



August

2023 Release Notes



VBASoftware

General

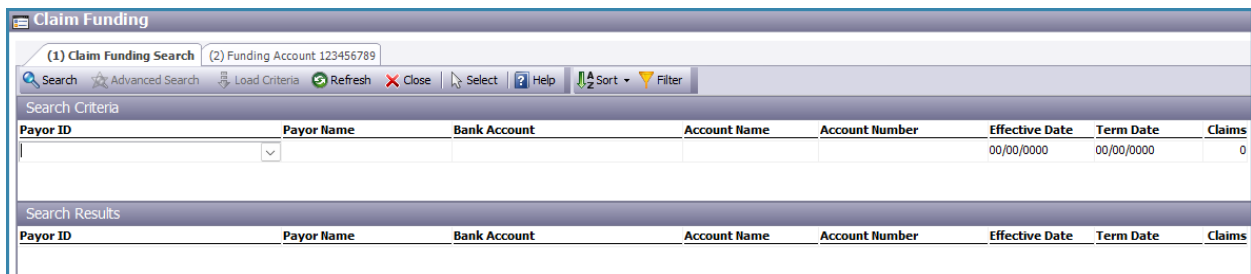
Zelis Table Added to Advanced Search and Criteria

[F23454] The 'CostContainZelisClaimReprice' table has been added to the 'Set Criteria' windows within 'Workflow Services' and 'Suspense Criteria'. It has also been added to 'Advanced Search' within 'Claims in Batch', 'Processed Claims', and 'Claim and Claim Batch'. This will allow Users to setup criteria that utilize various Zelis fields.

Accounting Services

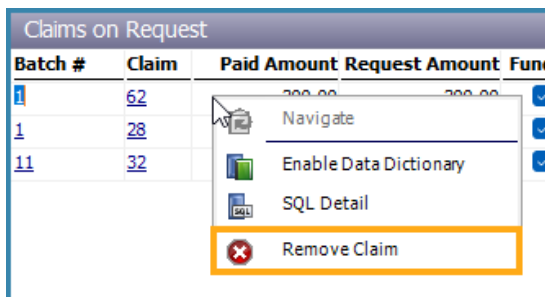
Claim Funding Search Fields

[F22551] Three new text fields have been added to the 'Claim Funding Search' screen: 'Payor Name', 'Account Name', and 'Account Number' as search criteria. The existing 'Payor ID' field has been changed from a drop-down field to a combination text/drop-down field. It will still function as it did previously, but Users may now also enter text and search for a specific Payor ID. Partial Payor IDs will not return results – they must be the full ID.



Claim Funding Remove Claim

[F23294] A new 'Remove Claim' menu item has been added to 'Claim Services' > 'Funding' > 'Requests'. This option will allow Users to select any claim and remove it from a funding request. When selecting this option, the User will be prompted to confirm the claim removal. Removing a claim from a funding request will set its status to 'Ready for Funding' and will recalculate the overall request amount. When this functionality is used, the 'Request' screen will close in order to reload the request information upon reopening.



Auth Services

Auth Review Added to Advanced Search

[F22601] The 'Auth Review' table and 'Auth Review Level', 'Auth Review Severity', 'Auth Review Status', 'Auth Review Type', and 'Auth Review Urgency Type' columns were added to the 'Auth Search' 'Advanced Search' screen. Users may also use these columns when using 'Sort' and 'Filter'.

Billing Services

Payment Method on Rates

[F23684] The 'Payment Method' field is now available on the 'Rate Definition' of 'Template' and 'Applied' rates and will now be used to match the 'Plan' and 'Payment Method' on an enrollment record when applying rates.

Claim Services

★ New Vision Claim Type

[F23689] A new 'Vision' Claim Type has been added. These claims will offer similar functionality to the 'Professional' Claim Type with some slight differences in what information is displayed. For more information on this new Claim Type, please reach out to the Help Desk.

