (SPDEXPRS-978)
- Changed the time entry for SDs to allow exact time entry as well as allow mileage entries to the tenth of a mile. Time entry allows a 15-

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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minute overlap; any overlap greater than 15 minutes will suspend. (SPDEXPRS-977)

- Modified the PSW Claim View and search pages to allow PSWs to search for claims for all of their provider numbers and added the SFMA Run ID as a search criteria field. (SPDEXPRS-942, 948)

## **Authorizations:**

- Enhanced the hover information for provider number and links on the POC pages. (SPDEXPRS-877)
- Updated the service exclusion edits for CPAs and POC services. (SPDEXPRS-976)
- Resolved an exception for PA Adj # searches if the entry contained a space. (SPDEXPRS-981)
- Added the exception messages to the View SD detail page. (SPDEXPRS-946)
- Refactored the Prior Auth Status searches. (SPDEXPRS-944, 974)
- Updated the Supplemental Trust rate. (SPDEXPRS-1000)
- Corrected a printing issue for the SDs. (SPDEXPRS-996)
- Enhanced the timesheet. (SPDEXPRS-990)

## **Enrollments:**

- Enhanced the provider credential validations for POC authorized services. (SPDEXPRS-968)

## **Reports:**

- Updated the Provider Status Report. (SPDEXPRS-950)

## **System Services:**

- Modified the End Reason Code and description for DD Eligibility and Enrollment pages. (SPDEXPRS-989)
- Corrected the functionality when searching for contracts using the binoculars on the State's Create Allotment Claim page. (SPDEXPRS-982)
- Optimized the claim balancing DB queries. (SPDEXPRS-893)
- Updated the Help Menu. (SPDEXPRS-963)
- Added the ability to create new attachment types for the provider attachments. (SPDEXPRS-920)
- Added a 'focus' to the Find button on several pages so that pressing enter will activate the Find. (SPDEXPRS-992)
- Added base functionality for travel time reporting. (SPDEXPRS-983)
- Modified the rate increase page to allow for use with POC authorizations. (SPDEXPRS-986)

(The task numbers are in parentheses.)



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- Updated the MAGI funding rule validations. (SPDEXPRS-940)
- Updated the PCA lines associated with SE141 claims. (SPDEXPRS-500)

## 8/20/2015 – v2.2.2 Patch #5

### Claims and RFFS Claims

- Updated the aggregation process to set the date correctly on overnight claims. (SPDEXPRS-957)
- Enhanced the provider liability recovery for PSWs around the recoupment percent (5%/100%). (SPDEXPRS-956)
- Set the system to allow certain codes to overlap (e.g., OR401 W5/W6 can be allowed with OR507). (SPDEXPRS-955)
- Set the Submit button to grey out after being clicked to prevent creation of duplicate SDs. (SPDEXPRS-959)

### Authorizations

- Updated the coding around the SPA rate increase, unit updates, and split plan line/SPA functionality. (SPDEXPRS-924, 955)

### System Services

- Fixed an issue with the “Forgot your password?” function that was returning an application error if the email address was invalid. (SPDEXPRS-958)

## 8/14/2015 – v2.2.2 Patch #4

### Claims and RFFS Claims

- Corrected an issue with the aggregation cycle spanning an extra day. (SPDEXPRS-957)

### Authorizations

- Completed ability to use the new SPA rate increase and split functionality for state staff. (SPDEXPRS-915, 924)

### System Services

- Updated the PLA recovery for PSWs. (SPDEXPRS-956)
- Fixed an application error on the Forgot Your Password process. (SPDEXPRS-958)

## 8/7/2015 – v2.2.2 Patch #3

## 7/30/2015 – v2.2.2 Patch #2

### Claims and RFFS Claims

- Updated funding determination for MAGI clients. (SPDEXPRS-753)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Corrected issues around the aggregation process creating claims thru the whole pay period even if the authorization ends prior to that date. (SPDEXPRS-952)

## Authorizations

- Corrected an application error when submitting a SPA on a POC with no FI line. (SPDEXPRS-935)
- Enhanced editing on POC and SE48 CPAs to prevent application error and to read multiple CM CPAs. (SPDEXPRS-951)
- Optimized the submit process for multiple SPAs and prevent submission of same auth multiple times. (SPDEXPRS-943, 945)

## Enrollment

- Updated drop down values on DD Eligibility Enrollment pages. (SPDEXPRS-947)

## 7/2/2015 – v2.2.2 Patch #1

## Claims and RFFS Claims

- Updated the aggregation process. (SPDEXPRS-934)
- Corrected an error on the Daily SD Entry page for when a user deletes the data entered before clicking Save All. (SPDEXPRS-938)
- Added back the total units on the Review SD page. (SPDEXPRS-927)
- Added the provider name on the Submit SD confirmation page. (SPDEXPRS-929)
- Omitted the time validation for mileage and events. (SPDEXPRS-931)
- Added “0” as a valid value for direct support hours. (SPDEXPRS-219)

## Authorizations

- Updated editing to prevent plan lines from being reduced below SPA units. (SPDEXPRS-933)
- Corrected an application error when submitting Draft SPAs. (SPDEXPRS-220)
- Added functionality to end a POC with an active FI line with an end date 6/30/15 or earlier. (SPDEXPRS-937)
- Fixed the SPA frequency from reverting to the default value regardless of what the user entered. (SPDEXPRS-926)
- Added procedure code OR512 to SE150. (SPDEXPRS-930)
- Added permission for state staff to view and submit draft FI SPAs. (SPDEXPRS-932)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Enhanced the “Copy” function for POCs for upcoming plan year. (SPDEXPRS-57)

## **Enrollment**

- Fixed an issue with the calendar on the DDEE page. (SPDEXPRS-221)

## **Reports**

- Updated the coding for reports for the new BI. (SPDEXPRS-936)
- Corrected an issue where the Provider Status report was not exporting to Excel. (SPDEXPRS-928)

**6/18/2015 – v2.2.2**

## **Claims and RFFS Claims:**

- Enhanced processing adjustments for claims paid thru the fiscal intermediary. (SPDEXPRS-892, 894)
- Added a new Action Log section for service deliveries. New page “Service Delivered Detail View” is accessed thru the SD ID hyperlink on the View SD list. (SPDEXPRS-821)
- Enhanced the editing to not allow future time entries. (SPDEXPRS-890)
- Redesigned the Daily Service Delivery page. (SPDEXPRS843)
- Incorporated editing for Daylight Savings when processing SDs. (SPDEXPRS-889)

## **Authorizations:**

- Finalized the copy functionality for POCs. (EXPRSPOC-57)
- Added a new field for Direct Support Hour reporting for procedure code OR401. Impacts SD entry pages and the SD import process. (SPDEXPRS-914)
- Implemented SE145, CIIS Service Deliveries and claims (SPDEXPRS-908).
- Enhanced the ANA editing to allow mid-month ISP changes. (SPDEXPRS-864)
- Incorporated Initial development to allow “split” functionality for POC authorizations. (SPDEXPRS-915)
- Added modifier ZE for use with 2:1 services in POC. (SPDEXPRS-849)
- Removed the edit to pend SPAs that start more than 60 days in the future. (SPDEXPRS-911)

## **Enrollments:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Updated DD Eligibility Enrollment pages to incorporate SE248. (SPDEXPRS-918)
- Added functionality to the provider enrollment process to generate and allow attachment of letters. (SPDEXPRS-846, 847)

## **Reports:**

- Updated the Provider Status Report and will be discontinuing the CHC/PEAA Expiring report. (SPDEXPRS-919)

## **System Services:**

- Added the ability to search for user accounts by email address. (SPDEXPRS-900)
- Added functionality for funding MAGI clients. (SPDEXPRS-753, 905)

**4/28/2015 – v2.2.1**

## **Authorizations:**

- Changed the validation on PPAs to allow updates to RFFS allotment PPAs and to allow negative values on PPAs. (SPDEXPRS-895)
- Activated State Case Management (SE248) and CIIS (SE145) services in POC. (SPDEXPRS-663)
- Updated the edits on Procedure Code OR507. (SPDEXPRS-798)
- Enhanced editing on POC and related pages. (SPDEXPRS-902)

## **Enrollments:**

- Added functionality to support POC rollover work. (SPDEXPRS-810)
- Corrected an edit on the DD Eligibility Enrollment page. (SPDEXPRS-904)

## **System Services:**

- Implemented several enhanced queries to enhance performance issues. (SPDEXPRS-893, 897)
- Added a “Contact Us” page. (SPDEXPRS-898)

**2/26/2015 – v2.2.0**

## **Claims and Encounters:**

- Changed the Daily SE54 Claim page so it doesn't return Service Prior Auth information with the search results. (SPDEXPRS-861)
- Enhanced the query for searching for claims by ICN. (SPDEXPRS-865)
- Modified group service reporting for service deliveries with group pro-rating of services. (SPDEXPRS-214)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Added the ability to mass submit service deliveries on the View Service Delivery page. User must use a status in the search criteria to enable the buttons for action they have permission to. (SPDEXPRS-812)
- Enhanced the entry method for service delivery times. (SPDEXPRS-858) If you key in:
  - 9 and tab out of the field, it converts to 9:00 am
  - 10.15 and click or tab out, it converts to 10:15 am
  - 10.75 and click or tab out, it converts to 10:45 am
  - 11.5 and click or tab out, it converts to 11:30 am
  - 9p and click or tab out, it converts to 9:00 pm
  - 16.75 and click or tab out, it converts to 5:15 pm
  - 18 and click or tab out, it converts to 6:00 pm
  - Anything that is invalid will turn red; for example, type any alpha character other than a or p, or type in five numbers.

## **Authorizations:**

- Added new search criteria to the Review Service Delivery page. (SPDEXPRS-794)
- Added functionality to all POC date range to cross over contract date range. (SPDEXPRS-809)
- Added a 90-day edit for discovery services. (SPDEXPRS-872)
- Corrected an issue with procedure codes not allowing a third decimal point when needed. (SPDEXPRS-845)
- Modified the Provider drop down field when assigning providers on the plan of care. Added a filter field to allow easier searching. (SPDEXPRS-210 and (SPDEXPRS-852)
- Corrected the benefit limit issue for SE150 and SE151. (SPDEXPRS-863)
- Fixed an issue with ending service authorizations. (SPDEXPRS-851)
- Changed the Save/Calculate function on BA lines. (SPDEXPRS-796)

## **Enrollments:**

- Fixed an issue that prevented creation of CPAs for clients not previously enrolled in eXPRS. (SPDEXPRS-831)
- Update MAGI PERC validation. (SPDEXPRS-871)
- Enhanced DD Eligibility and Enrollment pages to accommodate upcoming access by brokerages. (SPDEXPRS-853)
- Modified the eligibility web service to enhance response time. (SPDEXPRS-840)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Added the primary email address to the view provider results. (SPDEXPRS-763)

## **Reports:**

- Created a plan renewal report for POC, “Expiring POC”. (SPDEXPRS-65)
- Created a Provider Status report. The report displays the provider panel members for an organization. It also includes user account information. (SPDEXPRS-735)
- Modified the CHC/PEA report. (SPDEXPRS-841)
- Created a new FI Claims Detail Report. (SPDEXPRS-695)
- Updated the Service Delivered and Mileage reports. (SPDEXPRS-856)

## **System Services:**

- Implemented several enhanced queries to enhance performance issues. (SPDEXPRS-687)
- Enhanced and optimized security queries. (SPDEXPRS-854)

**12/29/2014 – v2.1.3**

## **Claims and Encounters:**

- Enhanced the search page for claims to expand the Procedure Code and Modifier drop down fields.

## **Prior Auths:**

- Corrected the search field functionality for the mass submit page for PPAs. (SPDEXPRS-802)
- Revised the edit and search pages for Service Deliveries. (SPDEXPRS-774)
- Added validation for PSW provider duplicate checking on POCs. (SPDEXPRS-818)
- Enhanced functionality and implemented bug fixes for POC. (SPDEXPRS-807)
- Changed the time format on the Review service delivery page. (SPDEXPRS-813)
- Enhanced claim processing to include FI fee payments, employer tax burden payments, as well as trust benefit payments. (SPDEXPRS-195, 197, 203)
- Implemented logic for group service/proration with service deliveries and claims. (SPDEXPRS-804, 805)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Add functionality to support a staggered implementation date for POC by contract. (SPDEXPRS-823)
- Optimized the processing time for service delivery creation, save, and submit. (SPDEXPRS-816)
- Additional bug fixes and enhancement for POC service delivery and claim processing. (SPDEXPRS-798, 806, 814, 815)
- Revised the DSA dependencies on ANA hours and editing around the DSA services. (SPDEXPRS-803)
- Enhanced the CM to POC validations to allow CM CPA changes without impacting existing POCs. (SPDEXPRS-819)

## **Enrollments:**

- Added base functionality to support brokerage use of the DD eligibility and enrollment pages. (SPDEXPRS-797)
- Revised the permissions to allow users to view clients while excluding the EOR data if they do not have permission to the provider relationship data. (SPDEXPRS-820)
- Added additional column to provider table. (SPDEXPRS-822)
- Created a PSW/IC provider export file. (SPDEXPRS-735)
- Updated and modified the EOR process and edits. (SPDEXPRS-208, 828)

## **Reports:**

- Modified reports to exclude fund adjusted claims. (SPDEXPRS-824)

## **System Services:**

- Implemented changes to the Help menu for PSW information. (SPDEXPRS-825)

**10/28/2014 – v2.1.2**

## **Claims and Encounters:**

- Additional enhancements to incorporate PSW payments into claims process for validation and prior auth balance checking. (SPDEXPRS-125)
- Added additional fields to the search pages for Claims. (SPDEXPRS-777)
- Changed the recipient read to look at MMIS data. (SPDEXPRS-200)
- Added validations for Employer of Record data. (SPDEXPRS-785)

## **Prior Auths:**

- Enhanced the mass submit/accept PPA page and processing. (SPDEXPRS-762)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Added new search criteria fields for PPAs. (SPDEXPRS-761)
- Enhanced the SE drop down for handling multiple procedure codes. (SPDEXPRS-758)
- Added validation for Employer of Record data. (SPDEXPRS-784)
- Enhanced the validation for case management rules for POC. (SPDEXPRS-783)
- Resolved review pending issues due to total service units. (SPDEXPRS-789)
- Resolved provider designation in POC service auths. (SPDEXPRS-776)
- Enhanced and fixed bugs on the Review Service Delivery page. (SPDEXPRS-704, 778)
- Enhanced the Service Delivered search screen. (SPDEXPRS-7713, 778)
- Added functionality to remove uploaded documents (SPDEXPRS-775)
- Enhanced the functionality for voiding claims with service deliveries attached. (SPDEXPRS-205)
- Modified the Review checkbox functionality on the provider line. (SPDEXPRS-788)
- Added additional edit validations for service delivery entries. (SPDEXPRS-772)

## **Enrollments:**

- Maintenance and enhancements to the DD Eligibility and Enrollment pages. (SPDEXPRS-780)
- Added the ability to export the Provider Panel data. (SPDEXPRS-760)

## **System Services:**

- Enhanced the manage user pages and process. (SPDEXPRS-759)

**08/05/2014 – v2.1.1**

*Reinstated Plan of Care Manager roles for Local Auth and Brokerage users.*

## **Claims and Encounters:**

- Enhanced claim processes to incorporate service delivery claim aggregation. (SPDEXPRS-125, SPDEXPRS-659)

(The task numbers are in parentheses.)



