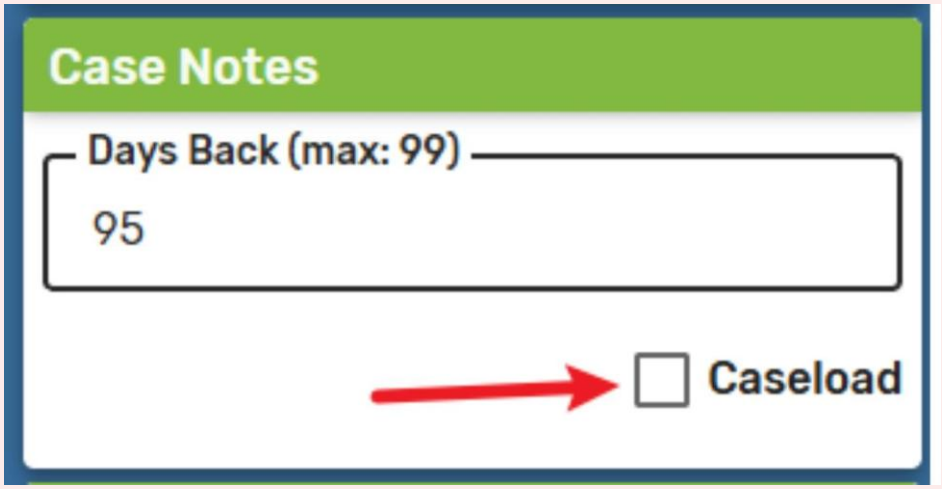
Advisor 2026.6.0 What's New

Anywhere Case Notes

You can now set a default for whether new case notes only show consumers on your caseload. Set your preference from the Case Notes default settings, and it will automatically apply each time you start a new case note entry.



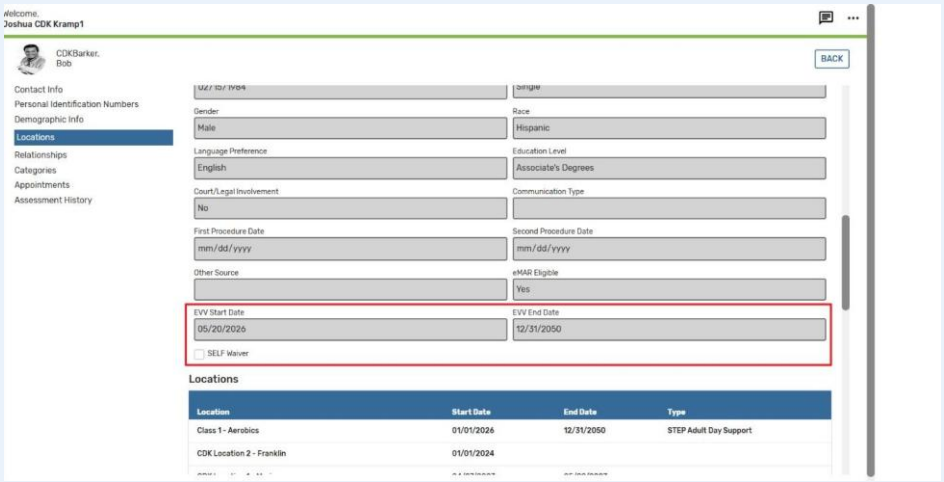
Ticket 124842

You can now email case notes directly from the Anywhere Case Notes Review grid.

Ticket 191970

Anywhere Demographics

Advisor Anywhere now shows EVV Start Date, EVV End Date, and SELF Waiver checkbox on the Demographics page for consumers whose vendor sends EVV data. These fields are view-only.



Ticket 162718

Anywhere Employment

Anywhere Employment now allows a position's start date to be set in the future, so employers can add an upcoming position for someone before their first day arrives.