Seq	Cap	Svc. Date	Svc. Thru	POB	Procedures	Modifier	Diag.	EDI	Billed	Units	Allowed	Retail Allowance	COB	Payable	Co-Pay	Co-Ins	Bed.	Ret. Cov.	Patient Play Date	Net Amount	Ex Codes	Auth. #	Benefit	Drug Code	Qty.	Unit							
01-08		08/01/2023	08/31/2023	21	92018				150.00	1.00	150.00		.00	145.00	35.00	.00	120.00	.00	145.00	.00	00	VBA001	VBA036	VBA037		145.00	.00						
										Claim Totals:	150.00	1.00	150.00			35.00	.00	120.00	.00	145.00	.00												
														Total Payable:	.00																		

Credentialing Services

Credentialing by Provider Profile

[F23691] A new 'Credential By Payee' flag has been added to the 'Application Settings' area of the 'VBA Control Panel'. When this option is selected, the 'Practice Details' window ('Credentialing Services' > 'Provider Credentials' > Select a Provider > 'Practice Details' from the 'Details' drop-down) automatically import office information from the Provider's data.

Enrollment Services

Disenroll Wizard Updates

[F15566] A new 'Member Table Options' screen has been added to the 'Disenroll Wizard' that will allow Users to individually select which Member records to update upon disenrolling an enrollment. Any table selected will have its 'End Date' or 'Term Date' updated to the disenroll date. On re-enroll, the 'End Date' or 'Term Date' for these tables will be updated to the enrollment 'End Date'. Exceptions for re-enrollment are the 'Account', 'Case Head', 'Class', 'Student Information', 'Eligibility Status', 'Rate Split', and 'Custom Ex Code' tables which will be updated to empty 'NULL' dates.

Enrollment Disenroll Wizard

Member Table Options
This step gives options to apply a term date on additional member table records.

Beneficiary: <input type="checkbox"/>	Network Override: <input type="checkbox"/>
Case Head: <input type="checkbox"/>	Occupations: <input type="checkbox"/>
Class: <input type="checkbox"/>	Other Insurance: <input type="checkbox"/>
Custom Ex Code: <input type="checkbox"/>	PCP: <input type="checkbox"/>
Eligibility Status: <input type="checkbox"/>	Premiums: <input type="checkbox"/>
Financial	Rate Split: <input type="checkbox"/>
Account: <input type="checkbox"/>	Student Information: <input type="checkbox"/>
Tax: <input type="checkbox"/>	Waive Premium: <input type="checkbox"/>
Flex: <input type="checkbox"/>	

Buttons: Cancel, Back, **Next**, Finish

★ Invoice Summary by Member

[F22015] A new 'Invoice Summary' screen has been added to the 'Details' drop-down menu for enrollments. This screen will allow Users to view an 'Invoice Summary' and a list of invoices involved in that summary filtered by 'Invoice Year' and 'Plan'.

Invoice Summary

Close Help

Invoice Year: All Years Plan: - All Plans

	Premium	Received
	105.00	.00
Dental - Dental Plan	555.00	.00
NHTEST2022 - Nathan's Training Plan 2022	1,320.00	.00
NHTEST2023 - Nathan's Training Plan 2023	1,081.67	.00

Invoices

Invoice #	Inv. Date	Due Date	Bill From	Bill Thru	Plan	Prem.	Prem. Rcvd.
000002050	04/01/2023	04/01/2023	04/01/2023	04/30/2023	NHTest2023 - Nathan's Training Plan	220.00	.00
000002050	04/01/2023	04/01/2023	04/01/2023	04/30/2023	Dental - Dental Plan	30.00	.00
000002050	04/01/2023	04/01/2023	04/01/2023	04/30/2023		5.00	.00
000002049	03/01/2023	03/01/2023	03/01/2023	03/31/2023	NHTest2023 - Nathan's Training Plan	220.00	.00
000002049	03/01/2023	03/01/2023	03/01/2023	03/31/2023		10.00	.00
000002049	03/01/2023	03/01/2023	03/01/2023	03/31/2023	Dental - Dental Plan	30.00	.00
000002048	02/01/2023	02/01/2023	02/01/2023	02/28/2023	Dental - Dental Plan	55.00	.00
000002048	02/01/2023	02/01/2023	02/01/2023	02/28/2023	NHTest2023 - Nathan's Training Plan	220.00	.00
000002048	02/01/2023	02/01/2023	02/01/2023	02/28/2023		10.00	.00
000001878	01/01/2023	01/01/2023	01/01/2023	12/31/2023		10.00	.00
000001878	01/01/2023	01/01/2023	01/01/2023	12/31/2023	NHTest2023 - Nathan's Training Plan	201.67	.00
000001878	01/01/2023	01/01/2023	01/01/2023	12/31/2023	Dental - Dental Plan	55.00	.00