# Release Notes for eXPRS

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- Developed and made enhancements for Plan of Care to support the 9/1/14 implementation for employment services provided by agency providers.

## **Prior Auths:**

- Added the ability to copy an existing Plan of Care; note: the new plan cannot have dates that exceed the current contract. (SPDEXPRS-57)
- Developed and made enhancements for Plan of Care to support the 9/1/14 implementation for employment services provided by agency providers.

## **Enrollments:**

- Developed and made enhancements for Plan of Care to support the 9/1/14 implementation for employment services provided by agency providers.

## **System Services:**

- Added notifications for the Brokerage POC Manager and Local Auth POC Manager roles to alert users when a client's eligibility changes. (SPDEXPRS-61)
- Implemented service level cap balance checking for POC services with state override for some services. (SPDEXPRS-50)
- Added additional criteria to funding to rules to accommodate KPlan service funding and MAGI eligibility. (SPDEXPRS-732, SPDEXPRS-741)
- Enhanced the funding rules within eXPRS and enhanced the SFMA process. (SPDEXPRS-743)

**06/26/2014 – v2.1.0**

*Permissions to Plan of Care have been temporarily suspended. You will no longer see this as a menu option on the left-hand menu.*

## **Claims and Encounters:**

- Fixed a bug with the RFFS claims to re-process claims that suspend due to “VSAM” or other system errors to ensure they are ready to be paid.
- Added system functionality to support service delivery entries, review of the entries, and claim processing to support Plan of Care (POC). (SPDEXPRS-125, 126, 136, 659, 704)

## **Prior Auth:**

- Enhanced functionality for supporting POC. (SPDEXPRS-50)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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## **Enrollment:**

- Enhanced and fixed some issues with the DD Eligibility and Enrollment pages. (SPDEXPRS-702, 738)
- Fixed a bug on the SIS Assessment search page. (SPDEXPRS-740)
- Enhanced and added additional functionality to support POC. (SPDEXPRS-715)

## **Reports:**

- Modified the CHC/PEAA Report to allow searches using the provider ID field. (SPDEXPRS-728)
- Developed service delivery reports to support POC. (SPDEXPRS-717)

## **System Services:**

- Added a new section to the Help menu called “POC” as well as a hyperlink to the eXPRS help documents on the login page. (SPDEXPRS-736)
- Updated modules across the system to support POC. (SPDEXPRS-50, 123, 124, 125, 126, 711, 731)

**03/18/2014 – v2.0.1 #2**

## **Claims and Encounters:**

- Enhanced the system to accommodate Plan of Care (POC) claims. (SPDEXPRS-186)

## **Prior Auth:**

- Added functionality to support State Case Management. (SPDEXPRS-663)
- Modified the Service Element drop down list on search pages. (SPDEXPRS-698)

## **Enrollment:**

- Implemented changes to the provider enrollment process to accommodate provider portal use for a future release. (SPDEXPRS-653)
- Further enhanced and fixed previously identified bugs for Plan of Care (POC). (SPDEXPRS-4, 13, 55, 57, 62, 69, 137, 186, 645, 660)
- Implemented bug fixes and enhanced functionality with the DD Eligibility and Enrollment pages. (SPDEXPRS-699)
- Added enhancements and editing for providers to integrate with upcoming POC changes. (SPDEXPRS-573, 630, 672, 673)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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## **Reports:**

- Developed a report for expiring providers. (SPDEXPRS-694)
- Updates to reports to reflect database name changes and developed reports to support Plan of Care. (SPDEXPRS-666, 695)

**02/25/2014 – v2.0.1**

## **Claims and Encounters:**

- Enhanced the editing and added more claim modifiers for absence claims. (SPDEXPRS-691)
- Updated system functionality to allow funding adjustments to claims using the mass adjustment process. (SPDEXPRS-657).
- Corrected a display issue when displaying the results for zero balance Client Liability Accounts. (SPDEXPRS-661)

## **Prior Auth:**

- Added additional functionality and components in preparation for Plan of Care. (SPDEXPRS-25, 26, 118, 119, 132, 134, 187, 635)
- Fixed an Insufficient Funds error when ending SE48 and SE148 CPAs where there were paid claims. (SPDEXPRS-696)

## **Enrollment:**

- Corrected some issues with, and enhanced functionality on, the DD Eligibility and Enrollment pages. (SPDEXPRS-665)
- Updated the procedure codes for SIS Assessments to accommodate WCM and PAWCM case management CPAs. (SPDEXPRS-692)
- Enhanced the pages and fixed some bugs for managing providers. (SPDEXPRS-648, 676, 671, 678)

## **Reports:**

- Updated a couple of RFFS reports. (SPDEXPRS-580, 674)

## **System Services:**

- Added procedure and modifier codes to service relationship table. (SPDEXPRS-675)
- Fixed a bug on the manage user page when no role had been selected. (SPDEXPRS-677)

**10/14/2013 – v2.0.0**

## **Claims and Encounters:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Added a new modifier “WCM” for RFFS claim processing. (SPDEXPRS-597)
- Fixed some issues in the claim search where an exception error was returned when claim type “Allotment” was selected in the search criteria, as well as including Exception Code and Suspense Location in the search if entered. (SPDEXPRS-627)
- Corrected an exception error when viewing RFFS claims. (SPDEXPRS-626)

## **Prior Auth:**

- Added a new modifier “WCM” for Waivered Case Management. (SPDEXPRS-587, 597, 598)
- Enhanced the framework for POC. (SPDEXPRS-50, 52, 54, 56)

## **Enrollment:**

- Developed and fine-tuned the Provider Import tool to allow mass load of PSW providers. (SPDEXPRS-567)
- Enhanced provider enrollment functions to include Personal Support Workers. (SPDEXPRS-573)
- Fixed some issues on the Client Assessment pages related to the document type ‘label’ and another error with client prime. (SPDEXPRS-628, 632)
- Enhanced the validation for case management CPAs to incorporate Service Eligibility changes. (SPDEXPRS-587)

## **Reports:**

- Updated the RFFS Claims Summary report to display the correct rate for SE148. (SPDEXPRS-633)

## **System Services:**

- Updated Service Determination tables and screens to include new procedure codes and modifiers. (SPDEXPRS-594)

**7/8/2013 – v1.11.1**

## **Claims and Encounters:**

- Added a “Copy” button to allow copy of denied encounters and RFFS claims. (SPDEXPRS-561)
- Added the prime number to list of results for FFS and RFFS claims. (SPDEXPRS-579)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Corrected an issue in how the suspended due to exhausted PLA encounters are displayed on the view encounter page. (SPDEXPRS-562)
- Changed SE148 from an encounter and allotment model to the new Rationed Fee-For-Service (RFFS) model. (SPDEXPRS-581)
- Corrected a bug that was allowing Absence Claims to be created for future dates. (SPDEXPRS-596)
- Enhanced the reclassification/funding adjustment process for claims. (SPDEXPRS-578)

## **Prior Auth:**

- Updated existing reports to reflect the new RFFS model. (SPDEXPRS-67)
- Enhanced the Remittance Advice Monthly report. (SPDEXPRS-553)

## **Enrollment:**

- Enhanced the provider pages to accommodate additional verifications and tracking of the Criminal History check and Provider Enrollment Agreement signature dates. (SPDEXPRS-143, 150, 573)

## **Reports:**

- Updated existing reports to reflect the new RFFS model. (SPDEXPRS-67, 580, 582, 535)
- Enhanced the Remittance Advice Monthly report. (SPDEXPRS-553)
- Corrected an issue with the CPA Unclaimed Balance report where not all CPAs had hyperlinks to the associated CPA. (SPDEXPRS-593)

## **System Services:**

- Fixed the Deactivate button on the Manage User page. Using the button will not correctly deactivate the roles as well as the actual user account. (SPDEXPRS-592)
- Added the framework for incorporating the SNAP tool in eXPRS. (SPDEXPRS-541, 542)
- Created the framework for rate authorization based on assessment data. (SPDEXPRS-18, 19, 20, 21, 22, 23, 53, 155, 574)
- Completed work for the biennial rollover from 11-13 to 13-15. (SPDEXPRS-503)
- Corrected the SIS Assessment Update notification. (SPDEXPRS-560)

**3/28/2013 – v1.11.0**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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Added a new section to the Help Menu under How To for the SE 48 RFFS pages. In addition, many documents have been updated; new and updated documents are indicated with a splat.

## **Claims and Encounters:**

- Corrected an issue with the automatic processing of the RFFS claims for the 15<sup>th</sup> and last day of each month. (SPDEXPRS-108)
- Added the SFMA Run ID field to the RFFS Claim pages. (SPDEXPRS-504)
- Revised the method for correcting claims for SEs 50, 51, 142, and 143. When the Correct button is selected, after confirming the request, the page returns to a “Enter Claim Service Dates” page. The user then has the option to enter a single claim or multiple claims (within the dates of the original claim), with the option to select a modifier. This will allow the system to tie an original voided claim to multiple replacement claims. (SPDEXPRS-460)

## **Prior Auth:**

- Enhanced the Submit CPA page to allow state users to approve pending CPAs en masse. Renamed the left-hand menu option from “Submit CPAs” to “Mass Process CPAs”. (SPDEXPRS-54)
- Fixed an error when creating negative PPAs. (SPDEXPRS-544)
- Added a new modifier for SE57 for Behavior Consultation. (SPDEXPRS-537)
- Updated an error message on the create service rate page when a new service element has a future start date. (SPDEXPRS-455)

## **Enrollment:**

- Fixed a bug to allow updates to contacts in the provider module. (SPDEXPRS-512)
- Added a new Assessment Assignment module for tracking assessments. (SPDEXPRS-268)
- Enhanced the DD Eligibility and Enrollment pages. (SPDEXPRS-514 and SPDEXPRS-515)

## **Reports:**

- Corrected an issue on the remittance advice report where the summary page was calculating the total incorrectly. (SPDEXPRS-545)
- Enhanced and added separate security permissions for the RFFS Payment Detail report as well as the RFFS Provider Payment Summary Report. (SPDEXPRS-502)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Enhanced the CM Participation report to allow users to pull the report one fiscal year at a time, or as a full biennium. (SPDEXPRS-233)
- Created a new sub-report for the CPA Unclaimed Balance report. The sub-report is a Claims Gap report and for the CPA selected on the main report, it will display any dates that do not have an approved claim. (SPDEXPRS-83)

## **System Services:**

- Fixed a display issue on the manage user page where one field overlapped another. (SPDEXPRS-506)
- Updated the View Service Element page so that future dated SEs are displayed. (SPDEXPRS-508)

**12/19/2012 – v1.10.3**

## **Claims and Encounters:**

- Modified the Create Daily SE54 Claims page. If an accepted claim has already been filed for a specific day, there will not be a check box in that column for that client and instead a green A will be shown. If there is a draft claim already filed for that day, the check box will be available, but the field will be shaded green to indicate a draft claim exists. If there is a suspended claim already filed for that day, the check box will be available, but the field will be shaded pink to indicate a suspended claim exists. The 'How To' guide has been updated. (SPDEXPRS-58)
- Added additional information to the State's Mass Claim Adjustment page and added the new claim type RFFS to the drop-down field. (SPDEXPRS-486)
- Added functionality to allow users to include or exclude deactivated CM/PA Service Coordinators from drop down fields. Defaults to exclude deactivated users. When including deactivated users, they will still be listed alphabetically at the bottom of the list. (SPDEXPRS-275)
- Added new pages to allow entry of SE48 RFFS Claims. The pages are modeled after the Encounter pages and users with rights to the regular encounter pages for SE48 will automatically have access to the new SE48 RFFS Claim pages. Information on how to use the new pages is included in a new 'How To' guide. (SPDEXPRS-108)

## **Prior Auth:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Updated error messages for the prior auth pages. (SPDEXPRS-427)
- Ran a script to end all of the SE48 CPAs as of 12/31/12 in order to support the change to Rationed FFS (RFFS) for Targeted Case Management. As part of the script, created new draft CPAs starting 1/1/13 to continue the enrollment in TCM. (SPDEXPRS-184)
- Ran a script to change the claim type to RFFS on both CPAs and PPAs for SE48 with dates of service 1/1/13 and later. (SPDEXPRS-184)
- Added a new End Reason Code for SE48 “Transition from Allotment to RFFS” to accommodate the CPA changes to support RFFS. (SPDEXPRS-184)

## **Enrollment:**

- Enhanced the View SIS Assessment Report. (SPDEXPRS-432)
- Enhanced the DD Eligibility and Enrollment pages. Includes allowing CDDPs to view the comments in section 10; implementation of field highlighting/shading to indicate fields updated by state staff; as well as a new indicator on the results list to indicate forms that have been updated/changed by state staff. (SPDEXPRS-481, SPDEXPRS-496)
- Updated and enhanced the Provider maintenance pages to allow enrollment and management of individual provider types (i.e., PSWs, HCWs). (SPDEXPRS-208)

## **Reports:**

- Enhanced the default dates and date edits on multiple reports. (SPDEXPRS-468)
- Created a new DD Adult Eligibility Due Date report. (SPDEXPRS-487)
- Enhanced the validations on search criteria fields for DHS Contract Num and Provider ID. (SPDEXPRS-494)
- Corrected the Client Enrollment report to show continuous enrollment for clients. (SPDEXPRS-470)

## **System Services:**

- Added claim type RFFS to accommodate the transition in case management to a rationed FFS model. (SPDEXPRS-108)
- Added the “Service Category Code” drop down field to several state pages used to manage funding rules. (SPDEXPRS-476)
- Enhanced the “Change Password” process to ensure every user selects one of the six standard questions and provides an answer to that

(The task numbers are in parentheses.)



