

# Release 14.17.0 - September 9, 2024

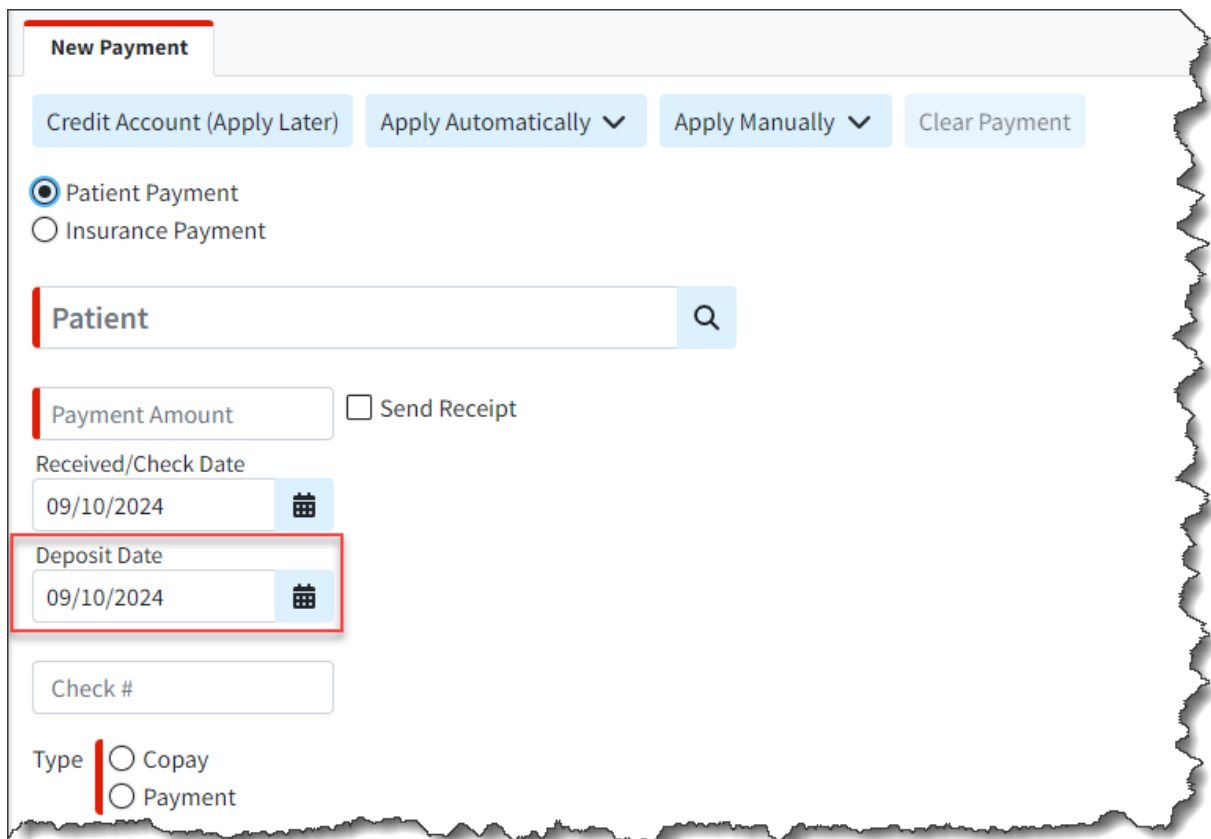
Modified on 09/10/2024 12:46 pm EDT

## New Features and Updates

### General

#### Payment

- **New Deposit Date Field on Payments:** We added a new "Deposit Date" field when entering or editing payments (ERA, EOB, or Patient Payment) to represent the date the check was deposited into the practice's/provider's account. This field will mirror the "Check Date" by default (for EFTs, it is typically the same as the check date) but can be manually changed if there are delays in ACH processing. This will help users who want to reflect any delays and match them with their bank statements.