★ Remaining Column Added to Accumulator Information

[F23692] A new 'Remaining' column has been added to the 'Plan Accumulator' section of the 'Accumulator Information' screen that will allow Users to quickly view how much remaining 'Deductible', 'Co Insurance', 'Out of Pocket', etc. without manual calculations.

Plan Accumulator

Deductible							Out of Pocket						
	Member Used	Member Max	Member Rem.	Family Used	Family Max	Family Rem.		Member Used	Member Max	Member Rem.	Family Used	Family Max	Family Rem.
In Network	1,945.00	2,000.00	55.00	3,060.00	4,000.00	940.00	In Network	2,721.34	4,000.00	1,278.66	4,004.34	8,000.00	3,995.66
Out of Network	410.00	4,000.00	3,590.00	885.00	8,000.00	7,115.00	Out of Network	410.00	8,000.00	7,590.00	885.00	14,000.00	13,115.00
Total	2,355.00	6,000.00	3,645.00	3,945.00	12,000.00	8,055.00	Total	3,131.34	12,000.00	8,868.66	4,889.34	22,000.00	17,110.66

Deductible Credit

	Member Used	Member Max	Member Rem.	Family Used	Family Max	Family Rem.
In Network	.00	.00	.00	.00	.00	.00
Out of Network	.00	.00	.00	.00	.00	.00
Total	.00	.00	.00	.00	.00	.00

Benefit Paid

	Member Used	Member Max	Member Rem.	Family Used	Family Max	Family Rem.
Plan Year	18,080.16	999,999,999.99	999,981,919.83	19,064.37	999,999,999.99	999,980,935.62
Lifetime	186,403.91	999,999,999.99	999,813,596.08	198,644.46	999,999,999.99	999,801,355.53

COB Savings: Used: Max: .00

Plan Currency: U.S. Dollars (USD)

Benefit Accumulator List

- Benefits
 - Plan Level Maximum
 - 1100 - Physician Services-Office Medical Care
 - 1113 - ER Services-Facility/Hospital
 - 1114 - IP Hospital/Facility Services
 - 1119 - Mental Health Services-Transitional
 - 1125 - Immunizations/Vaccinations
 - 1126 - Ophthalmology Services
 - 1129 - Chiro Services
 - 1141 - Sleep Medicine
 - 1167 - Bariatric Surgery
 - 1169 - Accidental Injury
 - Q4 - 4th Quarter Carry
- Added Accumulators
- Plan Max Benefits

Deductible							Benefit Counts						
	Member Used	Member Max	Member Rem.	Family Used	Family Max	Family Rem.	Claims	Svc. Lines	Visits	Units	Svc. Days		
In Network	813.58	2,000.00	1,186.42	898.29	4,000.00	3,101.71	0	0	0	.00	0		
Out of Network	.00	4,000.00	4,000.00	.00	8,000.00	8,000.00	0	0	0	.00	0		
Total	813.58	6,000.00	5,186.42	898.29	12,000.00	11,101.71							

Deductible Credit

	Member Used	Member Max	Member Rem.	Family Used	Family Max	Family Rem.
In Network	.00	.00	.00	.00	.00	.00
Out of Network	.00	.00	.00	.00	.00	.00
Total	.00	.00	.00	.00	.00	.00

COB Savings

	Member Used	Member Max	Member Rem.	Family Used	Family Max	Family Rem.
In Network	18.00	2,000.00	1,982.00	136.00	4,000.00	3,864.00
Out of Network	.00	4,000.00	4,000.00	.00	6,000.00	6,000.00
Total	18.00	6,000.00	5,982.00	136.00	10,000.00	9,864.00