# Release Notes for eXPRS

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question. A new 'How To' guide has been developed and is in the Help menu. (SPDEXPRS-453)

- Modified the Left-Hand Menu. A new menu item, CM/PA TCM Billing, has been added. Depending on a user's access, they will have one or two fly-out options; Encounters and/or SE48 RFFS Claims. (SPDEXPRS-108)

**10/01/2012 – v1.10.2**

## **Claims:**

- Added new fields to the View and Update Claim search pages. The new fields are "Created from" and "Created to". (SPDEXPRS-426)
- Updated the View and Update Claim pages to include "Exception History". This is an expandable section to display all of the current and past exceptions on the claim. (SPDEXPRS-237)
- Made some changes to the accounting processes. (SPDEXPRS-79, SPDEXPRS-247, SPDEXPRS-450)

## **Prior Auth:**

- Formatted numeric fields as currency where applicable on the prior auth pages. (SPDEXPRS-427)
- Corrected a bug with the licensed capacity validation when the capacity changes within a credential date range. (SPDEXPRS-437)
- Modified the SE54 CPAs so that new service data is required on new CPAs. These items are required on new CPAs as well as draft CPAs that are later edited. (SPDEXPRS-431)

## **Enrollment:**

- Enhanced the View SIS Assessment search and corresponding results. (SPDEXPRS-432)
- Enhanced the DD Eligibility and Enrollment pages. (SPDEXPRS-452)

## **Reports:**

- Cleaned up the Report sub-menu. Removed the outdated Mainframe section and moved the PC-20 report under the main Report header as well as under the "Client, Report" sub-menu. (SPDEXPRS-457)
- Redesigned the query for the Remittance Advice reports to improve performance. (SPDEXPRS-428).
- Added the "Contract Number" to the report search criteria for providers. This will allow providers to limit results to one county if desired. (SPDEXPRS-447)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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## **System Services:**

- Updated some Help documents. Added a new Provider section which includes the EFT, aka direct deposit, instructions and form. (SPDEXPRS-461)
- Changed the Max Displayed field on some pages so that the page refreshes the results after changing the value in the drop down after a search has been conducted. (SPDEXPRS-429)

**07/24/2012 – v1.10.1**

## **Claims:**

- Enhanced the Create Daily SE54 Claims page to lock the column header. Now when creating claims, the date row will stay at the top of the page as you scroll down so the dates will be visible at all times. (SPDEXPRS-241)
- Added additional search criteria to the Submit Claims page to find a more specific set of claims for submission. (SPDEXPRS-213)
- Created an edit for claims when the dates claimed do not fall wholly within the CPA dates. Claims that span outside the CPA date range will now deny. (SPDEXPRS-236)
- Revised the edit on services that don't allow more than one day to be billed per claim. The system will now deny claims that exceed the days billed edit. (SPDEXPRS-284)

## **Prior Auth:**

- Enhanced the edits on CPAs for specific services (SEs 50, 141, 142) to allow an update to the site on these CPAs. Changing a site on a CPA will apply to the entire period of the CPA and will update all associated claims. This function will be assigned to a state role only. (SPDEXPRS-82)
- Increased the number of digits allowed for rate and amount fields on some authorizations (e.g., Budget Allocation line and worksheet, PPAs). (SPDEXPRS-195)
- Corrected the allotment PPAs so that the balance to be paid is set by the individual PPA rather than the whole set of PPAs for that contract/provider/SE. (SPDEXPRS-277)
- Tightened the edit on case management CPAs that requires an end reason code for CPAs that do not go thru the biennium, regardless of the ongoing flag value. If an update is made to a CM CPA that should

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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have required an end reason code, one will be required before the other update can be saved. (SPDEXPRS-266)

## **Enrollment:**

- Updated and enhanced the manage provider pages. (SPDEXPRS-192, SPDEXPRS-196, SPDEXPRS-238, and SPDEXPRS-243)
- Changed the edit for the date of birth format on the client search pages. DOB entry must use a m/d/ccyy format. (SPDEXPRS-239)
- Made additional enhancements to the DD Eligibility Enrollment pages and the business process flow. (SPDEXPRS-256, SPDEXPRS-257, SPDEXPRS-259, and SPDEXPRS-261)
- Enhanced the Foster Care section on the DD Eligibility Enrollment pages. (SPDEXPRS-258)
- Added a new field, Assessment Renew Date, to the SIS assessment record. (SPDEXPRS-269)
- Added new search criteria fields on the View SIS Assessment page for the Assessment Renew Date. (SPDEXPRS-250)
- Created new functionality to be able to generate the notice to the client about the Tier determination (Client Letter) and upload the Client Letter to eXPRS. Users who can view the SIS assessment record can also view and print the letter. (SPDEXPRS-252)
- Added the ability to upload the Tier 7 Review Committee's Decision Memo. Users who can view the SIS assessment record can also view and print the memo. (SPDEXPRS-269)
- Added the ability for the state ReBAR team to update the SIS assessment record to reflect the Tier 7 Review Committee's decision. (SPDEXPRS-251)
- Created a notification for users (as defined by their role) which is generated when the Tier and Rate Authorization section is updated by the state ReBAR team. (SPDEXPRS-285)

## **Reports:**

- Created a new Active Payee Provider Report for the State's accounting unit to identify providers who have, or have not, been set up as a payee yet. (SPDEXPRS-273)
- Enhanced the Available Monthly Balance Report for SE53 (excludes LM for now). (SPDEXPRS-242)
- Corrected the Outstanding Provider Liability report so that outstanding provider liabilities now display as expected. (SPDEXPRS-234)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Enhanced the Remittance Advice report queries to speed up processing time. (SPDEXPRS-235 and SPDEXPRS-286)
- Updated the SE54 Daily report to include the amount paid for approved claims on the main report page. (SPDEXPRS-276 and SPDEXPRS-283)

## **System Services:**

- Updated the SFMA Interface file process so it's transferred directly to DAS. **This means that the claim submission cutoff time will change from 3:30 p.m. M-F, to 5:30 p.m. M-F.** (SPDEXPRS-198)
- Fixed the report windows so that if the user's eXPRS window(s) time out, the report window will also time out. (SPDEXPRS-240)
- Changed the ID Verification Question and Answer on the user profile to be a set of questions with free-form entry for the answer rather than free-form for both the question and the answer. New users will have to select one of two questions on their enrollment form. A conversion of existing users will be done at a later date and will coincide with a password change. (SPDEXPRS-127)
- Enhanced the manage user process to better support delegated security when that is rolled out. (SPDEXPRS-130)
- Updated the password change options to ensure the system only allows a maximum of 12 characters on all places a password can be entered. (SPDEXPRS-282)
- Updated the email address edits to ensure the same email cannot be used on multiple user accounts. (SPDEXPRS-290)
- Corrected the processing when expiring a role. Now it should also end date the role on all user profiles as of the expiration date used on the role itself. (SPDEXPRS-220)
- Updated the SFMA process to use the DAS assigned vendor number when applicable. (SPDEXPRS-224)

**03/28/2012 – v1.10.0**

## **Claims:**

- Added additional search criteria to both the Submit Claim page and the state's Mass Adjustment page. This allows users to narrow down the search to return a more specific set of data. (SPDEXPRS-125 & SPDEXPRS-213)
- Corrected a display issue on the Provider Liability page so that each account is only listed once, instead of once for the creation of the PLA

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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and once for each update or reduction to the account. The page will be added back to the user roles so that users can view PLAs again. (SPDEXPRS-169)

## **Prior Auth:**

- Added a new collapsible section to the bottom of the CPA and PPA pages to show claims associated with prior authorization. It does not apply to case management CPAs and encounters. Users can see the same information by searching for claims associated to a CPA or PPA Adj #. (SPDEXPRS-76)
- Tightened the edits on client prior authorizations to prevent any overlap for specific services. (SPDEXPRS-194)

## **Enrollment:**

- Enhanced the edits and corrected some bugs on the provider add and update pages. (SPDEXPRS-156, SPDEXPRS-189, SPDEXPRS-190, SPDEXPRS-192, SPDEXPRS-199)

## **Reports:**

- Created a new SE 54 Daily Claims report. This report shows the number of claims filed against a client's CPAs, with a count by claim status. A sub-report shows all of the claims for that client for the date range pulled. This report is best utilized by pulling one month at a time and comparing attendance records to the claim count. (SPDEXPRS-114)
- Revised several reports to handle the change in SE 54 from a monthly rate to a daily rate. Most reports will now exclude SE 54 data for dates 10/1/11 and after. (SPDEXPRS-89)
- Adjusted a calculation on the case management participation report. (SPDEXPRS-206)
- Modified the way the PC-20 report pulls the information for clients with expiring PC20 plans. (SPDEXPRS-203)

## **System Services:**

- Updated several dollar amount fields on various pages so they are right-justified. (SPDEXPRS-222)
- Enhanced the time-out pop up window. Due to security policies, eXPRS times out after 20 minutes of inactivity. At 19 minutes, a pop up box displays and counts down 60 seconds until it automatically logs the user out. To remain logged in, the user would click Ok, and then have to take some action within eXPRS to remain active. Now when the session is about to expire, the user has the option to "Log me

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- out” or “I’m still here!”. Choosing “I’m still here!” will re-start the 20-minute count down. Please note that if you have multiple windows or tabs open and one times out, they will all time out and each one will require you to log back in. (SPDEXPRS-212)
- Added a new page that displays at login if the mainframe is unavailable. It advises users that some functions will be interrupted until the mainframe is available. (SPDEXPRS-191)
  - Implemented a new module in eXPRS for recording SIS assessment information. (SPDEXPRS-97, SPDEXPRS-138, SPDEXPRS-139, SPDEXPRS-140, SPDEXPRS-141, SPDEXPRS-142, SPDEXPRS-205)
  - Enhanced the weekly encounter processing to process any draft encounters. (SPDEXPRS-197)
  - Started the framework for a new module in eXPRS for DD Eligibility and Enrollment processing. (SPDEXPRS-104, SPDEXPRS-165, SPDEXPRS-166, SPDEXPRS-167, SPDEXPRS-168)

**12/22/2011 – v1.9.5**

## Claims:

- Updated the Create Absence Claim page to not return SE53 CPAs. (SPDEXPRS-99)
- Fixed a bug that didn’t allow the user to click the Draft claim ICN on a newly created claim to view the details and then return to prior page to submit the claims. (SPDEXPRS-5)
- Added an edit to the automatic reprocessing of encounters so that the system will not replace encounters past 12 months from date of service. (SPDEXPRS-90)
- Corrected the process that was causing some encounters to end in Draft status after being corrected. (SPDEXPRS-52)
- Enhanced the claim process for FFS claims that cross from one month into the next. (SPDEXPRS-91)
  - Previously, monthly services could be billed for several months in one claim. Now, if a claim is created spanning multiple months, the system will automatically split it into separate claims (one per month). The ICN will end in 1 for the first claim in the “series”, and the rest of the claims will end in the next sequential number; 2, 3, 4, etc. For example, a claim is

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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entered for 7/15 – 11/15; the system will create the following claims:

- 2011355265043001 (7/15 – 7/31)
  - 2011355265043002 (8/1 – 8/31)
  - 2011355265043003 (9/1 – 9/30)
  - 2011355265043004 (10/1 – 10/31)
  - 2011355265043005 (11/1 – 11/15)
- When searching for claims, using a partial ICN is allowed; so, to find the series of claims, users could search for 2011355265043 or 20113552650430 or 201135526504300.

## **Enrollment:**

- Enhanced the view provider pages. (SPDEXPRS-122 & SPDEXPRS-133).
  - The search page now has an “Include Service Locations” check box; searching by a parent provider number or parent provider name with this option checked will return the parent entry as well as all related children.
  - A filter was added to help navigate the provider type and specialty drop down field. Keying in ‘trans’ will filter the list to only show options that include those characters. It is an exact match; no wild card is allowed.
  - State users will now be able to see the Relationships section for providers. It shows the owner (parent) to service location (children) relationship.
  - The search results list has a couple of new columns:
    - Type = the provider record type
      - EXP – Parent
      - EXL – Service Location
      - EXC – Contact Only
      - EXR – Information or referral provider
    - Beds = the current licensed capacity of a site
  - When viewing a provider, the Credential and Community Based Care (CBC) sections have been revised to show a list view rather than individual blocks for each entry. A black triangle on a section or row indicates additional data which can be viewed by clicking the section header or row to expand the data.

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- The CBC lines now include a count of the current used beds. When all beds are accounted for in CPAs, the number of Used beds will match the Total Beds.
- Users will no longer see the non-functional Update button.

## **Prior Auth:**

- Added user friendly messages when the CPA submit fails if Title XIX or DD eligibility is not available. (SPDEXPRS-126)
- Added additional search criteria to the following pages: SEPA, BA Line, BA Worksheet, CPA, and PPA pages. (SPDEXPRS-53)
  - Additional criteria include:
    - Units (valid values are 1 – 5). Values greater than 1 are only applicable for SE54 searches. All other Services are a monthly service and the units will be 1; leave blank for most searches.
    - Ongoing (y/n drop down). This will help find non-ongoing CPAs that may need to be updated.
  - The SE drop down field has been enhanced to show the SE, the Procedure Code, and the Modifier Code. Also, the drop down will now only list applicable SEs; for example, there are no CPAs for SE56, therefore, it's no longer in the drop down. For services that have multiple selections, a single entry along with the more specific entries was added. For example, SE48 has the current TCM choice as well as the old ADMN option. So, it displays as:
    - 48
    - 48 ADMN/All
    - 48 TCM/All
    - Choosing 48 ADMN/All or 48 TCM/All will only return the CPAs with that Procedure Code and Modifier. Choosing 48 will return both ADMN and TCM when applicable.
  - The Units and Ongoing flag were also added as columns in the search results list. (SPDEXPRS-111)

## **Reports:**

- Date validation was enhanced on all report searches. As you type the date, it will show in red text until a valid date is entered. If the date is still red and you click Find or Search, the field outline will turn red

(The task numbers are in parentheses.)



# Release Notes for eXPRS

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and it will blink a couple of times. The only valid separator in the date field at this time is a forward slash “/”. (SPDEXPRS-3)

- An issue on the Remittance Advice report where the search criteria did not handle same date range search was fixed. If you need to find a report for a single day, you can enter that date in both the Start Date and End Date field. Previously you would have to enter the day and the day before or after the day you were looking for. (SPDEXPRS-154)
- The Payment Detail report now shows the PLA Detail sub-report for allotment only services, such as SE56. (SPDEXPRS-153)
- Client Liability report issues were corrected so the report now reads the contract number and dates entered on the search criteria rather than returning all records regardless of the criteria entered. (SPDEXPRS-129)
- An issue with the State’s Client Discrepancy report was fixed and the report now runs in half the time. (SPDEXPRS-128)

## **System Services:**

- Changed the way the Help documents open. Now they will open in a new window which can be closed when done without affecting your active eXPRS session. However, the active session will still time out after 20 minutes even if you are browsing the help documents. (SPDEXPRS-62)
- Updated the client search. To limit the number of returns, the system will require the user to enter additional criteria so that the results will never exceed 500 returns. When entering the date of birth as criteria, use the following format: mm/dd/yyyy. (SPDEXPRS-151)
- Made a change in eXPRS to accommodate a restriction by the Department of Administrative Services where they can no longer accept the SSN as a tax ID for payments. (SPDEXPRS-78)

**10/28/2011 – v1.9.4**

## **Claims:**

- Modified the Update Claim page so the unit field cannot be updated and added validation to prevent multiple dates on a single SE54 daily claim. (SPDEXPRS-86)
- Enhanced the create SE54 Daily Claim page so that the checkboxes are not shown for dates prior to 10/1/11, dates before or after the CPA’s effective dates, and future dates. (SPDEXPRS-61)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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## **Prior Auth:**

- Added an edit to prevent non-state users from changing the units on an accepted SE54 daily CPA. (SPDEXPRS-84)
- Corrected the claim processing for when the eligibility files are unavailable. If eligibility is unavailable, claims will now suspend. eXPRS automatically reprocesses all suspended claims nightly so if the eligibility (or other suspension) issue has been resolved, the claim will go to Approved and will be included in the following days' payment cycle. (SPDEXPRS-65)
- Fixed a bug when bringing new clients into eXPRS. (SPDEXPRS-98)
- Fixed a bug when searching by prime when someone else has the prime as an alias prime. (SPDEXPRS-112)

## **System Services:**

- Moved to a consolidated provider database. This affects most pages and areas of eXPRS. (SPDEXPRS-4, SPDEXPRS-6, SPDEXPRS-7, SPDEXPRS-8, SPDEXPRS-9, SPDEXPRS-11, SPDEXPRS-12, SPDEXPRS-13, SPDEXPRS-14, SPDEXPRS-15, SPDEXPRS-16)

**9/29/2011 – v1.9.3.65**

*Please note: The Provider Liability pages have been disabled while we correct a bug that was recently introduced. We expect it to be available again on 12/22. The Outstanding Provider Liability Report is available, but only for prior biennium (BI), (even though it is listed in the drop down, it will return no data for the current BI). If you need PLA information prior to 12/22 for this BI, please contact the DHS Service Desk at 503-945-5623 to create a ticket.*

## **Claims:**

- Added functionality to allow users to Copy voided claims. (22208)
- Corrected a bug that prevented users from using the contract number when creating encounters and claims. (21915 & 22308)
- Created a new page for SE54 Daily Claim processing and modified the current create claim pages from allowing SE54 claims with dates of service 10/1/11 and later. (22422, 22433, & 22525)
- Added additional fields to the View PLA pages, enhanced the validation, and corrected an application error on the Update PLA page. (22089, 22235, & 22261)
- Enhanced the state's Mass Adjustment page. (22150)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Changed the accounting process to use funding rules based on the payment date rather than the service dates on a claim. (22435)

## **Prior Auth:**

- Streamlined the PPA submit and approve process for state users. (22375)
- Added edits to the SEPA process to handle multiple SEs in a SEPA where the approval is done by different organizational roles. (22305)
- Removed the ‘Same as last’ option on a BA line. This is now handled by copying a BA line. (22115)
- Fixed an edit that was not handling the reprocessing of claims when the rate was updated on some CPAs. (22351)
- Enhanced the PPA process to allow editing of allotment PPAs. (22084)
- Updated the edits for SE 53 CPAs to ensure CPA managers can edit a draft CPA, and to prevent duplicate or overlapping SE 53 CPAs. (22268 & 22350)
- Corrected a bug that was not allowing users to find SEPAs for services that have specific modifiers. (22568)
- Updated the Client Prior Authorization process to allow daily rate for SE 54. (20962)

## **Reports:**

- Added functionality to the print CPA page so that it prints more like a report. Now the entire note will print rather than just what’s viewable on the page. (22275)
- Corrected a discrepancy on the CPA Unclaimed Balance report when a partial month is entered. (22046)
- Created a Biennium Provider Payment Summary report for state users. (22492)
- Added back the ability to export a report to Excel. (22217)
- Updated the state’s Budget Allocation Review report. (22478)

## **System Services:**

- Added the email address of users to the results list when viewing roles. (22274)
- Added additional documents to the Help menu. These are indicated by a “NEW” splat next to the document name.

