

Release 14.7.0 - April 22, 2024

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New Features and Updates

General

Dashboards

- **Update to the Lag Time Gadget's Averages Displayed Terminology:** We updated the terminology of the averages displayed at the bottom of the Lag Time Gadget to better align with what most providers are seeking. To enhance their understanding, we renamed the "Total Average Lag" metric to "**Average Time to Payment**," which indicates the average lag time from when the charge occurred to when it was paid. Additionally, we changed "Billing Lag" to "**Charge Capture Lag**," reflecting the average time from when the charge occurred to when it was billed to insurance, and introduced a new benchmark:
 - Above Average: 1 day
 - Average: 2 days
 - Below Average: 3 or more days

Tasks

- **Update to Show The User Who Assigned a Task:** We updated the Tasks section and added the ability to display the person who assigned a task, rather than just the creator of the task. This allows users to reassign tasks to the assigner if clarification is needed. Please visit our [Help Article](#) for more information on adding or editing a task.

Reports

- **New "Between" Filter Option for Text Fields on Reports:** When filtering a report by names, users may need to split the report based on a range of the first letters of the names. To aid in this, a new "Between" option has been added to all report text filters, allowing users to filter names by a range of first/last name letters (e.g., A-G, H-N, etc.), facilitating better task assignment. Visit our [Help Article](#) for more information on adding report filters.

Patient

- **New Ability To Save Credit Card Information:** We previously allowed patients to securely store their credit card information as a payment profile within the payment portal by selecting the option to "Save my payment information for next time." However, this convenient feature was not accessible within the application until now.

With cardholder consent, payment (Credit Card) information can be saved for future payments. Users

can now save payment (credit card) information when processing patient payments, allowing them the convenience of managing saved cards directly within CollaborateMD by checking the new “save my payment information for next time” box. Users will also be able to save and manage payment information directly from the patient section.

This enhancement aims to streamline the payment process and offer users greater control and flexibility in managing their payment methods. Please visit our [Help Article](#) for more information on saving payment information.

RA

- **New Option To Allow Users To Filter ERAs By Specific Error/Warning/Message:** We updated the ERA results screen to include multi-select dropdowns in place of the existing Errors, Warnings, and Information checkboxes. These dropdowns allow users to filter by specific errors, warnings, or information messages present in the report. Each dropdown only contains a list of issues that are four in the current report.
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