Out of Pocket

	Member Used	Member Max	Member Rem.	Family Used	Family Max	Family Rem.
In Network	831.58	4,000.00	3,168.42	1,034.29	8,000.00	6,965.71
Out of Network	.00	8,000.00	8,000.00	.00	14,000.00	14,000.00
Total	831.58	12,000.00	11,168.42	1,034.29	22,000.00	20,965.71

Benefit Paid

	Member Used	Member Max	Member Rem.	Family Used	Family Max	Family Rem.
Plan Year	72.00	999,999,999.99	999,999,927.99	544.00	999,999,999.99	999,999,455.99
Lifetime	7,689.30	999,999,999.99	999,992,310.69	9,556.50	999,999,999.99	999,990,443.49

Provider Services

Prior Auth Exempt Providers

[F22688] 'Auth Exempt Procedures' ('Provider Services' > 'Providers' > search for a Provider > Select 'Details' from the header menu) will now be verified against both 'Procedure Codes' on a claim's detail line. In addition, adjudication will check the 'Referring' and 'Attending' Providers if listed on the claim to see if they are exempt from authorizations via this functionality.

Reinsurance Services

Reimburse Method Added to Search

[F22550] 'Reimburse Method' has been added as a search criteria on the 'Contract Search' screen.

Search Criteria										
Contract ID	Contract Description	Eff. Date	Term. Date	Contract Type	Contract Status	Insurance Carrier	Group ID	Division ID	Subscriber ID	Reimburse Method
		00/00/0000	00/00/0000							
Search Results										
Contract ID	Contract Description	Eff. Date	Term. Date	Contract Type	Contract Status	Insurance Carrier	Group ID	Division ID	Subscriber ID	Reimburse Method
REINSTEMPLATE	Template reins level template	01/01/2013	12/31/2013			12345678 - reins#3				Pay and Reimburse
REINSTEMPLATE	Template reins level template	01/01/2013	02/28/2013			12345678 - reins#3	ABC100			Pay and Reimburse
Test	Test Template Contract	01/01/2012	12/31/2013				65201			Pay and Reimburse
3344	New Contract	12/12/2012	12/12/2014				65201			Pay and Reimburse
REINSTEMPLATE	Template reins level template	01/01/2013	12/31/2013			12345678 - reins#3	VBA001			Pay and Reimburse
REINSTEMPLATE	Template reins level template	07/01/2013	10/31/2013			12345678 - reins#3	VBAABC			Pay and Reimburse
REINSTEMPLATE	Template reins level template	01/01/2013	06/30/2013			12345678 - reins#3	VBAABC			Pay and Reimburse
REINSTEMPLATE	Template reins level template	03/01/2013	03/31/2013			12345678 - reins#3	ABC100			Pay and Reimburse
2011 Contract	GRPSMP 2011	01/01/2011	12/31/2011	12/12 Contract	Open Contract		VBA001			Spec. Advance Fund
2018_VBA001	VBA001 2018 Contract	01/01/2018	12/31/2018	12/12 Contract	Open Contract	Test Reinsurance - Test Reinsuranc	VBA001			Spec. Advance Fund

VBA Gateway Services

Alternate, Unique, and Medicaid ID Added to Requests

[F23932] 'Alternate ID', 'Unique ID', and 'Medicaid ID' fields have been added to Gateway requests. These fields will now be pulled into VBA Software when entered on a Gateway request.

Request Details

Group: VBA001 Fox Valley Holdings

Division: Active Active Division

First Name: Jon Subscriber ID:

Middle Name: SSN: 654987654

Last Name: Snow

Eff./Employ Date: 01/01/2015 01/01/2015

Reenrollment:

DoB: 05/05/1980 Sex: Male Marital Status: M

Alternate ID:

Unique ID:

Medicaid ID:

New Security Objects

Here are the new security objects for this release:

Security Object	Object Location	Related Feature
Enrollment Member Invoice Summary	Enrollment Services	F22015