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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6/16/2011 – v1.9.2.95

## Claims:

- Added an option to search for claims utilizing an exact date match. Default is not set to exact match. (21702)
- Added the encounter status to the encounter pages. Includes the search criteria fields and results lists. (21962)
- Removed the contract limitation on Provider Liability Accounts. PLAs will now be recovered based on the provider number rather than provider number and contract number combination. (21975)
- Implemented or turned on the claim modifier rules for absence claims. When filing claims that exceed a set limit, the claim will suspend. As of 7/1/11, absence modifiers will no longer apply to SE54 services. (20554)
- Enhanced the Client Liability Account processing for state users. (21670 & 21576)
- Set the end date on all ongoing payee records to a non-expiring date (12/31/9999). (21988)
- Enhanced the flow and processing for the encounter and claim pages. (21443, 21971, 21788, 21620)
- Implemented a crosswalk table for accounting and updated GL index numbers and PCA codes. (22140 & 22076)

## Enrollment:

- Consolidated the action logs on the provider pages. Now there is one action log with separate sections for each component on the provider record. (21582)
- Enhanced the update provider pages to load faster. (21900)
- Corrected an application error when trying to view SEs on a provider record if none exist. (21623)

## Prior Auth:

- Added the dollar amount to insufficient funds messages. (21916)
- Created new options for state users to add, copy, or void an allotment PPA. (21575)
- Added an option to search for Client Prior Authorizations with an exact date match. Default is not set to exact match. (21702)
- Set a new edit to automatically Pend all direct client fee-for-service (FFS) CPAs starting 7/1/11. (21980)
- Add a higher-level authorization (LAB) for future use. (21741)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Corrected an issue on CPA processing for clients with segmented DD eligibility. (21929)
- Enhanced the PPA pages. Now we allow the optional PPA checkmark to be checked or unchecked while the PPA is in Draft status and set an edit to not allow the optional checkmark for allotment services. (21712 & 21792)
- Updated the Procedure Code drop downs on various pages. (21939)
- Updated the state's copy BA line functionality. (21574)

## **Reports:**

- Created a state report to identify discrepancies between CI and eXPRS data. (21627)
- Corrected an issue on the CM/PA PFS report where one encounter could be listed twice if the client had more than one open DHS case. (21948)
- Corrected an application error and enhanced the report query on the RA and Monthly RA reports. (21897 & 21637)

## **System Services:**

- Added several new service elements to eXPRS. Allotment only services include SEs 44, 49, 56, 57, 149, and 156. Allotment and FFS services include 53. FFS services include SE45. (21843 & 22149)
- Added new documents to the Help Menu and included some missing links to existing documents. (21840)
- Implemented a new feature to allow users to switch roles without logging out and logging back in. (21951)
- Corrected an issue with the search when using the "Created By" field. (22024)
- Modified the state's manage user and manage role pages. (21945)
- Updated the functionality of the drop-down fields on the View Service Element pages. (22155)

**3/21/2011 – v1.9.1.34**

## **Claims:**

- Added action logs to the view Client Liability Account page. When viewing or updating a CLA, the user can expand the Action Log to see previous actions taken. (21268)
- Fixed an issue with the state's Create Allotment Claims page to properly use the contract and SE combination as entered. (21624)

## **Enrollment:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Corrected some error messages that erroneously referenced ‘corporate’ phone instead of the applicable phone field. (21498)
- Extended the DD Eligibility information returned when viewing a client’s eligibility. Previously only the current line was returned. Now it returns all lines regardless of effective dates. (21381)
- Changed the drop-down field when adding a service area to a provider record. Instead of defaulting to the first unselected service area for the provider, the field now shows “Select...”. The field is required so if the record is saved without selecting a service area, an error message is returned. (21579)

## **Prior Auth:**

- Added spaces to the BA Worksheet page to separate the words BudgetAllocationWorksheet. (21499)
- Changed the CPA Note field so the default view is the bottom of the text box, displaying the most recent note instead of the top of the text box with the oldest note displayed. (21323)
- Corrected an issue with the CPA notes. Previously, when adding a new CPA, the initial note would be listed twice. (21532)
- Added action logs to the CPA footer page when accessing the CPA from the other pages (for example, from claims, encounters, or CLA). Previously the action log section was only seen when accessing the CPA directly. (21507)
- Added additional SEs to the Budget Allocation line “transfer from SE” field. (21619)
- Fixed an error with the 48 CPA validation process. It was checking for both DD eligibility and service eligibility and should only check for a client’s DD eligibility. (21597)

## **Reports:**

- Added an option to include or exclude zero balance lines on the CPA Unpaid Balance Report and adjusted the logo on the report. (21538 & 21599)
- Changed the header on the PC20 report to omit the branch number. The report is separated by the branch code and having it in the header was misleading. (21355)
- Created a new State only report for the allotment service payments. (21352)

## **System Services:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Changed the way the date search criteria works on the state's Application Error Log page. (21455)
- Added the ability to give view rights to the state users who need to see the user roles and permissions in eXPRS. Previously only users with update rights could see the roles page. (1183)
- Added borders to note text fields to better delineate the text fields. (21509)
- Enhanced the password update process so that the user has to re-read and agree to the DHS security agreement each time the password is changed. (21361)
- Enhanced the password function so that the user doesn't have to log out and log back in when a password change has been completed after logging in. (20667)
- Fixed an issue with the state's "Use as Template" and "Copy roles from" functions so that it doesn't error out if the user has the same role for multiple organizations. (21531)

**1/25/2011 – v1.9.0.46**

## **Claims:**

- Converted the notes on claims to a variable character format. This will enable faster loads on our tables, but should not impact users. (21260)

## **Enrollment:**

- Added notes to the provider sites and service area pages for state use and added the notes to the logging actions so state users can see who made changes to the provider record, including changes to the note field. (21254, 21359)
- Cleaned up shared licenses so that every site and service area has its own license. (21360)

## **Prior Auth:**

- Added an attachment indicator (a paperclip symbol) to SEPAs with attachments. When viewing the SEPA, the individual lines also have a paperclip symbol if there's an attachment. (21251)
- Updated the error message on CPAs when the date range entered is outside the contract period. (21367)
- Updated the way the initial note on a CPA is logged when creating a new CPA. Instead of logging the same note twice (once on the save and once on the submit), it will now show once. (21038)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Fixed the Find Contract binoculars when creating a new PPA. Previously, when you used the binocs and picked a contract, instead of displaying the contractor name, the field was displaying “undefined”. (21365)
- Corrected an issue on the state’s process for mass updates to CPAs for rate increases, rate decreases, or changes in provider or contractor. (21440)
- Updated the error message when manually creating a client liability account and fixed the prime format so it allows CAPS and non-caps entries. (21510)

## **Reports:**

- Added a message to the Remittance Advice report regarding the availability of direct deposit. Includes links to the Department of Administrative Services RA and ACH pages. Also added the links to the Other DD Resource Links document under Help, Other Information. (21407)

## **System Services:**

- Changed the eXPRS page footer to remove the info exprs e-mail address. All questions, concerns, and problems with eXPRS should be reported to the DHS Service Desk as indicated in the footer. (21363)
- Updated the look of the buttons in eXPRS on all pages. The new format has a gradient purple color and the button size is now dependent on the label (no longer have a fixed width). (21417)
- Made some changes to the state’s Manage User pages. (21321, 21364)
- Java 1.5 upgrade work was continued. Most changes should be transparent to the users. (21271, 21501, 21486, 21487, 21488)

**12/14/2010 – v1.8.3.36**

## **Claims:**

- Fixed the buttons on the Update Claim page to match the user’s permissions. Instead of showing all buttons to all users, they are now displayed based on the individual user’s permissions. (20872)
- Updated the CLA page to return a more descriptive message when no record is found for the criteria entered. (20878)
- Daily claim processing has been streamlined and we no longer need to restrict claim or encounter submission times. Removed the “Please do

(The task numbers are in parentheses.)



# Release Notes for eXPRS

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- **not submit claims/encounters between 3:25 - 3:40 p.m., Monday - Friday.**” message from the create claim and encounter pages. (21258)
- Fixed an issue with the Update Claim and Review Encounter pages where the status field was not always refreshing after an update. This only happened when a denied claim or encounter was copied and the copy was then submitted and also returned as denied; instead of showing “Denied” as the status, it still showed as “Draft”. If you re-opened the claim or encounter, the correct status would display. (20958)

## **Enrollment:**

- Added a Note field to the provider site/service area pages to allow state users to explain actions taken. (20666)
- Fixed an issue where the search for client (binocs) was returning the first client’s prime in the list instead of the selected client’s prime. (20984)
- Corrected an issue that allowed multiple/duplicate sites to be created when adding new provider records. (20879)

## **Prior Auth:**

- Fixed the Find CPA page to clear prior search results. Previously, if a user searched for CPAs, then went to a different page and then returned to the Find CPA page, the original results were still being displayed. (20961)
- Enhanced the State’s service eligibility pages to allow for additional search and sort capabilities. (20887)
- Corrected a validation issue in the State’s Update Service Eligibility page. (20429)
- Fixed the user message when updating a pending CPA. No longer includes the ‘persistent store’ verbiage. (20722)
- Corrected the buttons displayed on a PPA (submit, approve, etc.) so they are now based on the user’s permissions. (20771)
- Added edits to the Brokerage Request Date and Assigned Brokerage fields as they should be mutually exclusive. If a CDDP edits a CPA with data in both fields, they will receive an error message and the fix is to remove the BRD and re-save the CPA. (21229)
- Removed the check for client service eligibility for SE48 CPAs; DD Eligibility is what determines SE48 eligibility. (21316)

## **Reports:**

- Added Claim modifiers to claim related reports. (20450)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Created a state-only FFS Full General Fund Payments Report. (21211)

## **System Services:**

- Added the CI person number to state's Update Client page. This will assist in researching possible duplicate client errors. (20850)
- Added a "Use as template" button when modeling a new user after an existing user. This button will copy all of the existing roles to a new user account form. Upon completing and saving the new account, the new user's primary organization will be assigned to the various roles (not the organization from the user who was used as the template). (20712)
- Add SE58 to eXPRS to allow CDDP GF Foster Care Allotment payments as needed. (20963)
- Fixed the Deactivate user button which was not working with Firefox. (21039)
- Corrected a display issue with deactivated users' roles on the Manage User page. (21093)
- Fixed an issue with Windows 7 and IE8 when displaying client information on the View Client page. Previously, the 1st client searched was being displayed for any subsequent client search or selection. (21214)

**10/13/2010 – v1.8.2.56**

## **Claims:**

- Added a new code (MF7) for CPAs and claim processing. (20813)
- Modified the date edits for allotment claims. The system will now allow allotment claims over the 12-month limit to process without suspending (the timely submission edit should only apply to FFS claims). (20664)
- Created an Edit button on the View Claim page. Users with permission to update claims will now have an Edit button that takes them to the Update Claim page from the View Claim page. (20808)
- Added the ability to create allotment claims by specific contract and/or SE. (18958)
- Added a label on the Enter Encounter pages to identify the select/deselect "All" check box. (20772)
- Enhanced the Rate Increase process so that both ongoing and non-ongoing CPAs are selected with one process instead of having to split it out into two processes. (20768)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Implemented new DD Eligibility Rules. If a client is not coded as DD eligible, their claims will remain in Suspended status with a message about the lack of DD eligibility. (19825)
- Corrected an issue with Local Match encounter reprocessing. (20764)
- Corrected a misspelling on the CLA pages. (20840)
- Updated the user messages on the submit claims pages to contain more specific information instead of a generic message when claims do not process thru to Accepted. (20573)

## **Enrollment:**

- Enhanced the View Client page. New information was added and now all of the information is contained on one page, with the option to expand each section or leave it collapsed. Information displayed is determined by the users' roles. (20415)
- Fixed an issue with the Provider Service pages where the service area wasn't displayed in the results list; the user had to open each line to see which service area it was. (20470)
- Enhanced the rate category field. Changes to the rate category field will now be logged and must match the capacity entered. (20423)

## **Prior Auth:**

- Removed the edit on the brokerage request date. Now all CM CPA Managers can update or delete the brokerage request date for their own contract. This action is logged and is displayed at the bottom of the CPA page under "Action Log Entries". (20613)
- Updated one of the CPA end reason codes. Changed "Voluntary Withdrawal by Parent/Guardian" to "Voluntary Withdraw-Self/Parent/Guardian". Converted records with the old value to the new value. (20836)
- Updated the CPA submit and CPA update process (excessive notes were exceeding the maximum allowed characters and causing an application error). A new edit was added that advises the user to shorten or remove the notes in order to save the CPA. (20552)
- Enhanced the state's service eligibility pages. Now allows the user to search and sort by various criteria. (20424, 20601)
- Fixed a time out issue with delete and find CPA. Users who were deleting CPAs caused a lock on the table and their request would time out and return an application error. (20671)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Implemented new DD Eligibility Rules. If a client is not coded as DD eligible, their CPA will remain in Draft status with a message about the lack of DD eligibility. (20762)
- Removed the edit on the CPA processes that would pend a CPA if the new CPA's rate was below the prior CPA's rate. (20822)
- Implemented new web service calls to client eligibility rather than loading and utilizing data in tables. (20763)

## **Reports:**

- Made some enhancements to the 90-Day Referral Report. The report will group the 48 CPAs without a corresponding 148 CPA alphabetically in one section, and then group the 48 CPAs with a corresponding 148 alphabetically in a separate section. (20551)
- Added other SEs to the Outstanding PLA report. Previously the report only included the fee-for-service SEs. (20550)
- Made some adjustments to the State's CM Funding report. (20729)
- Created a CPA Unclaimed Balance report. This report will allow users to see if there are any clients with unclaimed monies. (20592)
- Fixed the RA export to Excel where it was showing html code for the Run ID instead of just displaying the Run ID. Also fixed an issue with the RA where the same report would be displayed even if the user selected a different Run ID from the list. (20547)
- Updated the report sub-grouping and descriptions. (20600)

## **System Services:**

- Standardized the order of the sub-menus. The items listed are based on the user's roles, but now they will follow a standard order; find/view/review, then create/enter, then approve/accept, then update, then submit. (20392)
- Reorganized the Help documents and added a table of contents or index list. The list will also hyperlink to the actual document selected. New and updated documents will be tagged "new" to the right of the document name in the Help menu.

