expEDIum Medical Billing v5.7

Release Notes

Release Date | February 06, 2021

iTech Workshop®
Data Integration for Healthcare

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Data Integration for Healthcare

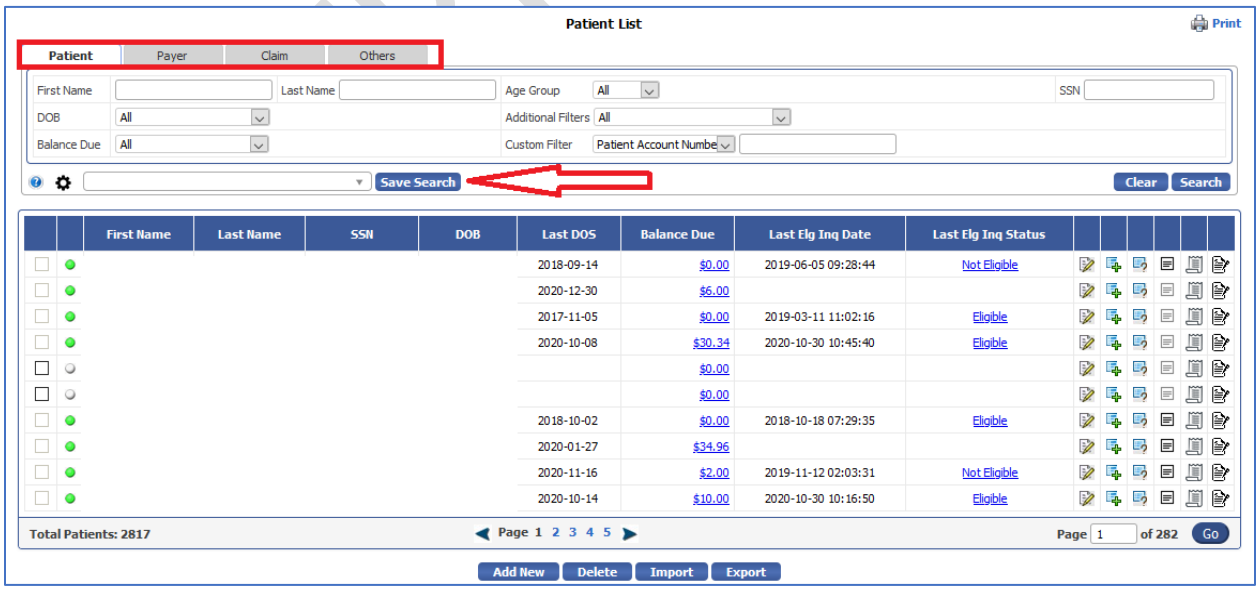
expEDIum Medical Billing v5.7 Release Notes

This release note describes tickets that are either enhancements or new features or bug fixes. Some tickets may refer to other tickets from previous releases. These tickets are combination of change requests from any of our partners and are internally identified at iTech. A summary of tickets is provided in the last page. On request, we can provide any specific release note for any earlier release. This release note is also available from our website at http://www.itechws.com/releasenote.

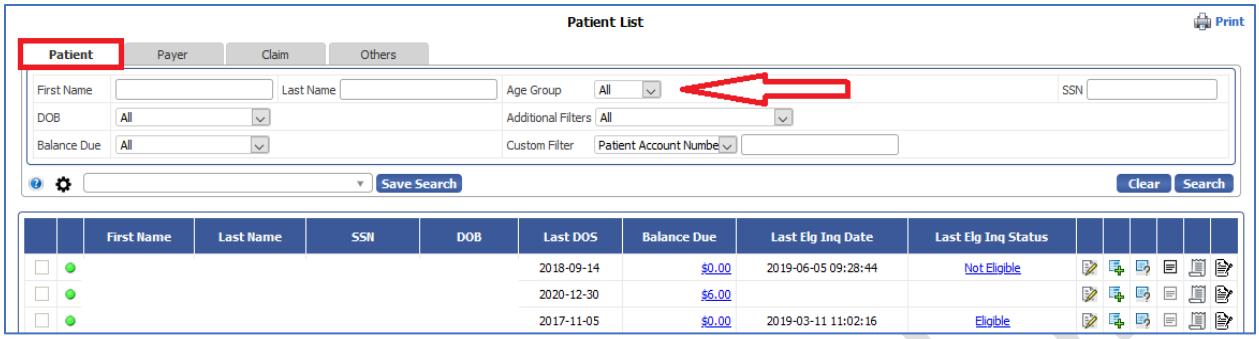
1) [Ticket #12687] iTech: Patient List Screen - Search Enhancement

An enhancement is made in the "Patient List" screen to avoid excessive data traffic and to limit patient search result based on various filters. In this version, we have categorized the patient list search filters in to four tabs, such as **Patient, Payer, Claim,** and **Others, each tab covering specific group of filters.** This view will help the users fetch patients based on relevant filters in the Patient List screen.

Earlier, we had introduced the "Saved Search" feature in various Search screens and Report screens to save the search criteria and search for claims and reports on the saved criteria. In this version, we have introduced the "Save Search" feature in the Patient View List screen too. This feature will work the same way as the Save Search in the Search screens and Report screens. The Save Search feature in the Patient List screen will fetch Patients based on those saved criteria. Again, this feature is introduced to optimize the Patient dataset the clinics and billers would work with frequently. Earlier, if a clinic had a roster of ten thousand patients, the billers would get to see ALL ten thousand patients listed in this view but with this optimization, clinics can choose to view much smaller sub-set of patients.



1) **Patient Tab** – The patient tab will display the patient-related filters such as First Name, Last Name, DOB, Balance Due, Age group, Additional Filters on patient info, Custom Filter and SSN. Age group is a newly introduced filter. The user can filter patients based on the patient details.



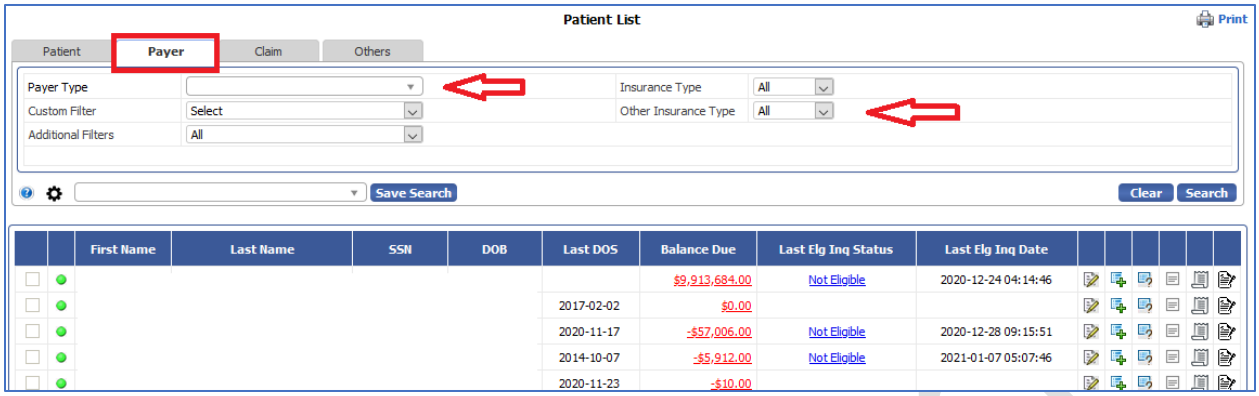
a) Age Group - The Age Group filter will display a list of age criteria between the range. By default, the Age Group filter will display "All". The user can select the age group from the list to fetch the data or customize the age group search. We have revised the age group filter to minimize the filter size.

b) Balance Due- We have added two new options, "Greater than or equal to" and "Less than or equal to" in the Balance Due filter. By default, the All option will be selected.

c) Additional Filters – A new filter, "Patients Flagged for Collection," is added in the Additional Filters dropdown with the existing patient additional filters. The "Patients Flagged for Collection" will have sub-options such as All, On, On or Before and Between. By default, "All" will be selected. The user can select the sub option to fetch patients that are flagged for collection.

d) Custom Filter – The custom filter will display options such as Patient Account Number, Patient City, Patient Zip, Employer/School Name, Patient System ID, Patient Created Date (Newly added), and Patient Modified Date, with sub filters. By default, the Patient Account Number filter will be selected.

2) **Payer Tab** - The payer tab will display the payer related filters such as Payer Type, Insurance Type, Custom filter, Other Insurance Type and Additional filters. The Payer Type and Other Insurance Type are newly introduced filters in the Patient List screen. The user can filter patients based on the payer details.