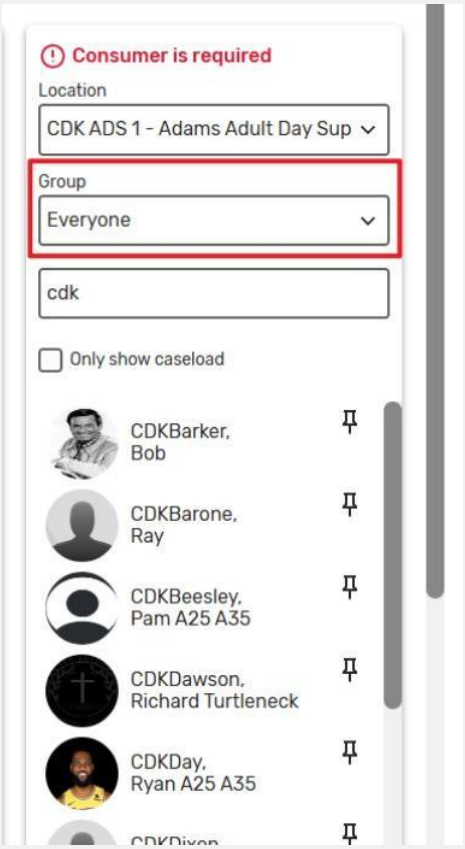
Ticket 199092

Anywhere General

Report and PDF downloads in Anywhere now complete more reliably, including for organizations with extra network security layers that previously caused downloads to hang or spin indefinitely.

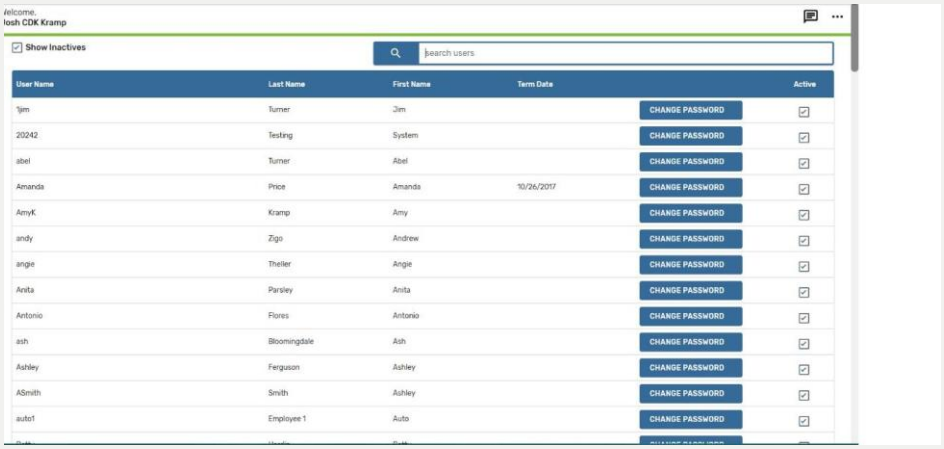
Ticket 175833

You can now filter by Location and Group directly on the consumer rosters in Anywhere New Case Notes, Anywhere Waiting List, and the new Anywhere Incident Tracking page.



Ticket 189256

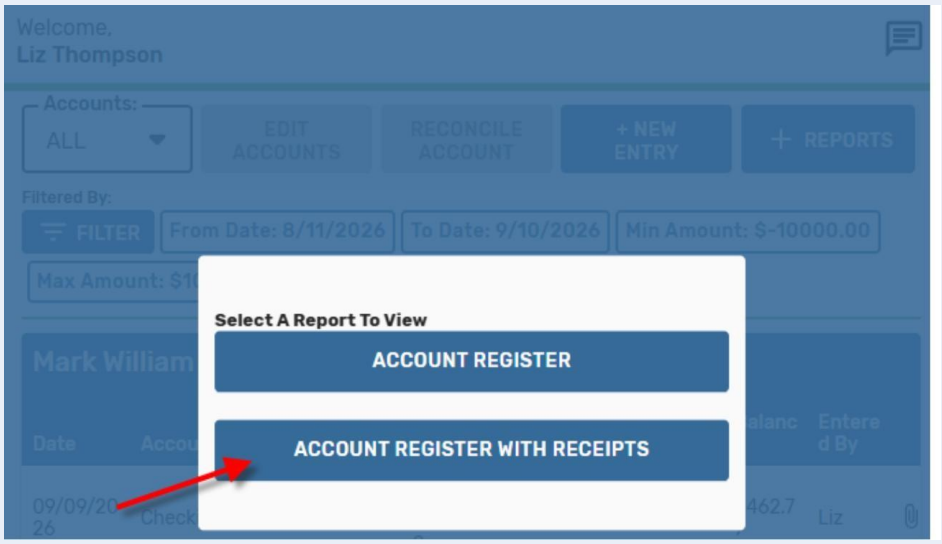
The Reset Passwords page now shows each employee's term date, so you can quickly see whether a user is terminated without having to look them up elsewhere.



Ticket 212245

Anywhere Money Management

Money Management's Account Register now offers an "Account Register with Receipts" report option. Run it the same way as the standard Account Register report to get a copy that also includes the receipt images attached to each transaction.



Ticket 209664

Anywhere Outcomes & Services

You can now import Outcomes and Services from any County Board. In the Outcome Import window, choose the Anywhere plan PDF option for county boards using Gatekeeper. For other counties, use the Other option. You can edit the services right on the import page before you pick the ones to import, so nothing has to be retyped by hand.