**6/24/2010 – v1.8.1.47**

## **Claims:**

- Added the ability to use modifiers on FFS claims. This allows providers to submit claims reflecting a clients' absence from the service. Modifiers can only be used on claims with dates of service

(The task numbers are in parentheses.)

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7/1/10 or later. To access this feature, use Claims, Create Absence Claims. (17161)

- Added a message to the create claim and enter encounter pages reminding users to avoid creating or submitting claims and encounters between 3:25-3:40 p.m., Monday – Friday. (19749)
- Enabled state users to update notes on claims regardless of the claim's status. (19343)
- Enhanced the state's Mass Adjustment page (added a Reset button, added additional columns to the results page, and fixed the default criteria when users initially access the page). (19657)
- Added an edit to prevent encounters from being entered when an existing draft or suspended encounter already exists. (20191)
- Aligned the total amounts on the View Claims page. Previously, the Denied claims total was offset from the other totals. (20271)

## **Enrollment:**

- Removed the “Register New Provider” hyperlink from the login page and rearranged the remaining links. All new provider registrations are handled thru the State's Licensing unit and will be entered in eXPRS by state staff as needed. (19656)
- Corrected a display issue with the site/service area on the view and update provider pages. (19582)

## **Prior Auth:**

- Added additional CPA end reason codes for SE 48 and SE 148 CPAs and retired a couple of codes (to allow a more specific end reason). If a user tries to edit a CPA with one of the retired codes, they will be prompted to choose a more specific code. (20245)
- Added the “Created By” and “Created Date” fields to the CPA and PPA pages. (20084)
- Updated the unit acronym from “DDPPU” (DD Provider Payment Unit) to “DDPTAU” (DD Provider Technical Assistance Unit) in CPA error messages. Users will see the old acronym on CPAs that were submitted prior to this release, and the new acronym on CPAs submitted after it. (19550)
- Implemented an edit that prevents updates or new CPAs after the close of a biennium. CPA updates, or new entries, will result in Pending CPAs which will be reviewed by CAU. (19340)
- Provided the ability to include or exclude voided PPAs from the PPA search page results. (19655)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Made some format changes on the SEPA page to align the months to the units, to correct a display issue with the Service Element number, and to right-align dollar amounts. (1110)
- Added the “Last Updated By” and “Last Updated Date” columns to the PPA search page results. (19662)

## **Reports:**

- Enhanced the report pop-up window and added a message when too much data has been requested in one report. The user is advised to limit their request by entering additional criteria or narrowing down their criteria. (20219)

## **System Services:**

- Revised the Organization and Provider pages. This affects the View, Create, and Update pages to follow eXPRS’ standard look and feel. (19743)
- Enhanced the session timeout window and message. After 19 minutes of idle time, the page will display a 60-second countdown before logging the user out. If the user clicks the OK box, they will be able to stop the time-out by taking an action within eXPRS (switching pages, conducting a search, etc.). (20218)
- Enhanced the notifications to allow sorting and paging within notifications (current and/or removed). (19660)

**4/6/2010 – v1.8.0.62**

## **Claims:**

- Added the ability to correct allotment claims thru the Mass Adjustment process. (19223)
- Unlocked the 07-09 encounters for settlement purposes for a state only role. Encounters from the prior biennium will remain locked for CDDP users. (19008)
- Fixed an issue when the suspended encounter reprocessing job hit against Mainframe tables that were unavailable. (18342)
- Implement system limitation when reprocessing claims. Federal rules stipulate that corrections to claims must be limited to 7 quarters plus the current quarter (previously identified as two years). The system will calculate the limit based on the first day of the claim and will not allow a claim to be reprocessed if any portion of it is outside the 7 quarters plus current limitation. (18450)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Added the ability for state users to override “Suspected Duplicate” claims for SE 54. Clients who receive employment services from two different providers are allowed to have overlapping CPAs, but the system denies the second claim as a suspected duplicate. (18680)
- The Rate Increase (RI) process was not displaying the new CPA’s total amount correctly if the rate change was a reduction in the rate. The rate was correct, and the amount was correct behind the scenes, but it didn’t display correctly. If the CPA was updated after the RI was completed, the amount would display correctly. (19306)

## **Enrollment:**

- Corrected an issue when adding a site or service area to a provider’s record. When a new site or service area was added, the contact information was not always included even though it was present on the main provider record. (19134)
- Implemented edits to ensure the certification/license dates are within the site’s or service area’s effective dates. This ensures that CPA creation and claims processing do not hit any unnecessary edits. (19287)
- Revised the provider service pages by reorganizing the layout, added the ability to hide or show expired sites, and added additional fields to the results lists. Users will be able to see the site’s effective dates, license/certification dates, and the capacity (when applicable); without having to open each record. (17927)
- Corrected a spacing issue on the view user page. If the Note field exceeded 2,000 characters, the Address lines would wrap. (18812)

## **Prior Auth:**

- Added “Last Updated By” and “Last Updated Date” to the find SEPA result page. The data reflected is for the most recent action only. (18012)
- Added additional end reason codes for case management (SE 48 and SE 148) CPAs. (18972)
- Created a process to submit multiple CPAs as a batch. Users with the ability to submit CPAs, can search for Draft CPAs, and use the results list to select one or many CPAs to submit. After submission, another results page will display showing the CPAs’ new status. CPAs that do not go into Accepted status have the reason appended to the Note field. (17748)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- A continuous SE 148 CPA was not allowed when the SE 48 CPA is split. This could occur when a client moved from one county to another, but remained in the same brokerage. Previously, the system required that the 148 CPA be ended to match the 48 CPA and a new 148 CPA had to be entered to match the new 48 CPA. The system should not require the 148 CPA to be split if both of the 48 CPAs assign the same brokerage. (18302)
- Created a SEPA Approval notification for Contractor IGA Manager role. (17540)
- Added Status drop down fields to the Find SEPA page. This allows the users to search for SEPAs by status. (18469)
- Corrected an issue that allowed overlapping CPAs if the end date was extended on a CPA. The system prevents overlapping CPAs when creating CPAs, but would allow the users to extend a CPA which then overlapped another CPA. (Note: the claims process would not allow services to be claimed for both CPAs for the overlap period.) (19222)
- Changed the sort order on the SEPA results page. It now sorts by SE and date. (18200)
- Corrected issues on the View Calculate PAL page. To recalculate a second rate or amount, the user would have to exit the page and return to get the new calculated amount. (18973)

## **Reports:**

- 90-Day Referral report was updated to include clients when their 148 CPA has not been created yet. (19307)
- Fixed an issue with the Client Liability report; it wasn't pulling by client unless the client prime was entered in all CAPS. (19224)
- Changed the CM Funding date criteria to a BI drop down instead of open date fields. (19280)
- Fixed some layout and display issues for the CM PFS and CM Fiscal report. (18893 & 19082)
- Created a State only report to track changes to Medicaid eligibility for CM enrollees. (18154)
- Added the remaining service elements to the Provider Expiration report. Previously it only returned data for the FFS providers. (18500)
- Corrected a display issue with the Outstanding Provider Liability report when pulling one BI's report after another. Prior to the fix, the user had to close out of eXPRS and log back in to open the next BI's report. (18835)

(The task numbers are in parentheses.)



# Release Notes for eXPRS

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- Enhanced the PLA sub report on the Payment Detail report. The sub-report has been reformatted and now includes the client name and prime for both the reversed claim and the offset claim. (19009)
- Corrected the subtotal and totals on the Remittance Advice. When an RA had more than one county or provider with provider liabilities, the final totals page only deducted the previous sections' PLA amount; not the entire reports' PLA amounts. (19210)
- Report descriptions were updated and moved to the top of the page (above the search criteria rather than below it). (19084)

## **System Services:**

- Added the "Action Log" data as a collapsible area on several pages in eXPRS (including the CPA and PPA pages). (18362)
- Added additional 'How To' documents under Claims and for enrolling and disenrolling users under Other.
- Updated the CPA problem solving matrices.

**1/14/2010 – v1.7.3.69**

## **Claims:**

- Corrected an issue that prevented users from viewing some claims. (18806 & 18911)
- Added "Submit" Encounter permission for Encounter Managers. This allows mass submission of suspended and draft encounters. (18806)
- Corrected an issue where the Service Coordinator or Personal Agent's name was not pre-selected based on the user's login. Now SCs/PAs will have their own name pre-selected on the enter encounter pages only if they have one organization to select from the login page. If the logged in person has multiple organizations for Encounter Manager role, they will have to select the correct entry in the list. If the SC/PA name does default to the user logged in, the user can change the SC/PA name if the defaulted name is not applicable. (18944)

## **Reports:**

- Fixed the totals on the CM/PA PFS report so it reflects the allotment payment amount found on page 1. (18918)
- Corrected a spacing issue on the Client Enrollment report. If the provider name was too long, it overlapped the rate column. (18807)

## **System Services:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Added categories, or sub-headings, to the Help Menu's "How To" document section. Within the categories, the documents are listed alphabetically. (18803)
- Corrected an application error for the New Provider notification. (18805)

**12/21/2009 – v1.7.3.39**

## Claims:

- Added the ability to submit encounters for one client for multiple dates. This is a new menu option under Encounter, "Enter Encounters for multiple dates". This allows an Encounter Manager to enter encounters for one client for several dates. The user must enter the client prime, the SE, the Service Coordinator/Personal Agent, and one or more dates using the new calendar. Once the "Find" button has been clicked, the search criteria is locked and cannot be changed unless the "Edit Criteria" button is clicked. *The ability to enter encounters for several clients for a single date has been renamed "Enter Encounters for single date".* (17478 & 18160)
- Added the client prime number to the CPA results list for the Enter Encounter pages. (18304)
- Updated the Submit Claims function. It previously only selected Draft claims for batch submission and now it selects Suspended and Draft claims. Also added the functionality to Submit Encounters where the status is Draft or Suspended for State users. The Submit Encounter functionality will be available for Encounter Managers after February's release. (Currently, it can be seen on the left-hand menu, but if an Encounter Manager tries to search for encounters, they will receive a message, "Your user account has not been granted access to the requested data: *user's name* does not have permission to Retrieve Claims"). (18131)
- Fixed an issue with the automatic reprocessing of claims when a CPA rate was updated during the daily SFMA run. Now if a CPA rate is changed and SFMA is running, the system will return a message advising the user that the save failed and to try updating the rate later (after 3:45 p.m.). (18539)
- Consolidated the View Claim page so all the information for the claim is displayed below the claim detail. Originally, the sections were viewed one by one after clicking a hyperlink to view the information

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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(like Exceptions). The new sections are collapsible/expandable and include the action log (all actions taken on the claim). (18164)

- Fixed an issue with the weekend's automatic reprocessing of Encounters where it tried to run when the mainframe tables were unavailable. Instead of suspending the encounters for other reasons, the original suspension reason will be retained. (18342)

## **Enrollment:**

- Added a process to auto-populate the provider service location's contact information when adding a site to a provider record. It will use the main provider record's contact information, and the data will be open for editing. (17622)
- Added the provider ID on the Payee Setup notification. (17438)

## **Prior Auth:**

- For Case Management (SE 48) CPAs, added a new column to the CPA search result list. Now the Brokerage Assigned will be displayed at the far right, when applicable. (17919)
- Created a notification to SE 148 CPA Managers when a SE 48 CPA is Accepted with their brokerage assigned. (17823)
- Corrected the return message when voiding a SE 48 or SE 148 CPA to say Encounter instead of Claim. (18002)

## **Reports:**

- Changed the search criteria for the Available Monthly Balance report so it only allows a full biennial date range. (18337)
- Corrected the calculation on the prorated CPA amount on the Cash Flow Report when partial months are used. (18338)
- Corrected an issue where an encounter would show multiple times if the client had more than one eligibility program code within the past three years. This made it look like the client had two encounters when it was really only one. The report now shows the client's program codes separated by a slash. A future release will change the report to return only the program code that applied to the specific encounter date. (18196)
- Created a suspended claim report. Users should monitor their suspended claims by using this report and take appropriate action to resolve issues as necessary. (18118)
- Modified the State's Participation report to include a grand total of unduplicated clients and grand total of encounters. (18295)

## **System Services:**

(The task numbers are in parentheses.)

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- Added export and sort capabilities to additional pages. (17857)
- Changed references to “WCM” (Waivered Case Management) to “PATCM” (Personal Agent Targeted Case Management). (17822)
- Standardized the labels on pages. This ensures the client prime is called the same thing on all pages (some pages may have used Client Prime while others may have shown Client Prime Num). (17745)

**6/19/2009 – v1.7.1.67**

## Claims:

- For case management, changed the allowed billing from monthly to daily, starting July 1st. Previously, only one encounter could be reported per client per month. The system now allows one encounter per day per client. (15997)
- Added a Notification when a claim or encounter that is being processed is interrupted and the claim ends up in a ‘submitted’ status. This will alert claim/encounter managers that they need to take further action. (16282)
- Added the Site/Service Area name to the View Claim and View Encounter pages. This is a search window which allows users to find a specific site by SE or by provider to find the claims or encounters by the site. (17074) (395)
- Changed the process for voiding a claim. Instead of returning to the home page after a claim was voided, the View Claim page will re-display with updated information on the claim. (16767)
- Modified the date and amount fields on the View Encounter page so the fields don’t look like they can be edited. (17117)
- Corrected the client liability account notification process after the CLA was updated. (17121 & 16829)
- Changed the case management allotment process for handling negative PPAs. (17127)
- Updated the View Claim page to accommodate additional fields. (16827)
- Modified the Enter Encounter result page to show the status of the Encounter and make the status a hyperlink to open/view each encounter. (16907)
- Added an edit that starts July 1<sup>st</sup> to review the provider’s license information before approving a claim. Sites that are expired or over

(The task numbers are in parentheses.)