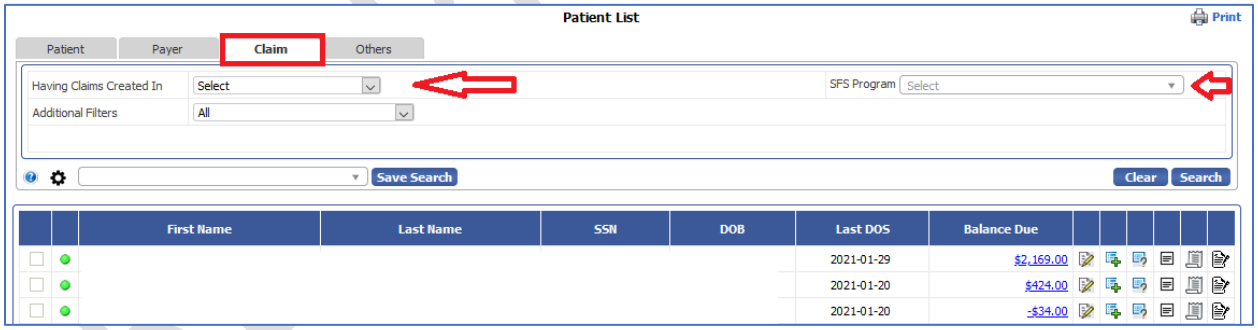


a) Payer Type – The Payer Type filter will display a list of payers. The user can select the multiple payers to fetch patients based on the Payers chosen. Additionally, we have added a new option "Not Configured" in the Payer Type filter.

b) Other Insurance Type – The Other Insurance Type filter will display options such as All, Primary, Secondary and Tertiary. The user can select the Other Insurance Type option to fetch patients based on the Other Insurance Type option chosen.

c) Additional Filters – A new filter "Pending Insurance Payment" is added in the Additional Filters drop down with the existing Insurance Payment additional filters.

3) **Claim Tab** - The claim tab will display the claim related filters such as Having Claims created In, Additional Filters and SFS Program. The Having Claims Created In filter is newly introduced in the Patient List screen. The user can filter patients based on the claim details.

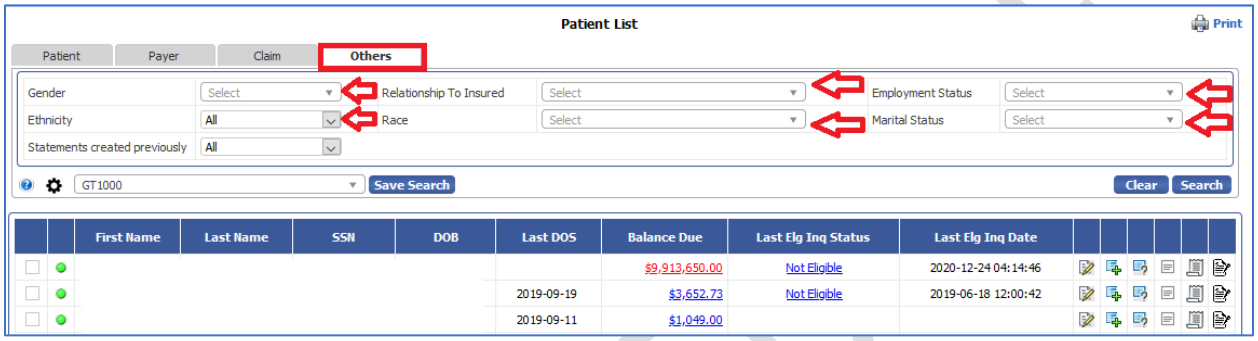


a) Having Claims Created In - The Having Claims created In filter will have five options: Current Month, Custom Month, Current Month + Last Month, Current Month + Last two Months and Date Range. The user can select the date criteria to fetch patients based on the claims created date.

b) Additional Filters – Two new filters "Having Contracted Payer Claims" and "Having Only Contracted Payer Claims" is added in the Additional Filters drop down with the existing claim additional filters. This filter is based on the claim payer id "CONTRACT"

c) SFS Program (Only PHD accounts) - The SFS Program filter will display the list of SFS Programs. The user can select the multiple SFS Programs to fetch patients based on the SFS Program. By default, the All option will be chosen.

4) **Others Tab** - The Others tab will display filters such as Gender, Relationship to insured, Ethnicity, Race, Marital Status, Employment Status, and Statements Created Previously. The Marital Status, Employment Status, Ethnicity, Race, Relationship to insured and Gender are newly introduced filters in the Patient List screen. The user can filter patients based on these details.



d) Marital Status – The Marital Status filter will display a list of statuses. The user can select the multiple statues to fetch patients based on the options chosen.

e) Employment Status - The Employment Status filter will display a list of statuses. The user can select the multiple statues to fetch patients based on the options chosen.

f) Ethnicity - The Ethnicity filter will display options such as All, Hispanic or Latino and Not Hispanic or Latino. The user can select option to fetch patients based on ethnicity.

g) Race - The Race filter will display a list of races. The user can select the multiple options to fetch patients based on the race.

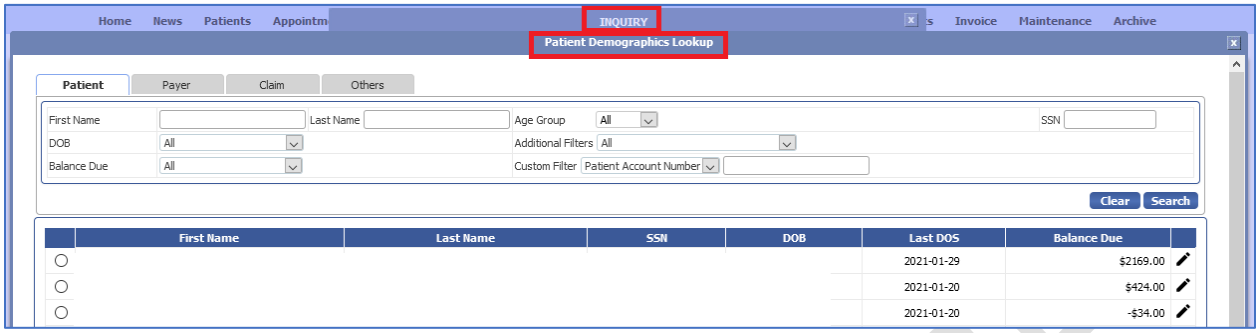
h) Relationship to be Insured - The Relationship to be Insured filter will display a list of statuses. The user can select the multiple statues to fetch patients based on the options chosen.

i) Gender - The Gender filter will display options such as All, M, F and Other. The user can select the multiple options to fetch patients based on the gender chosen.

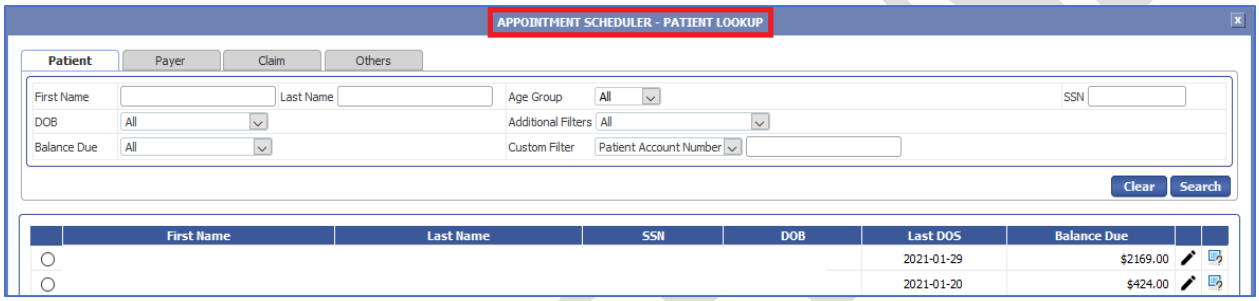
The Patient view list enhancement using tabs is implemented in the Patient Demographics look up from the "Eligibility Inquiry screen" and "Appointment Lookup screen" as well.

Note: The Saved Search criteria is not available in the Patient Demographics look up screens.