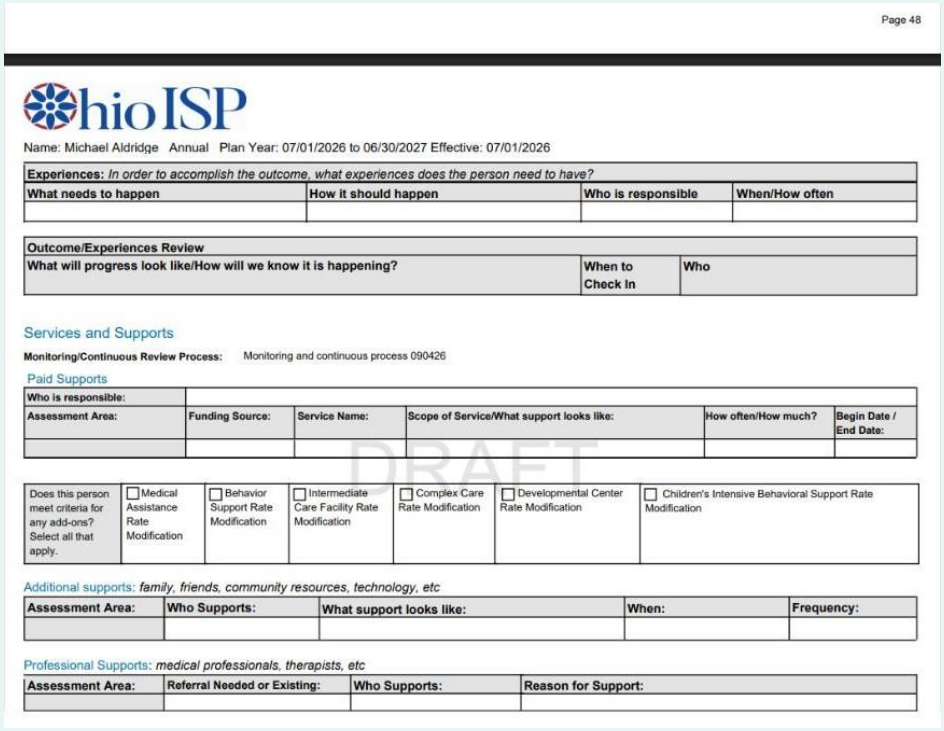
Ticket 197910

Users can now delete outcomes and services in Anywhere Outcomes, so an item added or imported by mistake no longer has to stay in the system. Trash can icons appear on outcomes and services for users with the appropriate security access, and the system will block the deletion of anything that already has documentation or activity tied to it, keeping your records safe.

Ticket 205478

Anywhere Plan

We corrected a bug that caused the Monitoring / Continuous Review Process field to not display on the plan report.



Page 48

Ohio ISP

Name: Michael Aldridge Annual Plan Year: 07/01/2026 to 06/30/2027 Effective: 07/01/2026

Experiences: *In order to accomplish the outcome, what experiences does the person need to have?*			
What needs to happen	**How it should happen**	**Who is responsible**	**When/How often**

Outcome/Experiences Review		
What will progress look like/How will we know it is happening?	**When to Check In**	**Who**

Services and Supports

Monitoring/Continuous Review Process: Monitoring and continuous process 090426

Paid Supports

Who is responsible:					
Assessment Area:	**Funding Source:**	**Service Name:**	**Scope of Service/What support looks like:**	**How often/How much?**	**Begin Date / End Date:**

DRAFT

Does this person meet criteria for any add-ons? Select all that apply.	☐ Medical Assistance Rate Modification	☐ Behavior Support Rate Modification	☐ Intermediate Care Facility Rate Modification	☐ Complex Care Rate Modification	☐ Developmental Center Rate Modification	☐ Children's Intensive Behavioral Support Rate Modification

Additional supports: *family, friends, community resources, technology, etc*

Assessment Area:	**Who Supports:**	**What support looks like:**	**When:**	**Frequency:**

Professional Supports: *medical professionals, therapists, etc*

Assessment Area:	**Referral Needed or Existing:**	**Who Supports:**	**Reason for Support:**

Ticket 209613

Anywhere Scheduling

The Scheduling page now includes a COPY SHIFTS button that lets you copy a whole range of shifts to a new date range, so you no longer have to rebuild a repeating schedule by hand. You can copy shifts for one location or all locations, for a single employee, several employees, or everyone, and you can choose whether to include open shifts, publish the new shifts right away, and notify the employees who are scheduled. If someone cannot take a copied shift because they already have an overlapping shift, an approved day off, or a termination date, you are asked whether to create those as open shifts instead, and you get a list of the open shifts that were created. The COPY SHIFTS button is available to users who have the Scheduler security key for the Anywhere Scheduling window.