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capacity will cause claims to suspend until the licensing is fixed or CPAs are corrected. (16947)

- Updated the View Encounter page to show the status of the encounter. (16828)
- Fixed the process so State users can UnSubmit Encounters stuck in a submitted status. (17075)

## **Enrollment:**

- Created a notification when a provider record is activated. This will notify the accounting unit who enters the provider record as a payee and as a vendor for payment. (16626)

## **Prior Auth:**

- Added organization name to the service coordinator/personal agent name in the dropdown field. This will help differentiate between SCs or PAs who are enrolled with multiple entities or have a common name. (16638)
- Implemented rules that will be effective July 1<sup>st</sup> to support movement between CDDPs and brokerages. (16077)
- Added a Brokerage Referral Date to SE 48 CPAs to be used on or after July 1<sup>st</sup>. This will enable tracking of the referral date to the client's brokerage enrollment date. Only State level users can update this field after it has been entered and saved on a CPA. The date entered must fall between the dates of the CPA. (16985)
- Added the ability to search for CPAs by site/service area. This will help trouble-shoot any CPA problems for exceeding the site's capacity. (17068)
- Removed the Amount and Balance fields on Case Management CPAs as they are not used. (16826)
- Modified the CPA submit process to handle a split in the Case Management CPA. This will ensure claims are not suspended or denied because the SE 48 CPA is split. (16980)

## **Reports:**

- Created a report to show CPAs with the brokerage referral date. Will also show the corresponding brokerage CPA if one has been created. (17072)
- Added SE 148 to the CM PFS report and renamed the report to CM/PA Provider Financial Statement. Roles determine which version of the report users have access to. (17014)

(The task numbers are in parentheses.)

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- Added the SEPA Approval Unit # to the SEPA Detail Report in all formats. (16946)
- Created a Brokerage Authorization report. (16982)
- Updated the pro-rate calculation on the Cash Flow Report. (17143)
- Add a brief description of each report to the search criteria screen. (15256)
- Created an Outstanding Provider Liability report. (16309)
- Updated the State's Participation Rate report to support SE 148. (17142)

## **System Services:**

- Created an option to copy a system role so one role can be modeled after another role. (16479)
- Added several new service elements for allotment payments to eXPRS. They include SEs 02, 55, 146, 147, 148, 150, 151, and 157. (16453)
- Changed the enrollment process so that only current organizations are included in the drop-down field when assigning an organization to a user. (16619)
- Added Created By and Created Date to the user enrollment screen. (16824)
- Set the cursor focus on several pages; i.e., the Find CPA page now has the cursor starting in the CPA Adj # field and the Find PPA page now has the cursor starting in the PPA Adj # field. (17070)

**4/2/2009 – v1.7.0.73**

## **Claims:**

- For case management, changed the label on the Service Coordinator drop down field to Srvc Coordinator/Personal Agent. (15808)
- Added the Service Coordinator drop down field to the Find Encounter search page. (15808)
- Added the ICN to the Provider Liability offset entries on View PLA. (15702)
- Added the Run ID as a searchable field on the Claim Search page. This allows users to search for all claims associated with a specific SFMA Run ID. (16110)
- Closed the date and amount fields on approved claims when viewing the claim. These fields should not allow editing. The note field

(The task numbers are in parentheses.)

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remains open so before an approved claim is voided, a note can be added. (16217)

- Added the ability to find suspended encounters on the View Encounter page. (15699)

## **Enrollment:**

- When searching for an Organization, if the organization was not found, an “Add this Organization” hyperlink was displayed whether or not the user had the rights to add an Organization and it seemed to allow the entry. However, after entering all the organization’s information and clicking Save, an error message was returned that the user didn’t have sufficient authority. The hyperlink is no longer displayed when the user does not have authority to add organizations. (15146)

## **Prior Auth:**

- Created a view-only version of the Create PAL page. Allows calculations to be performed without creating a new PAL. (15153)
- Created a new notification for the Contracts Administration Unit for when a PAL is Executed. (15205)
- Opened the Note field on ReBAR CPAs so additional information could be added. (16308)

## **Reports:**

- Standardized reports so that headers, field titles, etc., follow a standard format. Another change is that every other row should be shaded to differentiate between rows. (15449)
- Added BA Line amounts to the Available Monthly Balance Report and added this report to several user roles. (16122)
- Added the Paid Amount as a column on the Monthly RA. (16171)
- Added the Run ID as search criteria to the Payment Detail Report. (15701)
- Updated several reports to have an immediate refresh. Some reports were using cached data rather than retrieving the data again. It would hold the cached data for twenty minutes. Now it will retrieve the data from the database every time the report is pulled. (16006)
- Created a PAL Monthly Balance Report for state user roles. (15155)
- Added License Dates on the Provider Service Expiration Report which is available for state user roles. (16143)

## **Security:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Implemented an edit that prevents entry of a duplicate e-mail address on user profiles. Allowing multiple users to share an e-mail address may allow a potential security breach when the “Forget your password?” hyperlink is used to send a temporary password to the e-mail address on the user’s account. (15505)

## **System Services:**

- Updated eXPRS so that when you use your browser’s Print button (or File, Print) the logo, header information, left-hand menu, and footer sections are suppressed on the printed page. You can use Print Preview to see the page before it prints. (16092)
- Added the user’s organization and/or program area to their login name on the top of the screen. This is helpful when the user has multiple organizational roles that they must choose when logging in. If you only have one organizational role, you will see, “Logged in as (your name) - All my Organizations and Program Areas”. (15219)
- Updated pages to display the user’s name instead of the user ID where Last Updated By fields are shown. (15257)
- Enhanced the content of the e-mail when the “Forget your password?” hyperlink is used to generate a temporary password e-mail. The enhanced e-mail provides additional information and instruction for logging in with the temporary password. (16288)

**12/4/2008 – v1.6.3.22**

## **Claims:**

- Changed the Update Client Liability Account (CLA) process so that it automatically reprocesses any claim attached. (8369)
- Removed the Previous and Next buttons on several pages when there is no Previous or Next page to display. (15303)
- Corrected the date validation when searching for Encounters. Now if you enter an end date prior to the begin date, the system returns a date validation error instead of a ‘no encounters found’ message. (15340)
- Duplicate Encounters could be entered if the user clicked the browser’s Back button to return to the results list. A Previous button has been added to the Encounters Created page, which returns the user to the Enter Encounters search results list. (15621)
- Fixed the hyperlink on the Client Prime Number on the view claim page so it opens the Client Liability Account page. (15656)

(The task numbers are in parentheses.)



# Release Notes for eXPRS

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- Fixed the Prior Auth hyperlink for Case Management allotment claims so it opens the Provider Prior Authorization page. (15142)
- Removed the Notes field from the Create Claim result page. You cannot enter a note on this page so the field was unnecessary. (15143)

## **Enrollment:**

- Changed the button labels and page names when viewing a client. The Eligibility button now shows “Medicaid Elig” and the Waiver button now shows “Waiver/Svc Elig”. (14152)
- Updated client names. Two client names were corrected in the mainframe and still had to be updated in the eXPRS tables. (15274)

## **Prior Auth:**

- Created a copy BA line option. This gives staff the ability to copy a draft BA line and make applicable changes. (15151)
- Added the county and provider name to the error message when a user creates a CPA that overlaps another CPA. (15281)
- Added a Previous Button after the user approves a CPA. It returns the user to the Search results page. (14774)
- Added a confirmation on the Delete action for BA lines. (15465)
- Started logging user actions for BA lines and BA worksheets. (14777)
- Added a state level role so that ReBAR CPAs can only be created, edited, or voided by users who have the ReBAR CPA role. (15493)
- Corrected an error when updating the Rate on a CPA, which was causing a JSP Application error. (15657)

## **Reports:**

- Modified the Budget Allocation Review report so it opens in Excel format. (15354)
- Corrected the Client Enrollment report where it was showing clients more than once when there were multiple CPAs. (15280)
- Fixed the Prior Auth Balance Report where it showed an incorrect balance for Optional PPAs. (15253)
- Created a state report showing upcoming expiring licenses or certifications for Providers and Sites. (14934)
- Fixed the Remittance Advice search results. It showed totals for Encounters when they should be excluded. (13399)
- Also fixed the Remittance Advice report where it was showing encounter PLAs on the summary page, which should be excluded. (15424)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Created a state report for SE 48 CM Funding. (13041)

## **Security:**

- Added “Last Logged In” date to the View User screen. (15108)

## **System Services:**

- Modified the Notifications list to show Created By. This is the name of the user who did the action that generated the notification. (15148)
- Added the ability to select multiple notifications when removing them. Note: When a user removes a notification, it is removed from all users’ notification list. (15147)
- Removed the extra page when opening the Release Notes. (15450)
- Added a message to login page. The message includes the phone number for DHS’ Service Desk as well as a hyperlink to their e-mail address. Using the hyperlink should open a new e-mail. (14929)
- Corrected the paging error when viewing users. The system was only allowing you to get to the second page even when there were additional users to view. (15299)
- Changed the sort order on SEs (under Manage Roles) so that it now sorts in Numeric order. (14787)

**10/16/2008 – v1.6.2.42**

## **Prior Auth:**

- Added the ability to Copy an existing CPA. The system will make an exact copy of the CPA and put it in Draft status so the user can then update it as applicable (i.e., change the site).

**9/18/2008 – v1.6.2.38**

## **Claims:**

- Added Status as a search option for Find Client Liability. You must use at least one other criteria along with the status, i.e., begin date, client prime number, provider ID, or DHS Contract number. Note: the more criteria you enter, the faster the response! (14117)
- Search for Encounters ‘Created by’ doesn’t work for non-state roles. Removed the field and binoculars from the screen for non-state users. (14927)
- Modified the Funding Rule page to allow easier navigation. (14649)

## **Enrollment:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Removed the ability to update a client's mainframe record through eXPRS. Requests to change a client's name, DOB, etc., need to be sent to the local DSO.

## **Prior Auth:**

- Added the contract number to the PAL Notification description. (11384)
- Added a warning message when ending SE 48 CPAs. The update is allowed, but the user is warned that non-SE 48 CPAs exist for the client. (13693)
- Added a Reason Code drop down field when terminating a SE 48 CPA. This list is populated with predefined reasons and is required when ending a SE 48 CPA. (13078)
- CPAs that Pend will have the pend reason added to the Note field. If a CPA Pends for more than one reason, or more than one time, the notes will reflect that. The note itself contains the date and the name of the person who made the last change. (13535)
- Modified the logic for checking CPAs to prevent overlapping CPAs. (13835)
- Changed the verbiage on Find CPA return message when the client prime is not found. (14347)
- Added a Rate column to the Find PPA search result list. Optional PPAs and CM PPAs will display \$0.00 as the rate as that field isn't used for these PPAs. (14531)
- Modified the Case Management notifications for state roles. (14651)
- Updated the verbiage for one of the CPA date edits. The message returned was misleading and referenced the provider's dates rather than the contractor's valid dates. (14376)
- Fixed the Reset button on the Find PPA page. (15144)

## **Reports:**

- Created a Case Management Available Monthly Balance Report. (14635)
- Added a client count to the Available Monthly Balance Report. (13712)
- Added an Excel only version of the Available Monthly Balance Report. (14213)
- The Available Monthly Balance Report now allows the user to select "All" under the Service Element drop down. (14922)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Corrected how the allotment is displayed/calculated on the CM Fiscal Report, the CM Participation Rate Report, and the CM PFS Report. (14636, 14633, 14632)

## **System:**

- For consistency, the SE text box was replaced with a drop-down box where applicable. (14183)
- Changed the left-hand menu so that it has been organized by topic and ‘flies out’ when the user hovers over it. Some headings have sub-menus and sub-headings. Reports are listed under the Report heading as well as a sub-heading under the applicable heading. For example, the Remittance Advice is in two places; under Claims, Reports and under Reports. (15145)
- Updated the calendar feature with a newer Date/Time picker. To close the calendar without choosing a date, click the X that replaced the calendar icon. (14954)
- Consolidated the release notes into one document, Release Notes, rather than having the Enhancement tasks separated from the Bug Fix tasks. (15115)
- Corrected a system problem when assigning MH roles to users. Will now be able to update users who have MH and/or MH & DD roles. (15044)
- Updated the security to allow users with both claims and encounter roles to have access to SE 48 permissions as applicable. (15114)

## **6/30/2008 – v1.6.1.76**

Added a new Service Element, Case Management, SE48 to eXPRS. For information, please refer to previous transmittals. To report issues, please contact the DHS Service Desk at 503-945-5623.

## **Claims:**

- Added additional edits for the client’s service eligibility when submitting claims. (13694 & 10552)
- Added an edit to the State-only Mass Adjustment process that prevents the selection of claims that are older than two years, and fixed the date criteria on the search screen. (13080 & 12843)

## **Enrollment:**

- Removed the Create Client hyperlink from the left-hand menu as this function is no longer available in eXPRS. (11270)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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## **Prior Auth:**

- Added an edit that requires a client have a Case Management CPA in place before any other CPA can be accepted. (13538)
- Changed the Create PAL search screen so that the user can either key the contract number in the Contractor field or use the binoculars to conduct a search. Previously the user **had** to use the binoculars to search for a contract. (10862)

## **Reports:**

Reports are now sorted alphabetically to make it easier to find a specific report as well as being listed under the appropriate heading in the newly reorganized left-hand menu.

- Created a Case Management Enrollment report. For those who have access to it, the report is called CM Enrollment. (13038)
- Created a list report of the Budget Allocation Lines for the Contract Administration Unit. (11387)
- Created an Available Monthly Balance report. (11080)
- Filtered out SE 48 from existing reports where Case Management was not applicable. (13779)
- Streamlined the feature to Print the Budget Allocation Lines using the blue “print” hyperlink. (11127)
- Made some changes to the Security report for the DHS Security Administrator. Expired roles are now included with an expiration date indicated. (12060 & 13498)
- Made some minor changes to the Personal Care 20-hour (PC20) report. This report shows upcoming eligibility reviews that are due. (10782)

## **Security:**

- Added a new role to allow specific State staff to use the rate increase screen. (11269)

## **System Services:**

- Moved the Cancel button on the View Contract page; it wasn't displaying the whole button. (13400)

**12/20/2007 – v1.5.3.13**

## **Claims:**

- Added a notification to Client Liability Update so that when a change is made to a client's liability, a notification will display on the Home

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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page for CPA Managers, CPA Coordinators, and CPA Preparers.  
(7745)

## **Prior Auth:**

- Added a print page feature to the Budget Allocation Lines and Worksheets. (610)
- Changed a couple of pages in the application so that the Enter key will activate the Find/Next button and not give an application error. (5988)
- Added the effective dates of each site and service area so that when a CPA is created, the user can select the correct site based on the date range. Also corrected an edit so that when ending a CPA, the site/service area's effective dates aren't validated. (9604)

## **Reports:**

- Added a monthly Remittance Advice Report. This gives the ability to print all runs in a month in one report. This is an Excel version of the RA listing all claims for the month requested. (1265)
- Added an Available Monthly Balance Report. This report selects Approved SEPAs and compares them with Approved CPAs, by contract, SE, and date range. (8401)
- Changed the Contract field on all reports from a drop-down field to a keyable field (with Binoculars for looking up the contract number). (7744)
- Corrected the column heading on the Remittance Advice report so it shows "Paid" instead of "Pai d". (9328)
- Corrected an error where the PLA link on the Payment Detail report appeared but didn't display the detail information. (9948)

**9/27/2007 – v1.5.2.12**

## **Claims:**

- We added an estimated process time to the claim submission process. The message gives a total number of claims to be processed, the estimated length of time to process the claims, and the time the process started. The start time is shown using standard military time (i.e., 1:00 p.m. is displayed as 13:00). (4917)
- The Client Liability results used to show all clients for the provider regardless of whether or not the client had a current CPA with the provider. Edits were put in place to only show clients who had CPAs with the provider during the time period entered. (6099)