Eligibility Inquiry



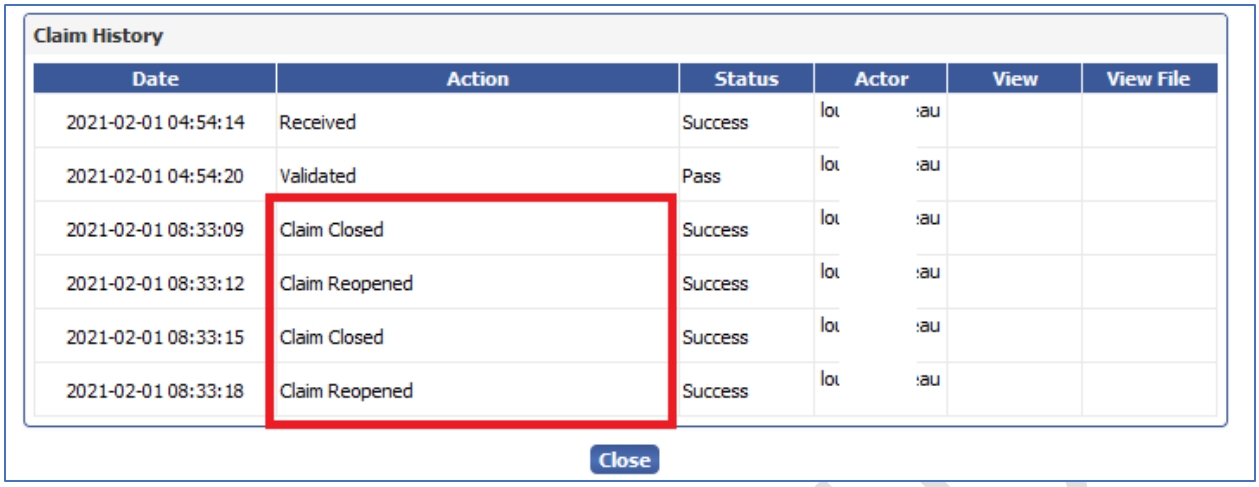
Appointments



2) [Ticket # 12886] iTech: Claim Closed/Claim Reopened event in Claim History

There was a request for a new event to be displayed in the Claim History screen. Previously, we were not displaying the Claim closed and Claim Re-opened event in the claim history screen. This version has enhanced the claim history screen with two events - “Claim closed” and “Claim Re-opened”. This can be viewed from practice module, admin module and the manager module. When a claim is closed/opened, the claim closed/reopened event together with the user who performed the action will be saved and will be available in the Claim History screen of both the primary and secondary claim. A claim can be closed and reopened from the following screens -

1) Claim Ledger
2) Posting Batch – Claim List
3) Archive - Claim Closure
4) Denial Search



Claim History

Date	Action	Status	Actor	View	View File
2021-02-01 04:54:14	Received	Success	lou au		
2021-02-01 04:54:20	Validated	Pass	lou au		
2021-02-01 08:33:09	Claim Closed	Success	lou au		
2021-02-01 08:33:12	Claim Reopened	Success	lou au		
2021-02-01 08:33:15	Claim Closed	Success	lou au		
2021-02-01 08:33:18	Claim Reopened	Success	lou au		

Close

3) [Ticket # 12908] iTech: New Dashlets | Claim Status Inquiry - User wise and Payer wise

We have introduced two new dash lets - **Claim Status Inquiry Summary (Payer Wise)**" and "**Claim Status Inquiry Summary (User wise)**" for the Claim Status Inquiry feature. A description of what was done as part of this ticket is available in the CSI User Manual. This documentation on these dashlets shall be provided to users on request.

4) [Ticket # 12936] PH: PPA Template - Amount Format Issue Fix

One of the clients had reported an issue with the Amount format in the PPA Template. It was noticed that when a PPA template was created for any amount and the amount format in the View Agreement, View/Edit Agreement details and print agreement was displayed with a zero after the decimal point. For example, $90.00 was displayed as $90.0 This issue was happening because the program was skipping the last zero after the decimal point. However, the system did not skip the (non-zero) two-digit number after the decimal point. In this version, we have fixed the amount format issue with zeros after the decimal point. Now the agreement amounts with and without zero will be displayed after the decimal point. For example, 90.00, 90.10, 90.01 and 90.99. This issue is fixed in the following screens of the PPA menu.

1) View PPA Agreement.
2) Print PPA Agreement.
3) View/ Edit Agreement Details screen.

5) [Ticket # 12948] PH: Contracted Invoice Report - Design Improvement | Database persistence + Enhanced Search

One of the clients requested a new feature in the View Contracted Invoice Report screen. The clinic wants to search claims based on the Invoice Number. The product already had an option to search Invoice by specifying the keyword in the "Search files using keywords" filter in the View Reports – Claim Contracted Invoice Reports. However, the clinic could not accurately search for a particular invoice due

to the Invoice ID not being saved in the database and for reason that the earlier search was a string search across the HTML files.

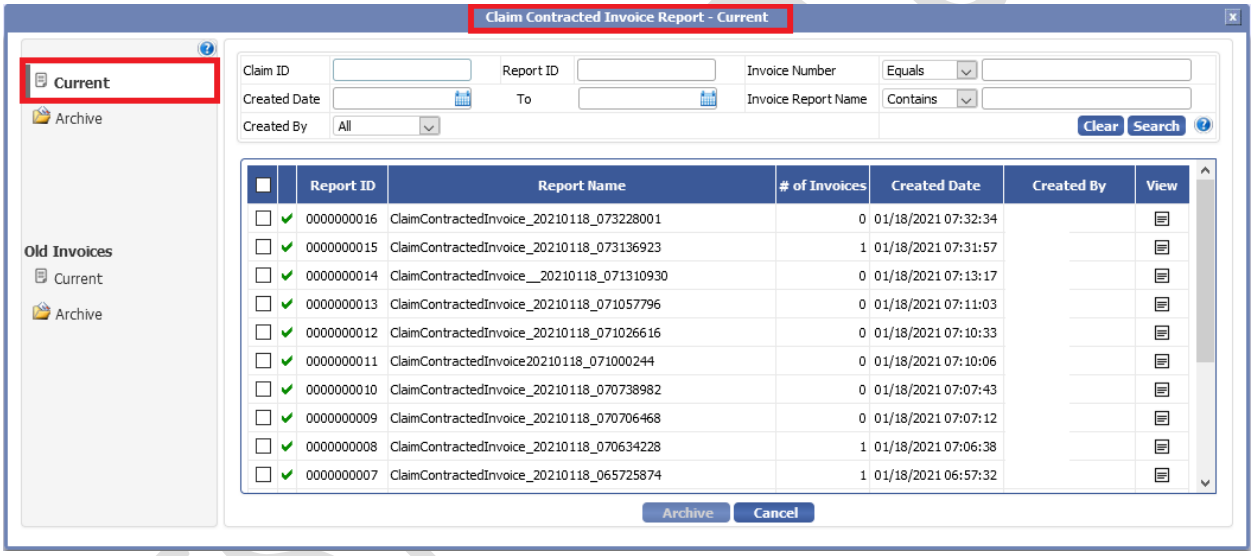
This version introduces the advanced search filters to search the Invoice Report based on the Invoice Number by enhancing the View Reports screen – Claim Contracted Invoice Report – Current and Archive. Now, when an invoice report is generated, the invoice number associated with the claim will be saved in the database and used as an index when searching.

The Claim Contracted Invoice Report screen will display two folders – Current and Archive. The invoices can now be created, viewed, and downloaded from this new section with the advanced search filters.

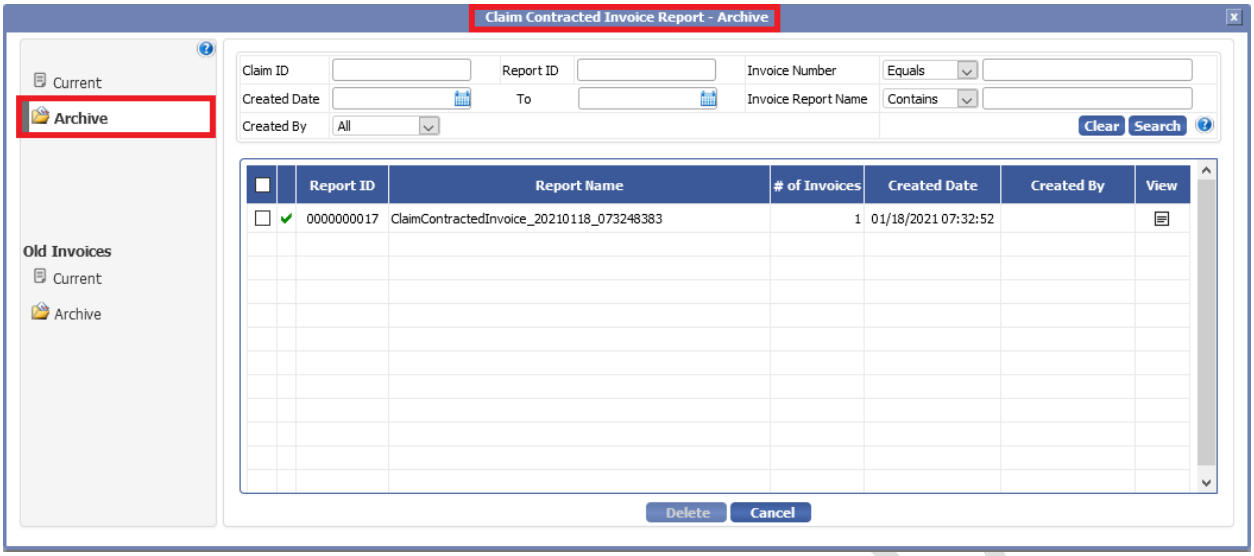
Please note these enhancements have been done to improve the handling of Contract Payer claims – whether it is from the Contract Payer invoicing screen or Posting of Contracted payer claims or when searching for Contracted Payer claims.