The screenshot shows the 'New Payment' form interface. At the top, there are buttons for 'Credit Account (Apply Later)', 'Apply Automatically', 'Apply Manually', and 'Clear Payment'. Below these are radio buttons for 'Patient Payment' (selected) and 'Insurance Payment'. A search bar labeled 'Patient' is present. The 'Payment Amount' field is followed by a 'Send Receipt' checkbox. The 'Received/Check Date' field is set to '09/10/2024'. The 'Deposit Date' field, which is highlighted with a red box, is also set to '09/10/2024'. Below this is a 'Check #' field. At the bottom, there are radio buttons for 'Type' with options 'Copay' and 'Payment'.

For more information on updating the deposit date, please visit our [Post Insurance Payments Help Articles](#).

#### Patient

- **New Option to Select Resulting Claim Status When Writing Off Charges:** A new option has been added within **Patient > A/R Control**, allowing users to select the resulting claim status when writing off claims. The Write Off Remaining Balance dialog now includes an additional option for Claim Status,

enabling users to choose any claim status, including custom ones.

**Write Off Remaining Balance**

Apply on Charges ▾

Adjustment Code 🔍

Memoline

AR CONTROL BATCH PROCESSING - 1

Claim Status ▾

Paid ▾

Save Close

For more information on writing off charges, please visit our [Write off Remaining Balance Help Article](#)

## Claim

- **New Indicator for Number of Claim Documents** Added an indicator for the number of documents associated with a claim or an ERA/EOB. This indicator is similar to our existing one for Patient Notes on claims and intake forms associated with a patient. It will display a red number on the "documents" button, indicating the number of associated documents.

### View from the claim screen:

> Claim Summary

> Estimate

> Patient Notes

> Follow Up Activity

> Alerts

> Tasks

> Documents **1**

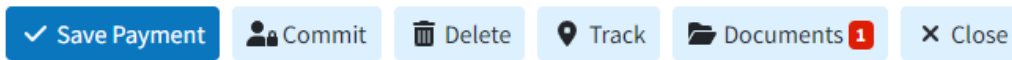
Payment

**Current Balance:** \$0.00

**New Balance:** \$0.00

**Copay Due:** \$25.00

### View from the Payment View Screen:



For more information visit our [Manage Documents for a Claim Help Article](#)

## Codes

- **New Support of Value Codes as a Contract Parameter:** Added a new checkbox option within Payer Associations for Contracts to support Value Codes as a contract parameter. When selected, users will have the opportunity to enter a single Value Code and Amount. The correct contract will be matched based on the Value Code and Amount (if present) when applying a payment. Please note that the system will continue to apply the contract that has the highest number of matching criteria.

**Create Payer Association**

Payers

Apply based on the claim's date of service

Apply based on the location or provider

Apply based on place of service

Apply based on modifier

Apply based on value code

Done Cancel

For more information on using our new Contract Payer Association, please visit our [Managing Payer Associations Help Article](#).

## Statements

- **Ability to Show Office/Facility Phone Number on Enhanced Statements:** We previously added the ability for users to show the facility/office contact information on enhanced statements. In this update we also added the ability to show the phone number for the office/facility within Enhanced Statement when the "Show Facility/Office contact information" box is selected.

Enhanced Statement Options

- Show Page Numbers
- Show Payment Stub
- Show Patient Comments
- Show insurance company, member ID, and group ID for all payers billed on the claim under Insurance Information
- Show Facility/Office address
  - Show Facility/Office phone number with address
- Show Prompt Payment Discount information (if applicable)
  - i The discounted amount will be shown as the AMOUNT YOU OWE and the Due Date will reflect the last date that the discount is applicable.
- Charge Breakdown
  - Summarized  Detailed

For more information on enabling enhanced statement options, please visit our [Configure User Print Statement Settings Help Article](#).

## Reports

- **Report Builder - New Age Calculation Option for Aging Buckets on Date Fields** We added a new checkbox option at the bottom of the Calculated Column dialog within the report builder that allows age calculations to show an Aging Bucket rather than the number of days.

New Calculated Column

Title

Calculation

Age

Column 1

Show as Aging Bucket

Done Cancel

- **Report Builder - New Report Fields for Family Balances** Added the ability to report on the patient's family balance by incorporating the following new report fields under Patient Data:
  - **Family Balance**
  - **Family Patient Balance**
  - **Family Insurance Balance**