Ticket 162055

The scheduling calendar now loads much faster. It only retrieves the shifts for the time period you're currently viewing instead of pulling in every shift on file, so moving between months, weeks, and days is quicker.

Ticket 192697

On the New! Schedules page in Month view, clicking an open space on a day now opens the Add New Shift pop-up with that day's date already filled in. This gives users with the Scheduler security key a faster way to add a shift, and clicking on an existing shift still works exactly as before.

Ticket 196780

The Employees Trained by Location page no longer lists training requirements where the employee is exempt.

Ticket 206380

Employees can now see their coworkers' schedules at the locations where they work. A new Show Other Employee Shifts option appears beneath Show Open Shifts in Week and Day view. Choosing Yes adds the published shifts of other employees at any location the employee has worked. Other employees' shifts appear faded so they are easy to tell apart from your own, and selecting one opens the usual shift details without the option to call off. This option is available to employees who do not have the Scheduler security key.

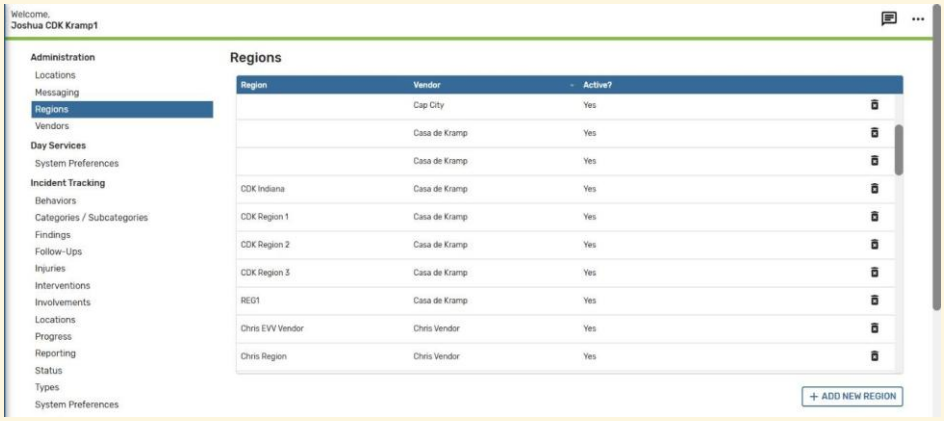
Ticket 215199

Anywhere Setup

Locations can now be set up and managed directly in Anywhere. From Setup, you can view your list of locations, add a new one, edit details like address, region, and time zone, and remove locations that are no longer in use, all without needing the desktop application.

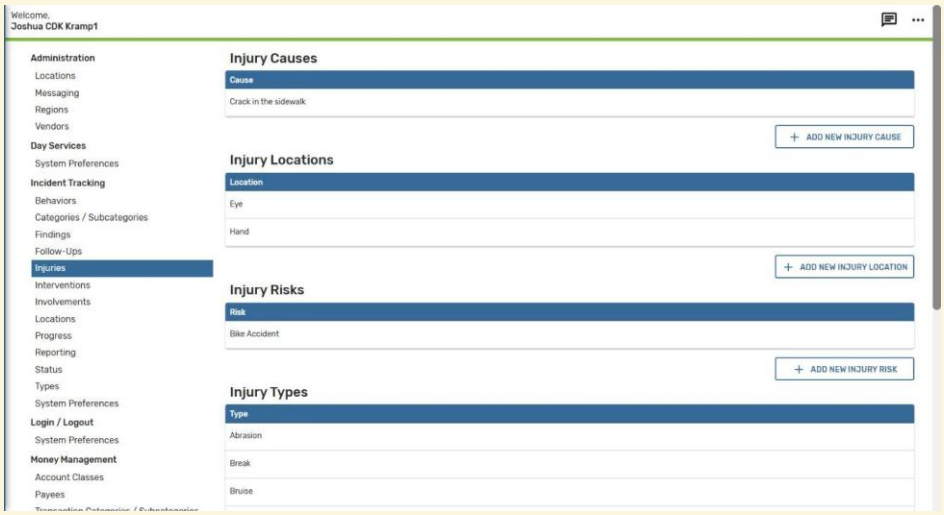
Ticket 162981

Anywhere Setup now includes a new Regions page, where you can view, add, and manage the regions used elsewhere in the system, along with each region's vendor, short description, bill code, and payroll department. Existing regions are listed alphabetically, and you can add a new region or remove one that's no longer needed (regions currently in use elsewhere can't be deleted).



