7.8.1 Release Notes

Last Modified on 08/29/2024 4:10 pm EDT

Estimated Release Date: **Monday, 08/26/2024**

Feature Enhancements:

Release 7.8.1	
Priorities added to the Activity Code Service Bundle List	*Maintenance and Setup > Activity Codes > Activity Code Bundle Setup* **Base Activity Codes** and **Code Groups** will require a **Priority Order** when adding or editing the Activity Code Service Bundle List. The Priority Order will determine the order in which the rules are run through in the Services Preprocessor to select the final **Bundled Activity Code**.
New Setup Option to Make Client Insurance Subscriber Fields Required	*NextStep Billing > Maintenance and Setup > Configuration Options > System tab > CTB tab > Page4 tab* There is now an option to **Require Client Insurance Subscriber Number, Name, Address, and DOB for non-Private Pay Party Types**'. This will affect the Client Insurance in both Clinical and NextStep Billing. When this box is checked, the following listed fields in**Client Insurance** will be required before being able to **Save** the Client Insurance. • **Subscriber Number** • **Subscriber First Name** • **Subscriber Last Name** • **DOB** • **Address** • **City** • **State** • **Zip** By default, this setup option will not be checked.

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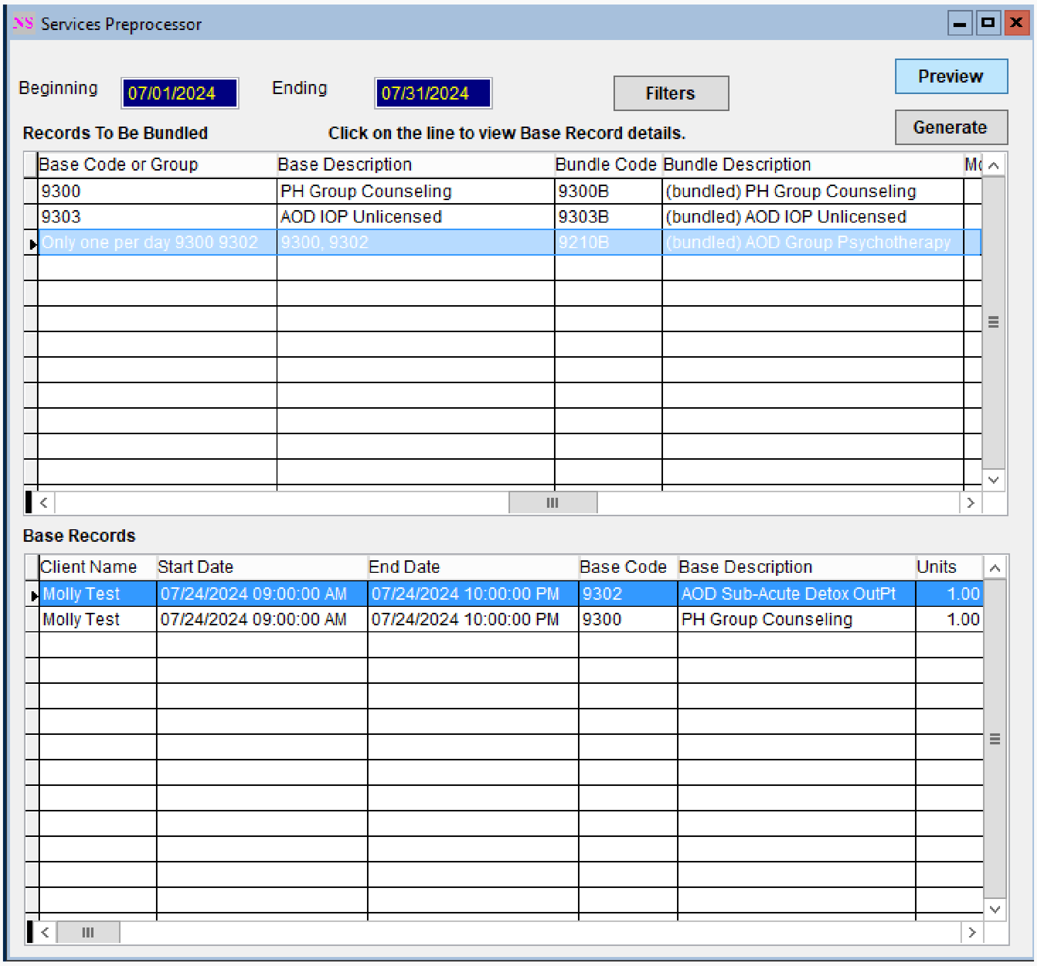
Details grid added to the Services Preprocessor

File > Services > Services > Services - Preprocessor Form

The Services Preprocessor has been redesigned to simplify the user workflow. Previously, the form was made up of a grid and filter option dropdowns. In the redesign, the form still includes the top grid labeled as **Records To Be Bundled** but we've also included a second grid that will populate the **Base Records** that are the source of the final **Bundle Code**. When clicking on a line from the top grid, the bottom grid will populate with the corresponding Line Items. The **Preview** and **Generate** functionality of the Services Preprocessor remains the same.

The only required filter remains the **Beginning** and **Ending** date range. Other filter options are still available by clicking the **Filters** button.



Resolved Issues:

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835 Form - Un-Roll Transactions checkbox	*Navigation Form > 835 Form* Previously when the **Un-Roll Transactions box** was checked and a payment that needed to be unrolled came back with different modifiers than what appeared on the Line Item, the lines would fall to the **Records Unable to Post** section. Now, when using that checkbox, the modifier will not be matched back to the Line Item and instead the other billing fields will be used to match back to a Line Item.