## **Prior Auth:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- We changed the Client Prior Authorization process so that when a newly created CPA goes to pending, it will return to the CPA detail screen so the user can see the status. (5984)
- We added totals to the CPA search result list. It now gives the number of CPAs, and totals for the rates and the amounts. (7741)
- We modified the Create BA Worksheet screen. Previously, if you knew the prime number and keyed it in rather than used the binoculars to search for the client, the client name would not display until the BA line was saved. Now, after the prime is entered, the user can click the notepad button to display the client name and date of birth. (5991)
- We added the BA Worksheet ID to the first page when creating a Service Element Prior Authorization. (8295)
- We removed the ability to update a voided Program Area Limitation. (6435)
- We corrected an issue where a Service Element Prior Authorization Adjustment could be voided and a Budget Allocation Line would remain Assigned under the voided SEPA Adjustment. The BA Line is now returned to Ready status. (7970)
- There was an issue with creating Client Prior Authorizations in the past if the site was no longer active (the drop-down list excluded inactive sites). We added an edit to allow the use of all sites when creating a CPA, but when the dates are entered, if the site was not active during the whole period, an error message is now returned. (1113)
- We fixed an issue where a draft CPA couldn't be created when the contract was in proposed status. (7467)
- We corrected a bug where the provider's address wasn't displaying on the CPA. The address would show while the CPA was being created, but after it was saved, the address area would be blanked out. (7575)
- We fixed the Reset button on the CPA Screen so that it resets the fields to nulls. (7623)

## **Reports:**

- A Payment Detail report was moved into production. This report has summary pages and sub-reports of the Provider Liability Accounts, and the claim details. The search criteria fields are the begin date, the end date, the contract number, and the provider number. (1392 & 1395)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- The SFMA Run ID Number has been added as a search criterion to find a specific Remittance Advice. Other search criteria (such as contract or provider number) can also be entered with the Run ID. (5986)
- The Remittance Advice has a new streamlined Excel format which allows easier use of calculations and data manipulation. (4918)
- We added the Corrected Claim ICN to the RA report. It now shows the ICN and the Replaces ICN for claims that have been corrected or “replaced”. (7743)
- A Participation Rate report was created for DHS Data Analysts. (5851)
- The Client Liability Report now has a hyperlink to the Client Liability Account search screen. It also allows you to use the Back button to return to the report. (5993)
- The Client Liability Report now includes the CLA period for each record. (7742)
- We redesigned the Prior Auth Balance Report and how the Optional PPAs are displayed. (7018)
- The Designated Client report search criteria previously used the Contract ID (internal contract number) rather than the DHS Contract Number to search. (5989)
- The Provider Payment Summary Report also used to use the DHS Contract ID rather than the DHS Contract Number for searches. (5990)

## **System Services:**

- Modifications were made to the system so that the user doesn't have to key in a four-digit year. The only area that wasn't modified is the Date of Birth fields; the user will still need to enter the year of birth as CCYY or YYYY. All other date fields can be entered as follows: M/D/Y, or MM/DD/YY, or MM/DD/CCYY. (620)
- On the Welcome to eXPRS page, the hyperlink for the Release Notes now displays a last updated date. This will indicate new versions of the Release Notes whether a new release was deployed or not. (3760)
- We added binoculars to search for client prime, contract number, and provider number on several screens. (6924)
- We applied consistent labels to several fields; the client prime number, Last Updated Date and Last Updated By, Creation Date and Created By, and DHS Contract Number. (1848, 6892)

(The task numbers are in parentheses.)



# Release Notes for eXPRS

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- We corrected a problem with the routing of e-mail notifications for the “Forget Password” feature. (8177)
- For consistency, we moved the red asterisk, which indicates a required field, to the left side of all fields. (536)
- We updated screens where the navigation titles for View and Edit were not consistently displayed. (563)
- We changed the display format of all client names to be last name comma first name, unless the name was broken out into two fields. (1345, 2062)

**6/7/2007 – v1.5.1.10**

## **Claims:**

- Modifications were made to the system to allow direct provider payments. (5756)
- Service Elements 142 & 143 were added to eXPRS. (5901)
- Changes were made to accommodate the biennial rollover. (3633)
- We implemented a nightly job that will Void all suspended duplicate claims that are more than 60 days old. Currently, suspended duplicate claims are automatically reprocessed daily to try and approve those claims. (1919)
- We updated two of the field names on the View Client Liability screen. Total Earnings was changed to "Prev Month's Gross Earnings" and Need Resource was changed to "Need Resource (including current month's unearned income)". (4383)
- On the claim search results list, we added subtotal lines for each status type. (3872)

## **Enrollment:**

- We opened up an edit to allow the same Tax Identification Number for multiple providers. (6231)

## **Prior Auth:**

- We added the SEPA Unit ID as a searchable field for the SEPA search. We also added binoculars to search for the client ID and the contract number, and we made the Service Element a drop down field. (5992 & 6014)
- We added the Site to the CPA search results list. (4920)
- We added the Budget Allocation (BA) Line ID and Worksheet ID to several pages in the BA area. (5995 & 5996)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- We added Last updated by name, Last updated date, Created by name, and Created date to the Budget Allocation Worksheet. (5994)
- We corrected a problem where the Optional PPA would revert to a 7/1/2005 start date regardless of the date entered upon creation. This caused problems with new providers. The system will now default the start date to the Contract Start Date or Provider Valid Date whichever is later. (3621)

## **Reports:**

- We added a SEPA Detail Report. (1889)
- We corrected the HTML error for reports. (6454)

## **System Services:**

- We fixed an issue where the first person who logged in to eXPRS each day got an application error and had to back out and log in again. (1270)

**4/5/2007 – v1.5.0.22**

## **Claims:**

- We added the ability to search Provider Liability Accounts by the SFMA Run ID. (2486)
- We changed the 'Replaced Claim' field so it now displays the claim's ICN instead of the Claim ID number. (2515)
- We added the Run ID and Run Date to the claim search list. (3884)
- We corrected the concurrent processing problems. We will manually correct the claims that did not have a PLA created after reviewing the claims with the providers. (3251, 3552, 3847, & 4984)
- We fixed the issue where the system was changing the billed amount after the claim was approved and paid. As part of the fix, you will no longer have the option to enter a different billed amount than what the system calculates. The system will correct the billed amount and the Remittance Advices will reflect the correct amount. (3251, 3552, 3847, & 4984)
- We fixed the search by Client ID on several screens so it is no longer case sensitive. (3370)

## **Enrollment:**

- We aligned the headings with the list on the client Eligibility page. (3940)

## **Prior Auth:**

- We right justified the dollar amounts on several screens. (559)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- We set a sort order for the Find CPA results. It sorts by Contract number, Service Element, Provider number, Client last name, first name, and Effective Date (1459)
- We added additional search criteria on the SEPA search page. (2018)
- The complete status now displays instead of only part of it. Previously, it showed Pending instead of Pending Acceptance or Pending Approval. (2019)
- We added the last updated user name and last updated date to the View CPA page. (3233)
- We removed the filter that only allowed Draft BA lines to show in the search results. (3608 & 3761)
- We added edits to prevent the addition or acceptance of overlapping CPAs. (3253 & 3254)
- We corrected an issue where not all of the CPA notifications were showing up. (3594)
- We removed the filter that only allowed Draft BA lines to show on search results. (3608 & 3761)

## **Reports:**

- We modified the View Claims page with two new options. The user can choose to display the notes field and/or the Run ID and Run Date in the Find Claims results. Notes are usually entered when a claim is voided, but may be used on other claims. The “Show Notes?” field defaults to No and the “Show Run ID/Date?” field defaults to Yes. (2066)
- We created a Client Liability Report. This report is similar to the Provider Financial Statement (PFS) report previously used. (3384)
- We corrected the Cash Flow report. There were some instances where negative balances were displayed and the number of claims was not correct. (4713)

**12/19/2006 – v1.4.1.9**

## **Claims:**

- Added Contract and Service Element as search criteria to Find Client Liability screen. (1963)
- Added a note field to Client Liability Account. (2061)
- Created a Find Client Liability Offset screen. (2058)
- Added Claim payment amount to Claim search result. (2964)
- Added Create user name and date to the View Claim Page. (2399)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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## **Prior Auth:**

- Added Prior Auth Approval Status to the Provider Prior Authorization Search Screen. As a searchable field and as column to display in the search results. (1922)
- Added Monthly Rate and Grand Total to the Client Prior Authorization Search results. (2054)
- Added a view-only BA lines screen for Counties. (2067)

## **Reports:**

- Added a difference between Authorized and Paid Amount column to the Cash Flow Report. (2055)

**11/2/2006 – v1.4.0.17**

## **Claims:**

- Added Batch Submit for Draft Claims. (2056)
- Added Hyperlink from Client Liability Account to Client Prior Authorization. (2060)
- Added Hyperlink from Claim with Client Liability Account offset to Client Liability Account. (2059)
- Add Find Client Liability Account by Provider Number. (2057)
- Made reversed claim ICN on provider liability view/edit a hyperlink. (2020)
- Added links between replaced claims and corrected claims facilitating easier reconciliation of corrected claims. (2014)
- Added Search Claims by Client Prior Authorization number. (2072)
- Added Search Claims by Submit Date. (2065)
- Added Provider Prior Authorization Withdrawn Notification to Local Authority. (2076)
- Cannot add note when voiding a claim. (2232)
- Can't void Approved CPA with no claims. (2230)
- Claim Edit rule for Late Claim submission incorrect. (2235)
- Mass claims adjustment fails. (2234)
- Missed cash advance recovery for Grant County. (2402)
- Remittance Advice excludes claims with zero payment amount. (2319)
- SFMA interface saves new row in draft status even if run cannot start. (2231)

## **Prior Auth:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Added current balance on Client Prior Authorization view and edit page. (2075)
- Enhanced SEPA Summary Page. (1241)
- All CPA's found for Find CPA have the CPA amount for the Balance (1936)
- Cannot delete CPA created with July COLA procedure. (2038)
- Service Rate limit not checked during CPA update. (2305)
- Unable to void CPA due to security restriction on void claims. (2277)
- Withdraw allowed on CPA with Approved claims. (2306)

## **Reports:**

- Security limits which report(s) the user can see in the left-side menu. (2032)

**8/10/2006 – v1-3-2**

## **Claims:**

- Add Contract ID to Provider Liability Account to support biennium. (2012)
- Display Client Name on PLA Adjustment. (2052)
- Display original PLA amount on PLA search results. (2022)
- Add claim ICN to find PLA screen. (2042)
- Client liability deduction amount is displayed incorrectly for denied claims. (2069)
- PLA search page throws an error if when pressing Enter instead of clicking Find. (1968)
- PLA edit page throws an error when attempting to create adjustment. (2035)
- PLA edit page throws an error when attempting to update effective date. (2036)

## **Prior Auth:**

- Add Mass BA Line Update Process. (1847)
- Add Provider Number and PPA Amount to all PPA notifications. (1958)
- PPA Rejected Notification Sent to wrong Party. (1957)

## **General:**

- Display row count on search pages. (2025)
- Display column totals on pages that display lists of numbers. (2046)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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**4/28/2006 – v1.2.2.34**

## **Claims:**

- During create claims the effective date search criteria was only using start date it now uses logic that will show any CPA open during the period entered in the criteria page. (1934)
- Claim could be submitted more than once while waiting to be processed. (1941)
- The SFMA process was too slow. (1925)

## **Prior Auth:**

- The procedures for applying the Wage Increase for August 1, 2005 thru March 31, 2006 were added to the application in preparation for running them in May. (1326, and 1884)
- A user with the correct privileges can update the rate on Approved CPAs. When the rate is updated and saved, all of the Approved claims are reprocessed with new amounts and Draft claims are deleted. (1884)
- A CPA end date could not be set to the same date as the last claim end date. [ex. Last claim 12/1/2005 – 12/31/2005, then the end date could not be set to 12/31/2005, but could be set to 1/1/2006.] (1865)
- During Find CPA the effective date search criteria was only using start date it now uses logic that will show any CPA open during the period entered in the criteria page. (1933)

## **Reports:**

- The Remittance Advice report selection now provides a list of Run IDs that meet the criteria entered in the selection form. The user then can see some information about those RunIDs (Amount Paid, Liability Withheld, and Total of Approved Claims) before selecting the report to view.
- Provider number could not be entered in the criteria pages for the Cash Flow, Client Enrollment, and Prior Auth Balance reports. (1491)

## **Security:**

- Change Delete button on Edit User Account screen to "Deactivate Account" (1452)
- Errors when logging into eXPRS when the password has a problem. [expired, wrong password, etc.] (1937)

**3/23/2006 – v1.2.1.18**

## **Claims:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- The Client Liability Account (CLA) search screen does not return any records with date range only criteria. (1918)
- SFMA Batch failed due to incorrect formatting of the file. (1923)
- CLA update failed due to claims not being reprocessed. (1924)
- Claim process sent unneeded emails to Tech. Support. (1920)
- SFMA interface fails because it takes too long to finish. (1914)
- Claim process error caused claim to be left in “Submitted” status. (1921)

## **Prior Auth:**

- The procedures for applying the Wage Increase and the COLA for April 2006 were added to the application in preparation for running them on 3/25/2006. (1834, and 1835)

**3/8/2006 – v1.2.0.20**

## **Claims:**

- Claims search screen returns are now sorted by Provider ID, Client Last Name, First Name then Start Date. (1461)
- Client Liability Account screen now contains client Prime Number. (1850)
- Duplicate Claims that are submitted at the same time are both approved. (1895)
- CLA Interface Creates CLAs for Denied Cases. (1842)
- The claims Mass Adjustment process sometimes fails when a large number of claims are reprocessed. (1881)
- eXPRS SFMA data was updated to match what is in SFMA. Manual corrections that were done in SFMA are now reflected in the eXPRS database. (1901)

## **Enrollment:**

- Provider Number is returned in its own column on the Find Provider screen. (1364)
- View Organization returns indication of the type(s) of organization (Payee, Provider, Contractor, and Local Authority) (1840).
- When updating Provider user can enter a duplicate Tax ID number (1823)

## **Prior Auth:**

- Contract Signatory has been added to the Contract Screens. (Create, Update, and View) (1454)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Complete Audit log is recorded to the database on all Prior Authorizations. (1829)
- The CPA amount does not update on save after updating a CPA date or rate. The calculator does not change the CPA amount. (1866)

## **Reports:**

- A Provider Payment Summary Report has been added that shows the total of Claims Approved, Provider Liability Withheld, and Amount Paid in each SFMA Run for a particular provider. (701)
- Drill-down links in the Prior Authorization Balance Report are now indicated by blue text. (1837)
- The RA Report Provider Search Screen does not return to the Criteria Page after selecting the desired provider. (1880)

## **Security:**

- Security Roles now have expiration dates. Expired roles cannot be added to user accounts. (1439)
- Effective dates of the roles assigned to a user are now displayed on the User Account screens. Roles are sorted by Active/Inactive status, then by Role Name. (1441)
- Roles are sorted by Active/Inactive status, then Role Name on the View Roles screen. (1440)
- User Account screens now have a Primary Organization field which is limited to a drop-down list of organizations within eXPRS. (1443)
- Roles assigned to user accounts now have date and time for the effective period. (ex. 8/1/2005 12:00PM thru 2/28/2006 5:00PM) (1449)
- There is now a Local User Account Security Report that contains all of the eXPRS users that have at least one role in the Local User Account Security Administrator's organization.
- When the user changes their password the new password field is just labeled "Password". It is now labeled "New Password". (1365)
- For any field on the Find User screen entering a value with an apostrophe will cause an application error. (1490)
- Failing to put the time in the Effective and/or End Date fields results in an error. (1890)

**1/9/2006 – v1.1.1.10**

## **Claims:**

(The task numbers are in parentheses.)