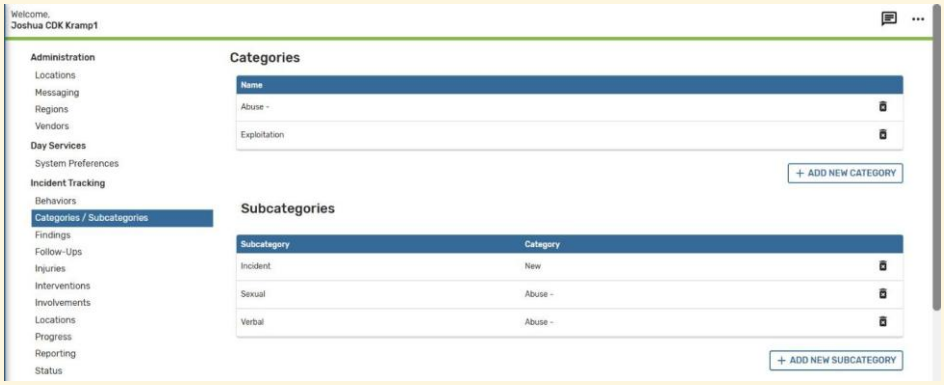
Ticket 201084

Advisor Anywhere now includes an Injuries setup page under Incident Tracking, giving administrators an easy way to maintain the lists of injury causes, locations, risks, and types used when documenting an incident. Injury locations can also be mapped to a body diagram, making it simple to record exactly where on the body an injury occurred. Each list can be added to, updated, or removed directly from the setup page, based on a user's security permissions.



Ticket 204357

A new Categories/Subcategories setup page has been added to Incident Tracking Setup, giving users a central place to manage the categories and subcategories used to classify incidents. From here, categories and subcategories can be added, renamed, or removed based on your security access, and the system will prevent deleting a category or subcategory that is still tied to an existing incident.



Ticket 210073

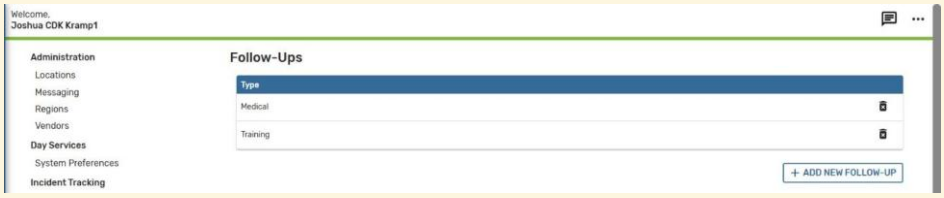
You can now set up a list of Behaviors in Anywhere Incident Tracking setup. This new setup page lets you add, edit, and remove the Behavior options staff choose from when documenting a consumer's behavior during an incident, so your Behaviors list can be tailored and kept up to date without contacting support.

Ticket 210988

You can now set up a list of Findings in Anywhere Incident Tracking setup. This new setup page lets you add, edit, and remove the Finding options staff choose from when documenting the outcome of an incident review, so your Findings list can be tailored and kept up to date without contacting support.

Ticket 211197

A new Follow-Ups setup page has been added to Incident Tracking Setup, allowing users to view, add, edit, and delete the follow-up types used on incident records. If a follow-up type is currently in use elsewhere, the system will let you know it cannot be deleted, helping keep your incident records accurate.

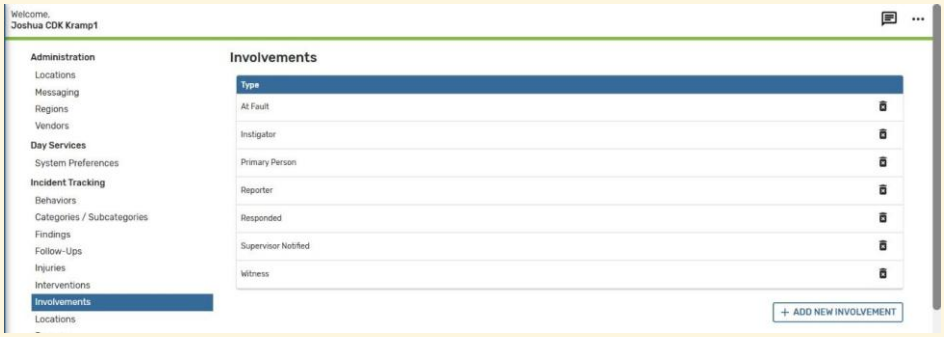


Ticket 212213

You can now set up a list of Interventions in Anywhere Incident Tracking setup. This new setup page lets you add, edit, and remove the Intervention options staff choose from when documenting how an incident was responded to, so your Interventions list can be tailored and kept up to date without contacting support.