Below is the new claim contracted invoice report.

Claim Contracted Invoice Report – Current



Claim Contracted Invoice Report – Archive



The Claim Contracted Invoice Report – Current & Archive will display filters such as **Claim ID, Report ID, Invoice Number, Created Date, To, Invoice Report Name** and **Created By** with the **Clear** and **Search** option. The user must specify the filter criteria and click on "search" button to filter the Invoice Reports. The user can click on "Clear" button to clear the filters to default values. By default, all reports will be shown.

Claim ID – The user must specify 10-digit Claim ID.

Report ID - The user must specify 10-digit Report ID.

Invoice Number – The invoice number will have sub filters such as Equals, Starts With, Contains and Ends With. The user must specify the invoice number in the text field by selecting the sub filter.

Created Date - The user must specify the Invoice created From and to date to fetch the Invoice Report.

Invoice Report Name - The invoice report name will have sub filters such as Equals, Starts With, Contains and Ends With. The user must specify the invoice name in the text field by selecting the sub filter.

Created By – The Created By filter will have three options such as All, Account User and Operator List. The user can select either of the option from the drop down. By default, the All option will be selected.

The Claim Contracted Invoice Report – Current & Archive will display columns such as **Report ID, Report Name, # of Invoices, Created Date, Created By** and **View**.

Report ID - This column will display the 10-digit report ID.

Report Name – This column will display the Name of the Claim Contracted Invoice Report.

# of Invoices – This column will display the no of invoices created for a claim.

Created Date - This column will display the Created Date and Time for the Claim Contracted Invoice Report.

Created By - This column will display the account user/operator's name who created the Claim Contracted Invoice Report.

View – This column will display the view option to view and print Invoice report.

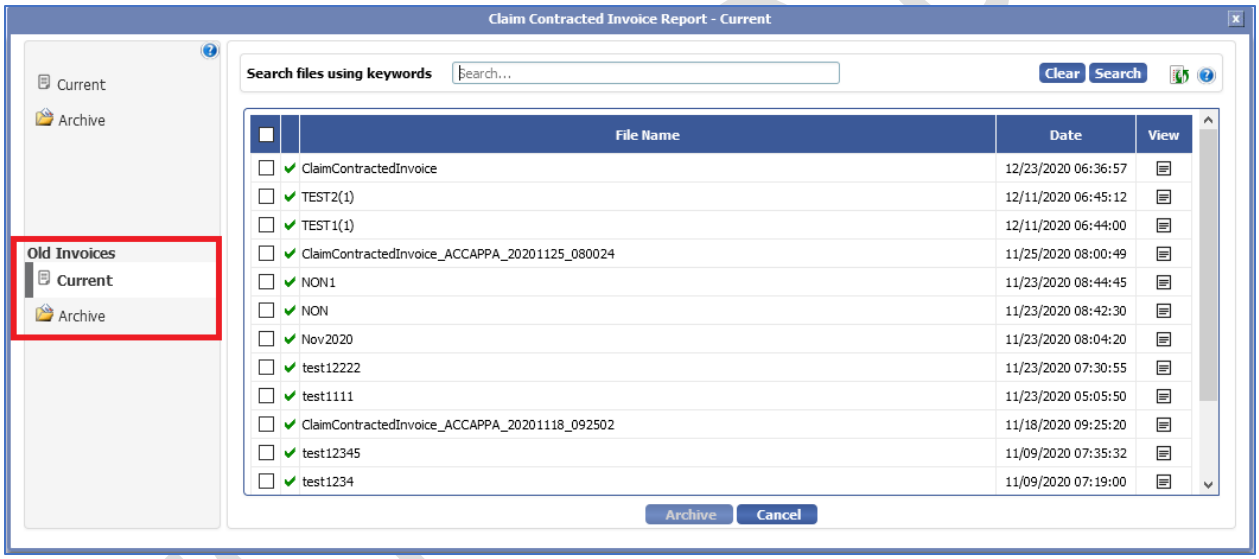
The user can select the new section's reports in the current tab and move them to archive by clicking on the Archive button. The selected reports will be moved to the Archive tab.

The reports that are created and moved from the current tab will appear under Archive tab.

The user can delete the selected reports from the archive tab, by clicking on the Delete button.

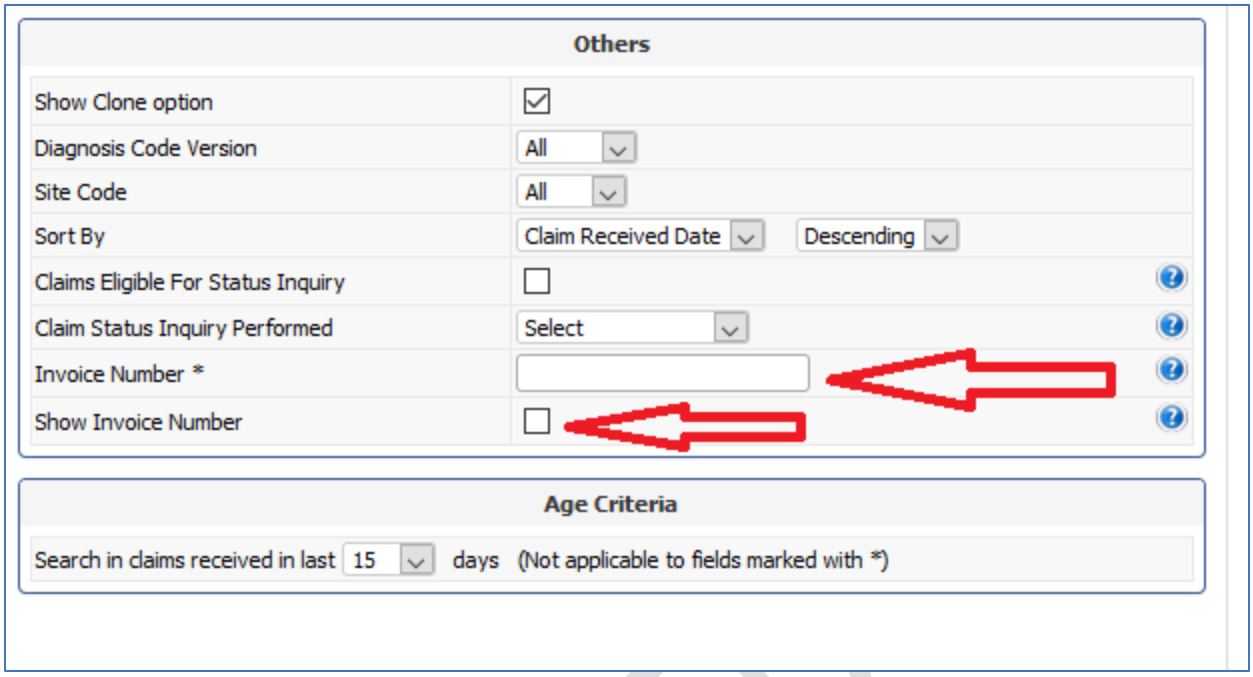
Old Invoices

The invoices created in the earlier versions (before v5.7) were not persisted in the database and were saved only as files with basic file content search. For backward compatibility, these invoices can be now viewed from the section "Old Invoices". Please note that the above new feature is available only on new invoices that are created from v5.7 onwards.