# Release Notes for eXPRS

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- An application error occurs when submitting claims with multiple funding types (Medicaid and Non-Medicaid, etc.). (1379)

## Prior Authorization:

- Cash Advance claims were included when checking the available balance for CPAs. This caused an insufficient balance error. (1817)
- Under certain conditions a SEPA would be created with totals that were \$0.01 less than the sum of the Budget Allocations that created them. (1826)

## Reports:

- The Prior Authorization Report now contains Client Prime and Name when “drilled” down. (1836)
- The Prior Authorization Balance Report did not return any information if the Balance Date was equal to the end of the Contract. (1846)

## System Services:

- An application error search and view function was added for Service Desk and System Administration users. (1854)

**11/22/2005**

## Claims:

- The view of funding of claims is now a Security Permission. If the user does not have the permission, then they cannot see the link on the View Claim screen. (540)
- When searching for a claim, the search page now includes the client name in the return. (1303)
- When the user updates the CLA Amount, they can now save the earnings and unearned income amounts used to calculate the new CLA amount in the Update CLA screen. (1359)
- There is an "All" checkbox on the create claims screen that selects all of the CPAs. (623)
- Document numbers are now included in SFMA interface results email. (1200)
- CLA Search screen now returns information sorted by Last Name, Start Date, and then End Date. (1338)
- The user can now create a new Funding Rule by copying an existing rule. (1005)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- The user is now notified during the create claim process when the start or end date for the claim has been adjusted to become the date of the CPA. (1111)
- Client Prime number is now displayed on the View/Edit Claim screen. (1198)
- SFMA runs now have an RA status to suppress RAs for SFMA Runs that were not processed. (1325)
- Users with the correct security rights can now view the SFMA Interface history. (1234)
- A claim exception that has been overridden shows a checked box next to the exception after the claim has been approved. There is no way to override an exception on an approved claim. Box should be removed from approved claims. (892)
- When error occurs: “Your request could not be completed because: SFMA interface run failed: null - The following parties are not setup as Payees: 54760 54856 “. Payee’s names should be shown instead of IDs. (995)
- A claim can be submitted for a provider who has been terminated or otherwise inactive. (1041)
- ICN numbers for claims are appearing with either 12 or 13 digits. They are all supposed to contain 16 digits. (1196)
- The log messages for the daily CLA update process appear to be coming from the monthly create process. (1271)
- Funding Rule save causes application error when waiver code longer than 3 letters. (1289)
- CLA Search screen returns preferred instead of legal name. (1305)
- When creating a claim from a CPA with an amount that has greater than two decimal places, the billed amount is changed from the original CPA amount. (1342)
- When updating a CLA if the user enters "000.00" in the Corrected Amount” box, an application error occurs. (1349)
- It is possible to submit the same batch to SFMA more than once if a user presses the browser back or refresh button after submitting the batch originally. (1370)
- CLA cannot be added. (1376)
- SFMA interface failed to complete when Provider Liability amounts are deducted across a large number of paid claims. (1468)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Save button on the claim exception page shows even if current user does not have the update claim exception system privilege.

## **Enrollment:**

- Maintenance users can now launch the Client Eligibility (Recipient) Interface manually. (1195)
- Required fields are not being checked on Client Edit form. (587)
- An error occurs when a CPA is created for a client that doesn't have a designated prime number. (1269)

## **Prior Auth:**

- The "Next" button on the Create CPA screen now appears next to each step instead of only at the bottom. (617)
- On Create CPA screen, hitting Enter causes Application Error. (1222)
- The calculator button on the Prior Authorization screens (PPA and CPA) calculates the amount incorrectly due to rounding error. (1297)
- Provider level security role can not search using the DHS contract number. (1319)
- When a CPA end date is changed to a date prior to last claim, the message returned is "Insufficient funds" when it should be "Claim(s) has been approved for this CPA after the end date." (1328)
- CPA end date can be changed to before approved claim end date. (1473)
- CPA search screen returns Contract ID instead of DHS Contract Number. (1178)

## **Reports:**

- Users can now type the provider number into the Remittance Advice provider selection instead of using the Binocular lookup. (1351)
- The SFMA Detail Report now contains Document Numbers. (1350)
- Cash Flow Report uses days for prorating instead of months. (1324)
- Clients have CPAs that start at 8/1/2005 and go for a year or more - but they don't show up on a Client Enrollment Report that starts 8/2/2005. (1367)

## **Security:**

- Password box has been removed from the Edit My Account screen, since the user cannot change the password there. (1444)
- Users with the Help Desk Role can now view Role details. (1164)
- Application error when changed Login Name is a duplicate. (1330)

## **System Services:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Application errors are now captured in the database instead of log files. This allows for better diagnostics and increased performance. (1343)
- Change Notifications for CPA sent to wrong role. (1451)
- SEPA Notifications not sent to users. (1456)

**10/7/2005**

## **Claims:**

- Suspected Duplicate check allows certain duplicate claims to be approved. (1382)
- Application error when submitting claim. Related to claim funding percent being null or negative. (1361)
- Application error when submitting a large batch of claims. (1382)

## **Enrollment:**

- Title XIX eligibility nightly interface fails. (1380)
- Table heading on View sites/services are incorrect. (1334)

## **Prior Auth:**

- Added ability to delete draft BA Worksheet. (1369)

## **Reports:**

- Provider Adjustments not displayed on the RA. (1373)
- Denied claims not shown on RA (1368)
- RA does not filter Provider Adjustment by Provider. (1344)
- RA Provider Cover sheet shows wrong amount. (1344)

**9/28/2005**

## **Claims:**

- Claim exception/funding tab pages now display common claim info. (934)
- SFMA interface stores document number with transactions. (1119)
- Create a Mass claims adjustment audit history. (807)
- Save claim line segments. (808)
- Mass claims adjustment search criteria now contains funding rule id. (890)
- Mass claims adjustment now allows more than 60 claims to be processed. (1254)
- Provider Liability recovery causes SFMA balanced transactions to fail (1346)
- Javascript error on Mass Claims Adjustment form (1332)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Provider Liability recovery causes rounding error (1333)
- System allows conflicting Funding Rules (1132)
- CLA Interface schedule conflicts with Mainframe database update (1181)
- Unfriendly error message when trying to delete Funding Account that has been used. (191)
- Funding rule search does not require date range (1066)
- Find claims by contract number is case-sensitive (1149)
- Find CPA in Create Claims process returns Client ID instead of Client Name (1221)
- View claims returns Contract ID instead of DHS Contract Number (1224)
- Voided claims appear in Mass Claims Adjustment (1244)
- Claim was Approved when should have been denied if rule violated has incorrect disposition in database (967)
- CLA is not reduced by suspended claims (1191)

## **Enrollment:**

- Client Eligibility Button appears when user does not have rights to view eligibility. (969)
- Adding MH30 service to provider prevents other program areas from being selected (1057)

## **Prior Auth:**

- Search for BA Worksheets by Contract Number. (596)
- Check box on BA line Item uses previous contract number. (605)
- BA Line Item form starts tab order at file name instead of Contract Number (628)
- Cancel button on Accept PPA returns to notification page instead of PPA list (1059)
- Return button missing View CPA when selected from View Claim (1053)
- Provider list in Create CPA not sorted when it should be in order by provider number (1336)
- Delete button missing from Draft CPA (1286)
- CPA can be voided with approved claims (1316)
- Draft Status BA gets duplicated when browser back button is used (896)

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- When upload error occurs in BA Line Item, the message remains (979)
- “No SEPA’s” [*sic*] error message has wrong grammar. (1021)

## **Reports:**

- New client enrollment report. (272)
- New All Security Administrators Report. (856)
- New All Roles and Permissions Report. (857)
- New All Permissions and Roles Report. (858)
- New Daily Security Report. (855)
- New Monthly Security Report. (855)
- Cash flow report selection criteria does not check that start date is less than end date (988)
- Cash flow report selection criteria does not check that start date and end date are within reasonable range (994)
- Begin Date in Prior Auth report is less than 01/01/0100 yields incorrect error message (993)
- Prior Auth Balance report selection for service element does not contain the SE# (1030)
- Remittance Advice Report displays report dates backwards (1148)
- Daily Security Report does not filter by dates range correctly (1171)
- Remittance Advice Report date incorrect - 12/31/9999 (1252)
- Prior Auth Balance Report uses data from wrong database (1312)

## **Security:**

- Drop down list on Edit User Role shows all Users. (1034)
- Delete button appears on My Account screen (1080)
- Password change not forced after changed by admin (1165)
- No way to reinstate account locked by inactivity (1250)
- No way to find deactivated accounts (920)
- Edit User Role accepts invalid end date (1096)
- Add/Edit role allows end dates earlier than start dates (1107)
- Unprivileged user can view account data for any other user (1108)
- Expired user roles show on View Role screen (1116)
- Edit User Role allows creation of duplicate roles (1117)
- If you add a role with a future date it allows that access immediately (1134)
- User account should require zip code but does not (940)

## **System Services:**

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Screens for application job scheduling. (1142)
- Javascript error on password reset page (1320)
- Confidentiality Agreement page says null at top left (1163)

**9/12/2005**

## **Claims:**

- CLA interface creating negative CLA balance.
- Accounting transactions (415/416) contain negative amounts.

## **Prior Auth:**

- Rounding error in prior authorization balance checking prevents full utilization of higher level PA.

## **Reports:**

- CPA amount in Cash flow report is incorrect.

**8/31/2005**

## **Claims:**

- Application error occurred when claim paid amount was zero.
- Rounding error in CLA deduction.
- Funding only stored 4 decimal places when it should be 8.
- Schedule of CLA interface conflicted with database backup.
- Incorrect prorating of CLA amounts across multiple months.
- Rounding error in claims funding.
- Rounding error in PLA prorating.

## **Enrollment:**

- View waiver screen causes “500 HTML Error”

## **Prior Auth:**

- Rounding error in PPA Amount calculator.
- Withdrawal of a SEPA and PPA prevented due to balance checking.

## **Security:**

- Password reset even if answer incorrect to user question.
- Forgot password fails to reset password if security rules are changed to require passwords with numbers and characters.

**8/25/2005**

## **Claims:**

- SFMA interface fails due to unbalanced adjustment transactions (415/416)
- The Remittance Advice was not created during SFMA interface.

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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## **Prior Auth:**

- Optional PPA could not be accepted after the Cash Advance claims were created.

**8/22/2005**

## **Claims:**

- The CLA amounts were created with incorrect amounts. CLA data was replaced and now uses the correct data to create the accounts.
- The CLA daily update no longer causes error.

## **Reports:**

- The Remittance Advice timed out upon viewing.

**8/17/2005**

## **Enrollment:**

- Updating clients' names would cause the same CPA to appear multiple times, once per name
- View Client Waiver no longer causes application exception

## **Prior Auth:**

- Budget Allocations can now have designated clients removed from them
- The NTE rates for SE 51 and 54 were corrected

## **Claims:**

- Title XIX and Waiver Code no longer cause claims exceptions caused by overlapping rules
- Rounding error that caused some SFMA postings to fail has been corrected

## **Reports:**

- Remittance Advice report now does not list providers whom the user does not have security permissions to see
- Remittance Advice report for SFMA run 175869 now available

**8/10/2005**

## **Claims:**

- The SEPA adjustment detail page was reformatted to sort adjustments consistently and improve the clarity of some labels
- SEPA adjustments that could not be approved because of the incorrect message "Signature did not match signature on file" can now be approved

(The task numbers are in parentheses.)



# Release Notes for eXPRS

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- If the SEPA adjustments signed by State and Contractor are different, eXPRS no longer reports that as a signature problem

**8/5/2005**

## **Claims:**

- An application error occurs when a claim with Title XIX eligibility is submitted.
- Claims with zero paid amount caused the Statewide Financial Management Application (SFMA) interface to fail.
- SE54 claims are priced using “Monthly-Fullrate” instead of “Monthly-prorate”.

**8/2/2005**

## **Claims:**

- SE54 Client Prior Authorization (CPA) is set to “Pending” status if SE50 CPA does not exist in the system.
- Set CPA rate limits to correct values: SE50=9000, SE51=5000, SE54=5000
- A voided claim does not release the CLA offset.
- CLA offsets not deducted from SE51 and SE141.

## **Reports:**

- Remittance Advice Run Summary totals appear doubled.

## **Security:**

- Users could not edit their own user account.
- Help Desk user role cannot access Manage Users from the left side menu.

**7/28/2005**

## **Claims:**

- CLA process changed to Monthly creation, and daily status update.
- DHS Contract number was added to Claim Search criteria page.
- A warning message will be displayed when a funding rule is updated showing the number of approved and the total paid amount that were processed with this rule.
- Procedures for Cash Advance process were added.
- Add funding rule validation that requires fund and appropriation if Title XIX is “Y”.

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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- Pressing submit from claim edit page automatically saves claim before submitting.
- Review detail results in error in View Liability Account screen.
- Claim view fails because Legal Client name is missing.
- Funding rule validation not enforcing fund and appropriation on account edits.
- Invalid error message when validating Provider and Prior Auth.
- Error in calculation of the Client Liability Offset.
- Document numbers in eXPRS SFMA interface not incrementing.

## **Enrollment:**

- Intermittent error when saving a provider.
- Improper navigation on Create Client screen.
- Search does not work if name has apostrophe.
- Calendar missing from DOB on Edit Client screen.

## **Prior Auth:**

- User now has ability to edit the entire CPA while it is in Draft status.
- A line for Draft SEPAs was added to Create PAL calculation.
- Error in SEPA Approval Unit status when PAL is exceeded.
- Error allowed PPAs for services that providers had not been assigned.
- SEPA exceeding PAL causes application error.
- Using more than 20 characters in the Contract Number field causes application error
- BA text field do not show maximum allowed characters.
- SEPA Required Units table headings are not in correct order.
- Unused checkbox appears in the view SEPA Screen.
- View attached file in BA causes application error.
- PPA totals are rounded in View PPA Summary screen.
- Contract appears multiple times in find contract screen.
- SEPA totals have rounding error.

## **Reports:**

- Monthly Security report has been added.
- Daily Security report has been added.
- SFMA Interface Summary report has been added.
- SFMA Interface Detail report has been added.
- Remittance Advice report selection now contains the Run ID.
- Remittance Advice report now shows Cash Advance type claims.
- The Remittance Advice report contains duplicate rows.

(The task numbers are in parentheses.)

# Release Notes for eXPRS

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## **Security:**

- Add client now available even if user search returns records.
- State Security Administrator can't update security rules.
- Role end date defaulted to invalid date.
- Add user screen allows more characters in the login name than the login screen.
- Deleted user can still log in.
- User account field Organization mislabeled.
- Local Security Administrator can see other organization level roles.
- Delete button removed from My Account screen.
- Email address not marked as required.
- Expired user roles show on view role screen.

## **General:**

- A link to the release notes has been added to the Application welcome page.
- A text message saying which environment (e.g. Production) the application is in has been added to the Login and Welcome pages.

(The task numbers are in parentheses.)