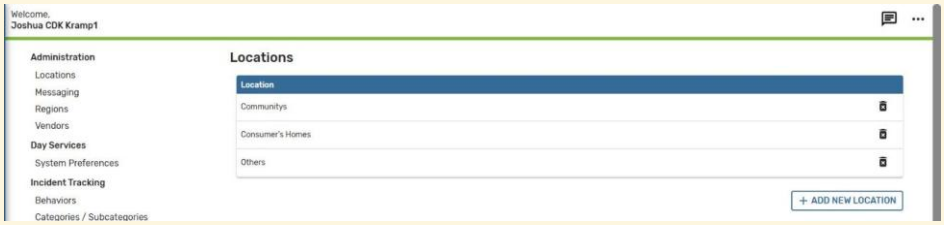
Ticket 212338

You can now set up a list of Involvements in Anywhere Incident Tracking setup. This new setup page lets you add, edit, and remove the Involvement options staff choose from when documenting who was involved in an incident, so your Involvements list can be tailored and kept up to date without contacting support.



Ticket 212339

Anywhere Incident Tracking Setup now includes a new Locations page, where you can view, add, and manage the list of locations available when logging incidents. Existing locations are listed alphabetically, and you can add a new location or remove one that's no longer needed (locations currently in use elsewhere can't be deleted).

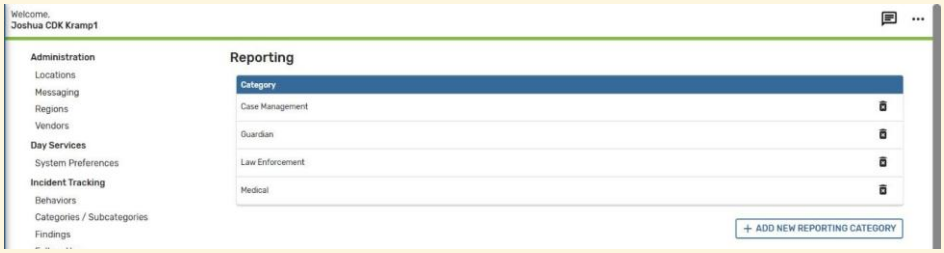


Ticket 212943

You can now manage your own list of incident progress types directly in Anywhere. From Setup > Incident Tracking, add, edit, or remove progress types without needing the desktop application. Types that are already in use elsewhere are protected from deletion.

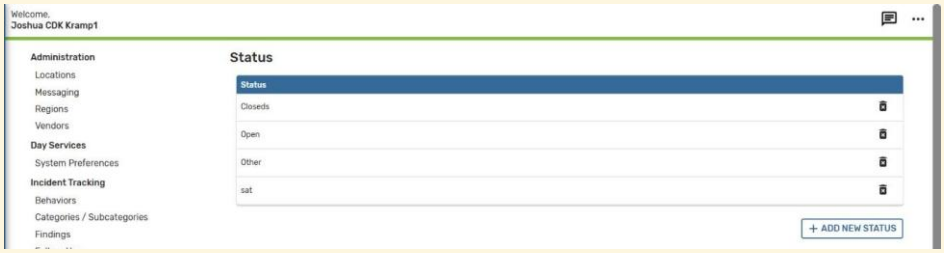
Ticket 212945

Anywhere Incident Tracking Setup now includes a new Reporting page, where you can view, add, and manage the list of reporting categories available for incidents. Existing categories are listed alphabetically, and you can add a new category or remove one that's no longer needed (categories currently in use elsewhere can't be deleted).



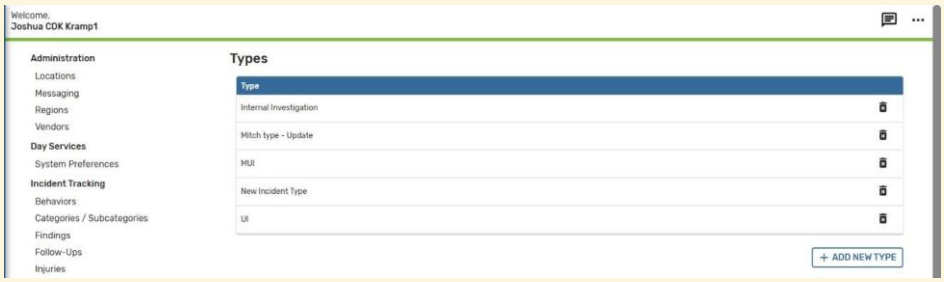
Ticket 213499

Anywhere Incident Tracking Setup now includes a new Status page, where you can view, add, and manage the list of statuses available for incidents. Existing statuses are listed alphabetically, and you can add a new status or remove one that's no longer needed (statuses currently in use elsewhere can't be deleted).