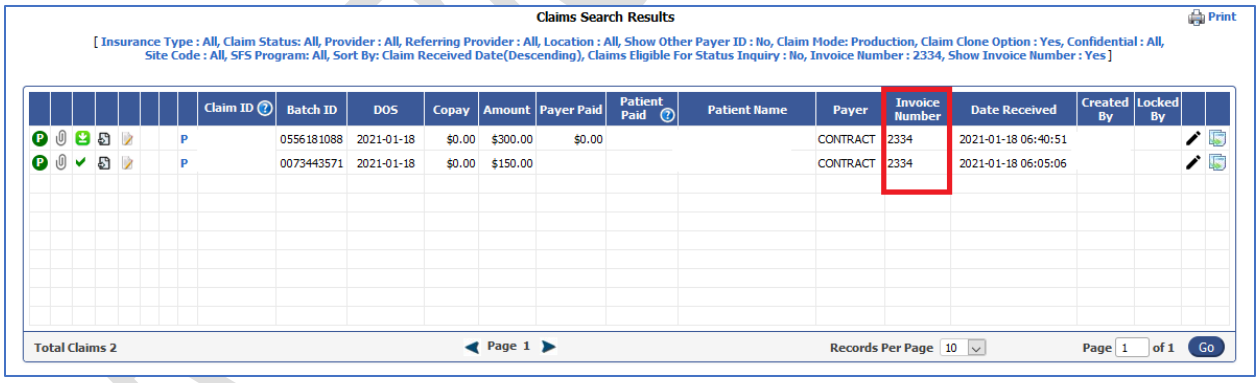
Search Claims

We have introduced new filters "Invoice Number" and "Show Invoice Number" in the search claims screens - New & Legacy.



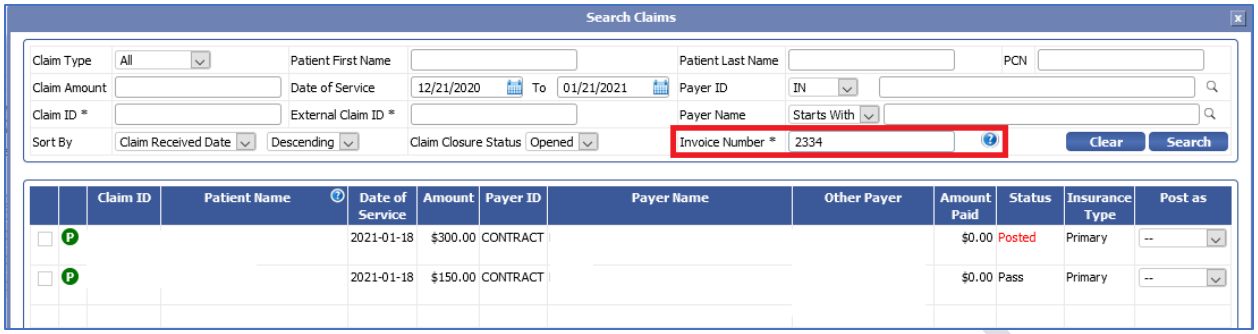
Invoice Number – The user can specify the invoice number to search the claims in a particular invoice. This is applicable for the claims for Contracted Payers.

Show Invoice Number – When the user enables the "Show Invoice Number" check box, a new column "Invoice Number" will appear in the Claim Search Results screen. When this option is enabled the list of invoice numbers in which each claim is billed to the contracted payer will appear under the Invoice number column. By default, this option will be unchecked.



Posting

In the posting module **Add claims** search screen, we have introduced a new filter "Invoice Number". This is available under Posting >> Manual Batch >> Add Claims to batch screen. The user must specify the invoice number to search the claims in that invoice. This is applicable for the claims for Contracted Payers.



Configuration

We have made the following changes in the eCP Properties file of the Claim Contracted Invoice Report having the New and Old invoices.

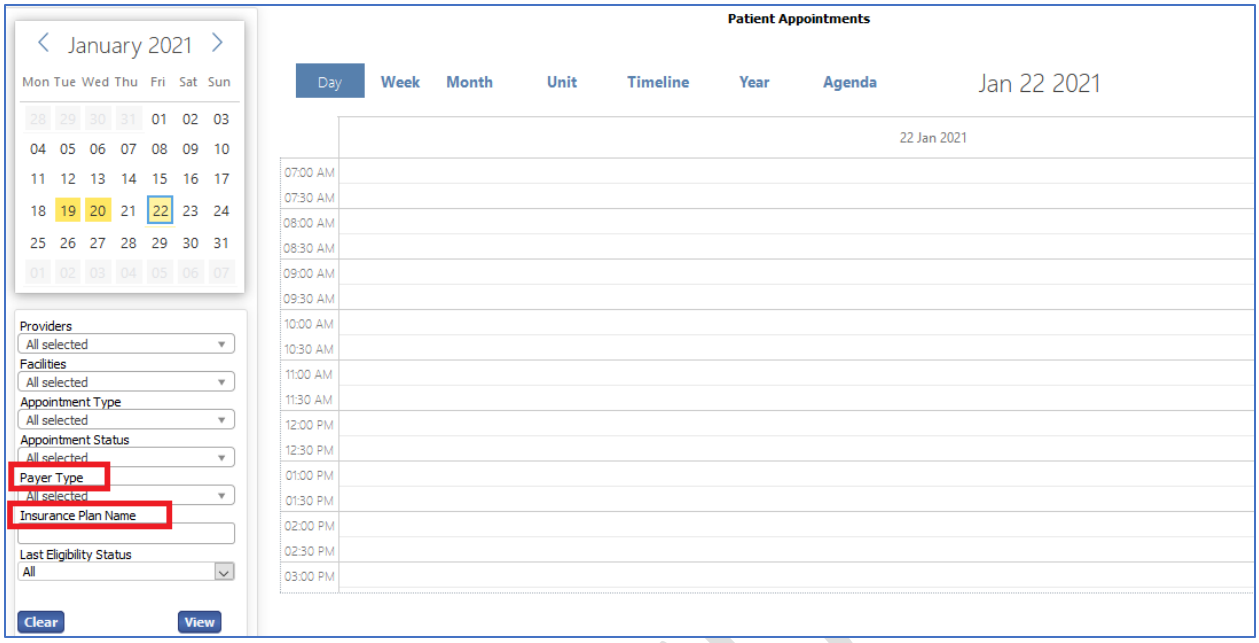
```
## THIS DIRECTORY IS OBSOLETE NOW. BUT WILL BE USED TO SHOW THE OLD INVOICES ON SCREEN
eCP.user.reports.ContractClaimsInvoice.legacy.dir=ContractClaimsInvoice


##NEW DIRECTORY FOR CONTRACTED CLAIMS INVOICE WHERE INFO IS PERSISTED.
eCP.user.reports.claim.contracted.invoice.dir=ContractedClaimsInvoice
```

6) [Ticket # 12949] MDR: Appointment Scheduler - Search Enhancement

There was a request for a feature enhancement in the Patient Appointments screen - to add new options to filter the scheduled Patient Appointments based on Payer Type and Insurance Plan Name. Hence, we have introduced the two new filters **Payer Type** and **Insurance Plan Name** in the Patient Appointments screen.

These filters are introduced in all the appointment view screens like Day, Week, Month, Unit, Timeline, Year and Agenda.



Payer Type – The Payer Type filter will display a list of payers configured for the practice account. This filter has multi-select option where the user can select one or more payer to filter the patient appointments. By default, ALL option will be selected in the Payer Type filter.

Insurance Plan Name – The Insurance Plan Name filter is a text field where the user can enter the insurance plan's name to filter patient appointments based on the insurance plan name. The Insurance Plan Name filter will implicitly filter patient appointments with equals and contains value entered in the text box.

Print Configuration - We have added a new option "Payer Type" in the appointment settings screen to display the Payer Type column in the Appointment Print screen. The user can add/remove the "Payer Type" option by moving it from the available column to the selected column.

Once the "Payer Type" option is moved to the selected column and is saved in the Appointment Print Configuration settings, the "Payer Type" column will appear in the Patient Appointments print screen.

7) [Ticket # 12982] (Hot Patch=v5.6.1) iTech: Redesign of Claim Status Inquiry Search Panel

We have redesigned the Claim Status Inquiry Search Panel. A description of what was done as part of this ticket is available in the CSI User Manual. This document shall be provided on request. A hot patch was deployed on our production servers as v5.6.1 release for this enhancement.

8) [Ticket # 12983] (Hot Patch=v5.6.1) iTech: Re-categorizing the Custom Inquiry Status Codes & Issue fix on inquiry showing as Created even after response is received

We have recategorized the Claim Inquiry Status code and fixed issues on the response received. A description of what was done as part of this ticket is available in the CSI User Manual. This document shall be provided on request. A hot patch was deployed on our production servers as v5.6.1 release for this enhancement.

