

Release 14.8.0 - May 6, 2024

† Modified on 05/30/2024 10:55 am EDT

New Features and Updates

General

Dashboards

- **New Productivity Reporting:** Added a new Dashboard Gadget and 3 new reports to provide our customers with the ability to report on the productivity of their users:
 - **Dashboard Gadget: Average Touches to Completion** - A new dashboard gadget will display the average number of times a completed claim with a balance of \$0.00 was worked, based on either the claim notes or follow-up notes. The new gadget will be visible to Management users on the Welcome screen.
 - **Report: User Productivity by Notes** - A new report that shows the number of Notes (claim notes and claim follow-up notes) that have been created by each user during the specified time frame.
 - **Report: User Productivity by Tasks Assigned** - A new report that shows the number of tasks assigned by a user during a specific time frame.
 - **Report: User Productivity by Tasks Completed** - A new report that shows the number of tasks completed by a user during a specific time frame.

Patient

- **New Columns Within the "Recently Opened List":** Added three new columns to the "Recently Opened" list within the Patient, Manage Account, and Claim screens. The newly available columns are Facility, Provider (already available in the Claim section), and Primary Insurance (Payer Name). These new columns will be hidden by default.

Codes

- **Update to the "All Inclusive" Option for Procedure Codes:** Updated the Procedure Codes to allow setting "All Inclusive" codes that send other charges as \$0.00 or \$0.01. When the option "This is an all inclusive code" is selected in the Procedure Codes section, the system now displays a dropdown box with new options. Upon selection, the Claim section will set all other charge amounts to \$0.00/\$0.01, making the amount field non-editable.

Intake Forms

- **Ability To Reorder Intake Forms:** A new column with a drag handle has been added under Services > Intake Forms, enabling users to reorder the forms and determine their sequence (order) as they appear.

to patients within the forms portal.

- **New Timeline Item for Unapplied forms:** Added a new Timeline item titled "Forms Ready to be Applied," which displays the number of non-deleted appointments from the past seven days (including today) where patients have submitted intake forms that have not yet been applied.
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