Ticket 213500

Anywhere Incident Tracking Setup now includes a new Types page, where you can view, add, and manage the list of incident types available when logging incidents. Existing types are listed alphabetically, and you can add a new type or remove one that's no longer needed (types currently in use elsewhere can't be deleted).



Ticket 213775

Anywhere Time Entry

Location lists in Time Entry and the Roster filter now load much faster for organizations with a large number of locations, eliminating the long delays some users were experiencing. Filtering the Roster by location continues to work correctly for every user, regardless of how their location access is set up.

Ticket 189252

Time entries in Anywhere now consistently record the end location's latitude and longitude when an end time is added, fixing an intermittent issue where those values could be left blank.

Ticket 204155

Time Entry now correctly keeps the geolocation recorded when an end time is first entered on a time record. Previously, editing that end time again later (from either the Time Review or Time Approval page) could change the saved geolocation; now the original geolocation is locked in and stays accurate no matter how many times the entry is updated afterward.

Ticket 209838

Changing the work code on an existing time entry no longer clears out the location. On both the Time Review and Time Approval pages, the location stays on the record when you change the work code and save.

Ticket 216385

Anywhere Transportation

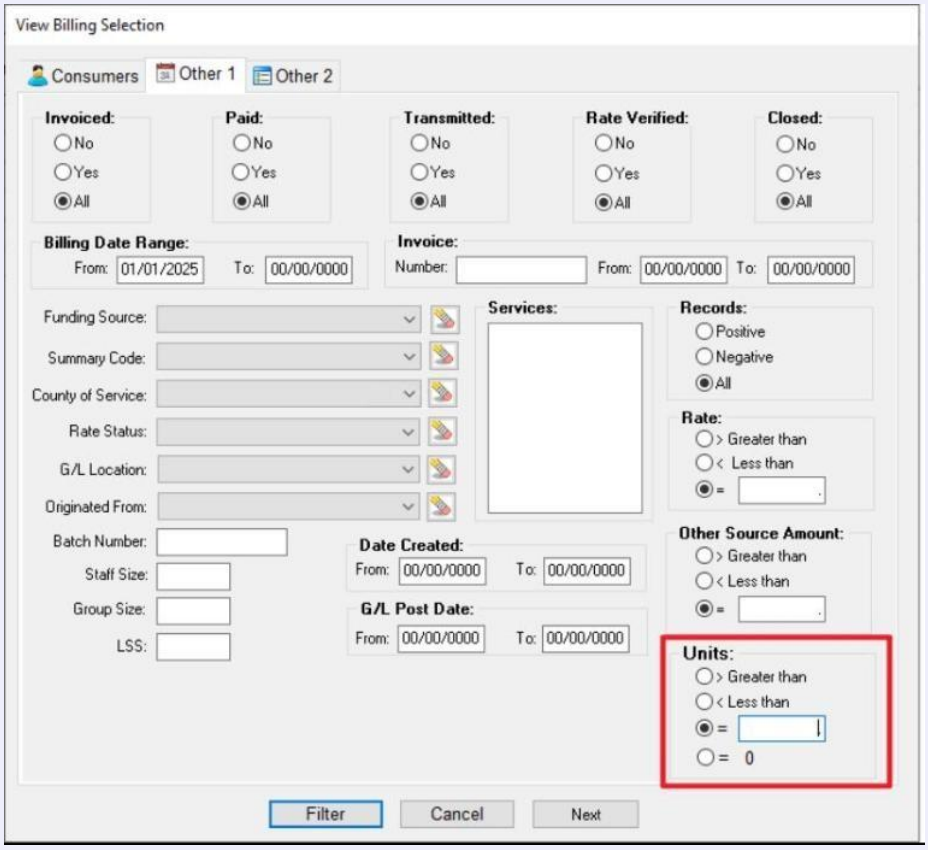
You can now copy transportation routes from one date range to another instead of entering them all over again. A new COPY ROUTES button on the MANAGE ROUTES page in Anywhere Transportation lets you narrow down what you want to copy by location, route name, driver and vehicle, pick the date range you are copying from, and then enter the new start date. The end date fills in for you so the new range covers the same number of days. If a route or an individual has to be skipped because the driver is not eligible, the vehicle is inactive, or the individual is inactive, a message will let you know. The COPY ROUTES button is available to users who have the Add Routes security key for Anywhere Transportation.