9) [Ticket # 12991] (Hot Patch=v5.6.1) PH: Master Claim Report - Issue with Pending charges calculation

Previously, in v5.6 release [Ticket #12902] PH: Master Claim Report | Inclusion of Patient Paid Amount in Total Paid we had implemented a new logic to display the "Total Paid Amount" and "Total % Paid" in the master claim detail report. This issue was only fixed for the Total Paid amount column and Total % paid column and not the Pending Claim Charges column. However, the pending claim charges column was displaying incorrect amount. In this version, we have changed the logic to calculate the Pending Claim charges only if the claims are in accepted and completed status else the pending charges will be always zero. The Pending Claim Charges will be calculated based on the logic (Pending charges = Total charges - Patient Paid amount).

A hot patch was deployed on our production servers as v5.6.1 release with the above fix.

10) [Ticket # 13003] iTech: Admin Feature Enhancements - Search ERA Files & Search Check/EFT screens

This version has introduced new filters and enhanced the existing filters in the "Search ERA Files" screen in the admin module and "Search Check/EFT" screen in the user and Admin module. The "Search ERA Files" screen in the admin module is available under **Claim Response >> Posting >> ERA File View**. The "Search Check/EFT" screen in the admin module is available under **Claim Response >> Posting >> Check/EFT.**

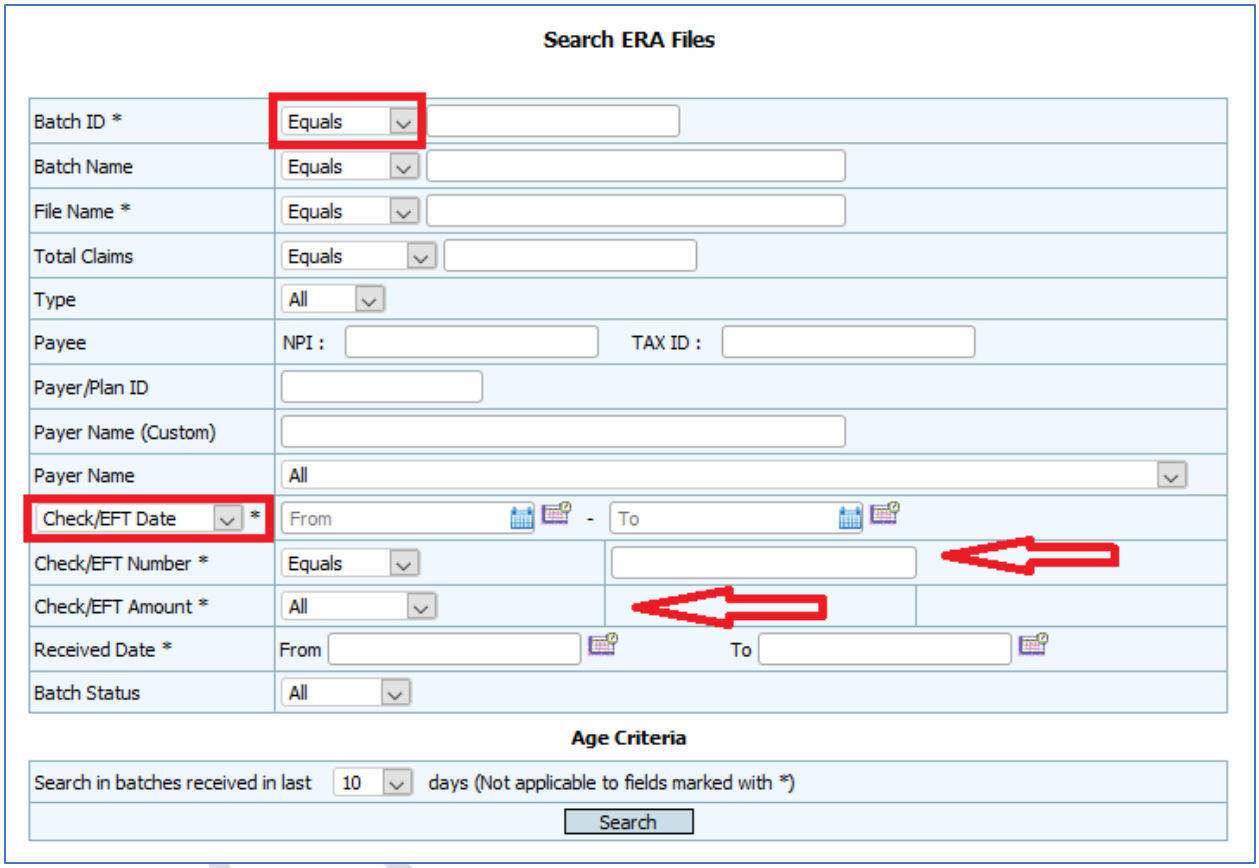
The following enhancements are implemented in the "Search ERA Files" screen.

Check EFT Number – This filter will have sub options such as Equals, Starts With, Contains and Ends With and a text field where the admin can enter the value and search for files based on check EFT number. By default, the equals option will be chosen in the sub filter.

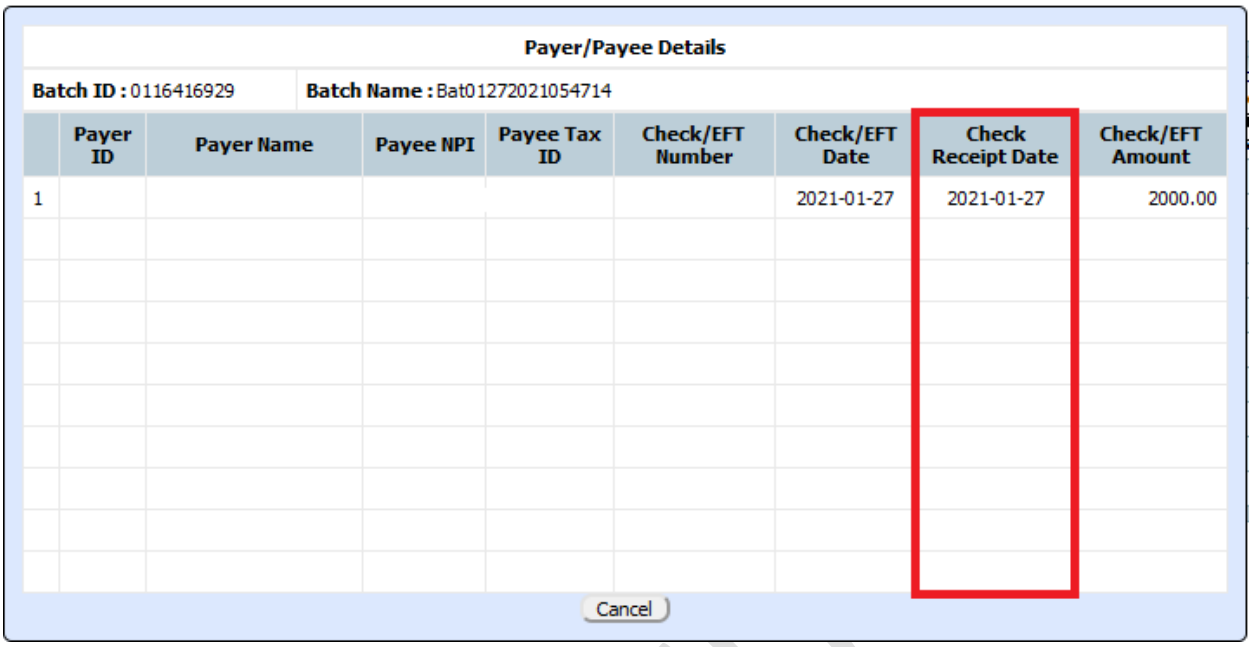
Check EFT Amount - This filter will have sub options such as All, Equals, Less Than, Greater Than and Between with a text field where the admin can enter the value and search files based on check EFT amount. By default, the ALL option will be chosen in the sub filter.

Batch ID – Previously, the Batch ID filter had only the text field where the admin can enter the Batch ID to search for ERA files. This version has enhanced the Batch ID filter with sub filter options such as Equals, Starts With, Contains and Ends With. By default, the Equals option will be chosen.

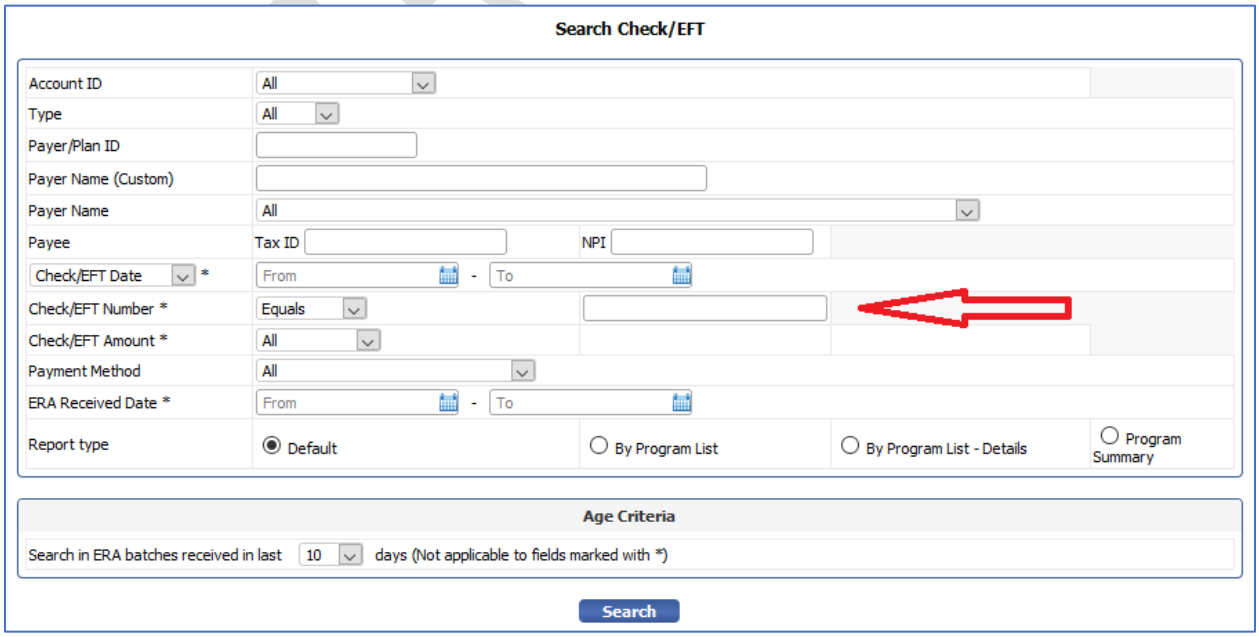
Date – A new drop-down option is introduced in the date filter. This filter will have two options such as Check/EFT Date and Check Receipt Date. By default, the Check EFT Date will be chosen in the date filter with the From and To date calendar filter.



We have also introduced a new column "Check Receipt Date" beside the Check/EFT column in the Payer/Payee Details screen. This is available under ERA/835 Files List >> Payer/Payee column >> Click on "List".



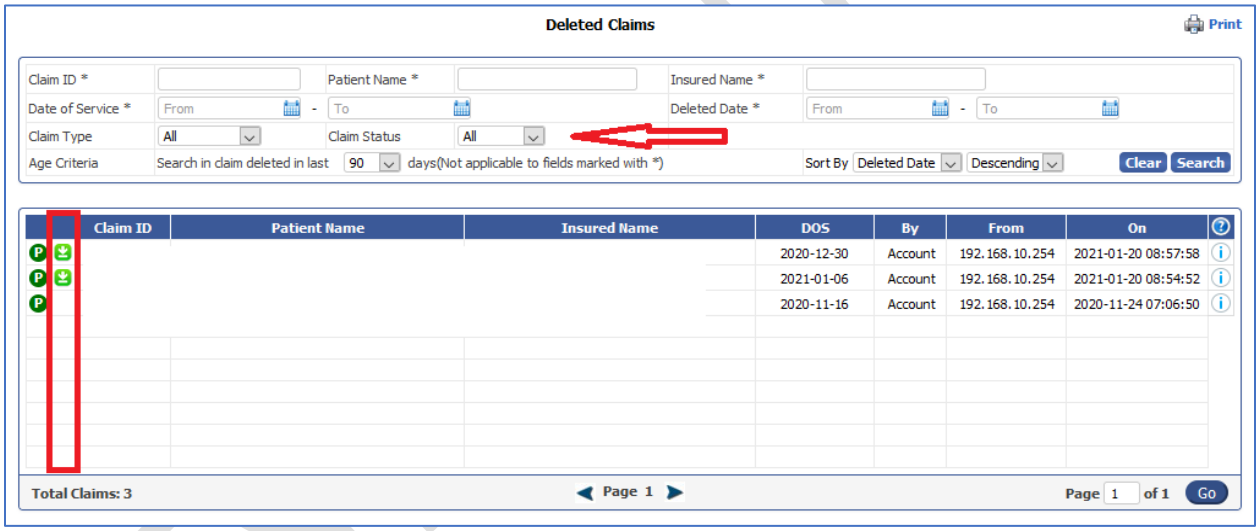
We have enhanced the **Check / EFT Number** filter in the Search Check/EFT screen in both User and Admin Module. This filter will have sub options such as Equals, Starts With, Contains and Ends With and a text field where the user/admin can enter the value and search for check based on check or EFT number. By default, the equals option will be chosen in the sub filter. We have seen check numbers coming with leading zeroes, for instance, 0001234. So, when users try with a check number of 1234 in the earlier version of expEDIum, as it would do an exact match, it would not find a check that had come in with leading zeroes (i.e., 0001234). This was a pain point not just for the users but for support personnel too.

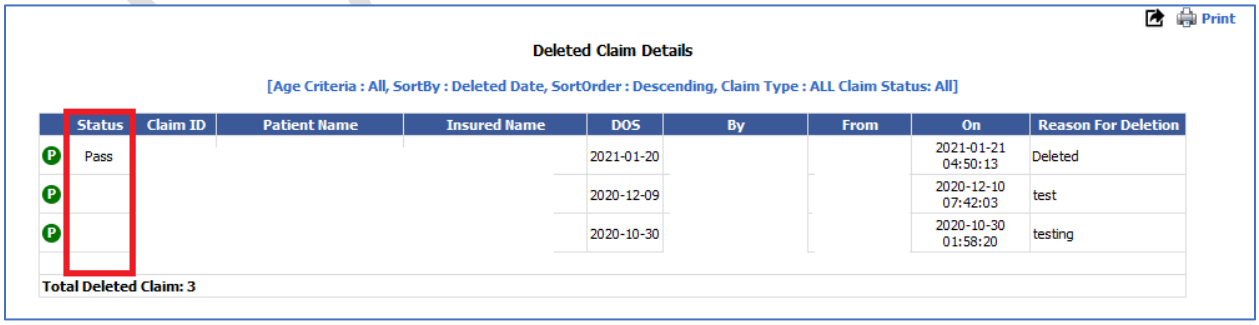


11) [Ticket # 13005] iTech: Deleted Claims - Claim Status to be saved on claim deletion + Filter

There was a request for a new feature in the Deleted Claims screen. Previously, our system did not have an option to display the status of deleted claims. In this version, we have introduced a new column to display the status of the claim while it was being deleted. The claim status such as Pass, Pass (Submitted for review), Error, Error (Submitted for review), Accepted, Completed, Unpaid, Rejected, Posted and Validated will be shown in the claim status column. The deleted claim status column will also appear in the print deleted claim details screen. Also, we have added a new filter "Claim Status" in the Deleted Claims search screen. The Claim Status filter will display statuses such as All, Pass, Error, Sent, Accepted, Rejected, Unpaid, and Posted. By default, the All option will be selected in the claim status filter.

In the accounts where Claim Review option is turned on, the claim status icon will be shown with R as superscript if the claim is deleted when it is waiting for review and approval. The claim review flag of the claim is also saved on claim deletion, so that the claim status icon in this module reflects that.





12) [Ticket # 13022] (Hot Patch=v5.6.1) PH: Practice Analysis by Procedure Report - Fix for Payment Posted Date filter

One of the clients had reported an issue in the "Search Practice Analysis By Procedures" report with the procedure code filter for a particular date range. It was noticed that, when the clinic entered a particular date range in the "Payment Posted Date" filter the report did not return any result no matter what procedure code or date range was chosen. However, the clinic could run and get the report when there were no Payment Posted Date criteria chosen. This was caused by a software hitch and is now fixed. The clinic can now fetch the result for the chosen date range in the "Payment Posted Date" filter.

A hot patch was deployed on our production servers as v5.6.1 release with the above fix.

13) [Ticket # 13068] iTech: Claim Status Inquiry – Enhancements

The Claim Status Inquiry feature was introduced in v5.5 release. In this version, we have enhanced the claim status inquiry response screen. A description of what was done as part of this ticket is available in the CSI User Manual and will be provided on request.