Ticket 100100

Billing / Receivables

The View Billing filter now includes a Units filter. On the Other 1 tab you will find a Units section, directly below Other Source Amount, where you can filter by greater than, less than, equal to a value you enter, or equal to zero. Values can be positive or negative and can include up to two decimal places.

The list of billing records then shows only the records whose Invoice Units match what you entered, making it much easier to find billing with a specific number of units or to track down records with unexpected unit amounts.



Ticket 213406

The Verify Rates process on the Create Invoices window now accepts the updated rate verification file layout from the state, in addition to the layout that was used previously, so you can keep verifying rates no matter which version of the file you download. Longevity add-on amounts are also now read at their full value, so larger add-on rates come in correctly instead of having a digit dropped.

Ticket 215965

Report Server

A report that ran into trouble while it was processing no longer gets stuck and holds up the report queue. After a few attempts, an affected report is now automatically removed and an email notification is sent, so other reports continue running normally instead of getting stuck behind it.

Ticket 209086

Reports

The Detailed Payroll Batch Report - By Department and Employee ID now has a Job Site filter. If you work with more than one job site, you can run the report for just the site you need instead of pulling everything at once. Leave the filter blank and the report returns all job sites, the same as it always has.

Ticket 156568

The Documentation - Service Delivery Comparison report now only shows activity that took place at the location listed for that section of the report. Previously, an activity record with a missing or different location could appear under the wrong location, which could make it look like a service happened somewhere it didn't; that activity is now correctly excluded from that location's section.

Ticket 161957

The Individual Day Service Activity report has been cleaned up. The Day Service Type now prints as plain text instead of appearing inside a dropdown box, so the report is easier to read on screen and in print. The same change carries through to the Consumer Day Service Activity - By Location and Date of Service report. Everything else on the report is unchanged.

Ticket 174635

The Utilization – Location Cost History – Hours report now includes every billable time entry when calculating Billed Hours. Separate entries that share the same date, location, and number of hours – such as two employees who each worked one hour at the same location on the same day – are each counted individually, so the report's Billed Hours total matches the actual hours worked.

Ticket 186633

A new report, Day Service and Anywhere Transportation Time Comparison - All Locations, is now available in the Reports area. This report shows a consumer's day service and transportation activity for a given date even when the two occurred at different locations, with the location noted right on each line, making it easier to see the full picture of a consumer's day without being limited to a single site.

Ticket 193088

The Billing Summary report now displays large dollar amounts in full. Amounts and totals that used to run out of room in their columns are shown completely, so you can read the whole figure no matter how large it gets. The rest of the report looks and works the same as before.

Ticket 195373

Transportation-related reports that used to be grouped under the Day Services folder in the Reports window now appear in the Transportation folder, so all of your transportation reports are in one place and easier to find. The reports themselves are unchanged, and any favorites, memorized filters and sorts, and scheduled runs you have already set up for them continue to work as before.

Ticket 196355

A new report, Routes Not Batched - Excluding No Attendance, is now available in the Anywhere Transportation folder of the Reports window. Like the existing Routes Not Batched report, it shows the routes for which billing has not yet been generated, but it leaves out any route where no attendance has been marked for any of the consumers on it. That way the list only includes the routes that are actually ready for you to act on. The original Routes Not Batched report is unchanged and still available.

Ticket 209663

Three reports used for compliance documentation now show more of the information you need in one place. On the Habilitation Documentation - All report, the addresses of the locations represented on each page now appear beneath the Outcome Type, and the Billing # label now reads Billing/Medicaid #. On both Outcome Activity Details reports - the one with day service billing information and the one with non-day service billing information - the consumer's Billing/Medicaid # is now clearly labeled beside their name, and the address of the location displays beneath the Location field. All three reports can now be found in the Compliance folder of the Reports window.

Ticket 211375

The Check Listing by Invoice Number report now includes a Location filter, so you can narrow the report down to checks for a specific location instead of reviewing the full list.

Ticket 213397

The AA Location Single Entry Detail report now lists the initials for every consumer tied to an entry, wrapping onto additional lines when needed instead of cutting the list short.

Ticket 215969

Single Entry

A new CRSI - UKG payroll export option is now available from the Vendors screen. When a payroll export is run for a vendor using this option, two ready-to-use files are created automatically — one with employee time entries and one with reimbursable mileage — already formatted for import into UKG, so this payroll and mileage data no longer needs to be reformatted by hand before it can be submitted.

Ticket 217464