14) [Ticket # 13092] MB: Carry Forward PAN/PCN from the original claim when cloned

In our previous v5.6 release, [Ticket #12896] MB: Cloning - Not to carry forward Patient System ID and PCN/PAN from original claim - we had changed the logic for cloned claim – to NOT carry forward the Patient system ID and PCN/PAN from the original claim for a new patient as the claim submission ledger entries were misaligned. Some clinics that were using cloning feature had requested us to remove the PAN/PCN from the original claim when cloned.

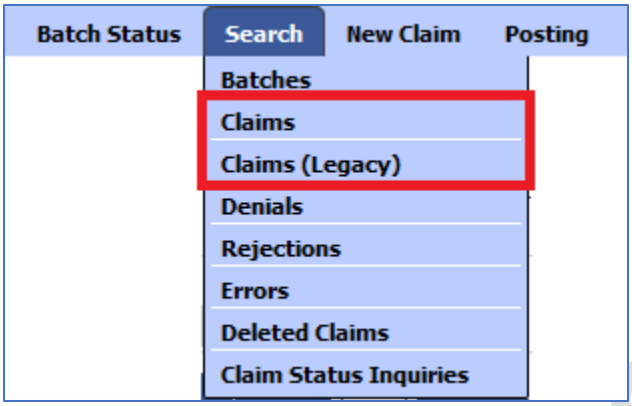
However, this was causing hindrance in the workflow for several other clinics that were using cloning which expects the PCN/PAN to carry forward. This version has fixed the existing logic by allowing the user to carry forward the PAN/PCN from the original claim when cloned. Now when a new claim is created from the claim clone option, the PAN/PCN will be retained from the original claim. This is fixed in both Professional and Institutional claims.

15) [Ticket # 13109] PH: Claim Search menu - Label change

Previously, the old claims search screen was labeled as "Claims" and the new claims search screen was labeled as "Claims (New)". However, the users were habituated to use the old claims search screen labeled as "Claims" under the search menu. In this version, we have renamed the menu label of the search claims screen as shown below.

The New Search Claim Page "Claims (New)" is renamed as **Claims** and the Old Search Claim Page "Claims" is renamed as "**Claims (Legacy)**". This change is implemented in both PHD and Non PHD accounts. With this change, we expect more users to start using the new claims search feature.

Please note we are looking to deprecate the Claims (Legacy) option soon.

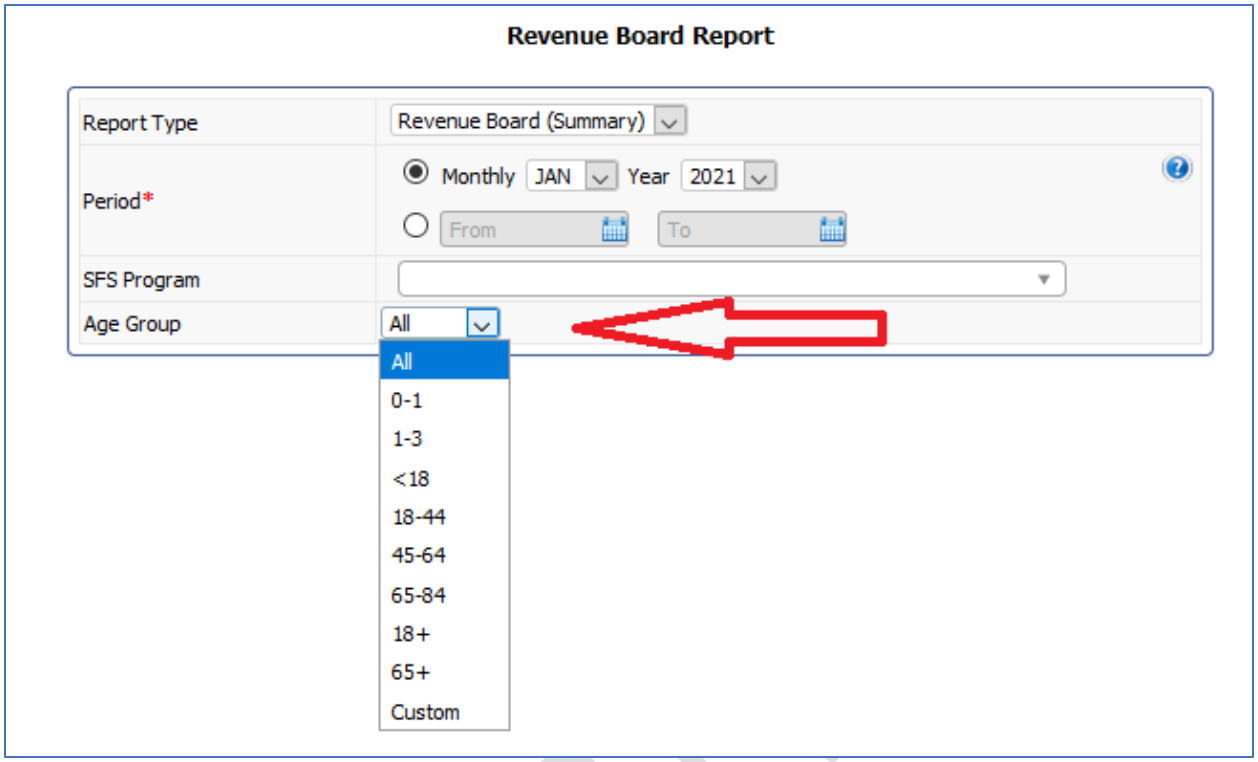


16) [Ticket # 13130] MDR2: Issue-Deleted Appointments History is not displayed on user trail

One of the clients had reported an issue with the Deleted Appointments History not being displayed in the User Trial screen. When a scheduled appointment was deleted and when the user tried to search for deleted appointments by enabling the "Search Deleted Appointments" check box in the User Trial screen, the user was not able to view the deleted appointment history. However, the screen was displaying the total count of the deleted appointments. This issue was caused by a glitch in the query used – it is fixed, and the deleted appointments are appearing on the User Trial screen.

17) [Ticket # 13164] PH: Age Group Filter in Revenue Board Report - Revised age range

As the age filter was cluttered with too many choices, in this version we have revised the age group options in the age group filter. The Age Group filter will have the following options as shown below in v5.7 onwards.



Age Group Option	Notes
All	
0-1	
1-3	Toddler age
<18	0 - 17 Y 365 D | Minor/Underage
18-44	Inclusive both
45-64	Inclusive both
65-84	Inclusive both
18+	Above 18 years of age
65+	Above 65 years of age
Custom filter	User can define any age group

Note: The age group filter will work as before with the age range options as we have changed only the UI select option.

Bugzilla List of tickets

#	ID	Client	Ext. Ticket #	Summary	Version
1	12687	iTech	Internal	iTech: Patient List Screen - Search Enhancement	V5.7
2	12886	iTech	Internal	iTech: Claim Closed/Claim Reopened event in Claim History	V5.7
3	12908	iTech	Internal	iTech: New Dash lets | Claim Status Inquiry - User wise and Payer wise	V5.7
4	12936	PH	895568/12758	PH: PPA Template - Amount Format Issue Fix	V5.7
5	12948	PH	895708	PH: Contracted Invoice Report - Design Improvement | Database persistence + Enhanced Search	V5.7
6	12949	MDR	via email	MDR: Appointment Scheduler - Search Enhancement	V5.7
7	12982	iTech	Internal	(Hot Patch=v5.6.1) iTech: Redesign of Claim Status Inquiry Search Panel	V5.6.1
8	12983	iTech	Internal	(Hot Patch=v5.6.1) iTech: Re-categorizing the Custom Inquiry Status Codes & Issue fix on inquiry showing as Created even after response is received	V5.6.1
9	12991	PH	895870	(Hot Patch=v5.6.1) PH: Master Claim Report - Issue with Pending charges calculation	V5.6.1
10	13003	iTech	Internal	iTech: Admin Feature Enhancements - Search ERA Files & Search Check/EFT screens	V5.7
11	13005	iTech	Internal	iTech: Deleted Claims - Claim Status to be saved on claim deletion + Filter	V5.7
12	13022	PH	896628	(Hot Patch=v5.6.1) PH: Practice Analysis by Procedure Report - Fix for Payment Posted Date filter	V5.6.1
13	13068	iTech	Internal	iTech: Claim Status Inquiry - Enhancements	V5.7
14	13092	MB	via email	MB: Carry Forward PAN/PCN from the original claim when cloned	V5.7
15	13109	PH	-	PH: Claim Search menu - Label change	V5.7
16	13130	MDR2	Via email	MDR2: Issue-Deleted Appointments History is not displayed on user trail	V5.7
17	13164	PH	890206	PH: Age Group Filter in Revenue Board Report - Revised age range	V5.7

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