2024 CMD Enhancements

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hank you for the opportunity to serve you again in 2024. We're grateful for your trust and appreciate you usiness. It's been a fantastic year so far, and we're proud that throughout 2024, we've continued to fulfill ur commitments to create value for our clients, our people, and our partners. CollaborateMD was able to elease over 91 impressive software improvements in 2024, including 35 features requested by our ustomers through the Idea Exchange platform, and we'd like to take a moment to review the top 10 hanges we've made to better serve you.

10 Major 2024 Enhancements.

1. **Patient Intake Forms (Intelligent Intake)**: Currently, many practices still rely on paper forms or electronic forms that require manual input of each completed field into their software when handling the initial patient data entry. As electronic health records have become the norm and patients have become more tech-savvy, new opportunities have emerged to reduce paperwork and streamline fron office workflows. Updox, a part of EverHealth, has developed a Forms product that enables the creation of customized forms. The CMD app can then automatically send these forms to patients (as part of their appointment reminders) or manually, and subsequently receive the form data back as discrete fields that can be entered into the Patient section. This workflow reduces the chances of errors and increases automation in the patient check-in process.

   With this enhancement, we developed a Patient Intake Forms process that enables patients to complete forms online using their phone, tablet, or computer and submit them. Within CollaborateMI users will then receive the form data, associate it with patient records, and decide which data provide by the patient should replace or populate fields within the actual record making it a more efficient method of collecting information from the patient. For more information, please reference our Patien Intake Forms Help Articles.

2. **Email/Text Receipt Feature**: CollaborateMD has introduced a new email/text receipt feature to help our customers achieve better and more efficient communication with their patients by enabling the sending of receipts via email or SMS. This provides medical practices with greater flexibility and options for patients to receive their receipts in an effective and easy-to-understand format, enhancin patient satisfaction. As part of this enhancement, our receipts now offer a cleaner, more user-friendly and easy-to-read format, along with more useful information when printing a patient receipt. Furthermore, there is an option to print FSA/HSA receipts, which will include all the required additional information. Please see our Receipts Help Articles for more information.

3. **Ability to Save Credit Card Information**: We previously allowed patients to securely store their credi card information as a payment profile within the payment portal by selecting the "*Save my payment information for next time*" option. However, this convenient feature was not accessible within the application until now. With the cardholder's consent, payment (Credit Card) information can be savec for future payments. Users can now save this information when processing patient payments, allowin

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 will streamline the payment process and offer users greater control and flexibility i managing their payment methods. For more information take a look at our Save Payment Information Help Articles.

4. **Enhanced Auditing (Show History)**: CollaborateMD has been working on a new enhanced auditing project that will provide offices with an easy and transparent way of auditing changes made in the application. Our new **Enhanced User Auditing** allows you to see a detailed list of changes made to specific records throughout the application. This new auditing tool enables users to track modifications, changes, and updates within CMD for better auditing and accountability. With the new "Show History" feature, you can now determine which user changed specific information in the software and when, by providing an auditing table with all updates or changes made to a record, including the user, date and time, and the item changed.

   These new auditing records are also included in our existing User Audit Report, making it an even stronger tool for auditing multiple records simultaneously. The Show History capability has currently been deployed in the **Customer Setup** and **Patient** sections, and we will be adding it to other sections of the application systematically, with the Claims section scheduled for implementation in Q1 2025. For more information on our new Show History feature, please visit our Enhanced Auditing Help Articles.

5. **New Data Sync Service**: Many of CollaborateMD's customers are healthcare practices or billing service providers that operate across multiple states and have separate customers under their main accounts. This structure enables them to maintain distinct data for patients, claims, and payments for each customer. However, this setup also requires users to independently input setup data such as referring providers, facilities, various codes (procedure, fee schedules, diagnosis, remittance, revenue etc.), and payers for each customer, resulting in significant setup work. Some of this work could previously be mitigated by requesting a manual, one-time data copy.

   To convert this manual process into a completely automated solution, we created our **Data Sync** feature. Data Sync is a fully automated process that enables clients to automatically synchronize their data with multiple customers whenever an update is made. This feature will replace the Data Copy function but at a reduced cost for customers. By automating the process, it will enhance productivity within CMD and save time by eliminating the previous manual work required across multiple CMD departments when completing a Data Copy. For more information on enabling or using our new Data Sync feature, please visit our Manage Data Sync Help Article.

6. **New Productivity Reports**: To provide our customers with better tools to report on the productivity o their users, we developed our productivity reporting suite. Since none of the existing standard reports were designed for productivity monitoring, we created a new Dashboard Gadget and 3 additional reports to give our customers the capability to report on the productivity of their users across several

metrics. Our productivity reporting includes the following:

- **Dashboard Gadget**: **Average Touches to Completion** - A new dashboard gadget that displays 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 and has drill-through capability into the Touches To Completion Report.
- **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.

7. **Billing Alerts For Same or Similar Codes**: For this enhancement, we added a new option within the Procedure Codes screen that allows you to capture "same or similar" procedures done within a specifi time frame and warn users. This new feature enables you to add "same or similar" procedure codes th payers won't cover if billed within a specific timeframe. For example, Medicare only covers "routine foot care" (a.k.a. routine podiatry services) every 60 days. Adding these procedures to your **Same/Similar Code List** with a 60-day period will show a warning message when creating a new claim that falls within the period after a "same or similar" previously rendered procedure. For more information, please visit our Add CPT/HCPCS Help Articles.

8. **New Deposit Date Field**: 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 these delays and match them with their bank statements. Visit our Post Insurance Payments Help Articles for more information.

9. **New Option to Print EOB Information While Batch Printing Claims**: Since some paper claims for secondary/tertiary payers sometimes require additional documentation in the form of the primary payer's EOB, we added a new option for users to print EOBs directly from Claim Batch Print. If any claims set to send to the secondary or tertiary insurance are selected when printing batch claims, the system will now provide the option to print these EOBs as well. For more information about batch printing EOBs, please see our Print EOBs and Claims Help Article.

10. **New Print Option for Open Negotiations Form**: One of the key provisions of the federal No Surprises Act is that out-of-network providers can engage in open negotiations with the insurance company to determine the amount the insurance company will pay. To facilitate this process, we have added a nev print option within the Claim section. This allows users to directly print an Open Negotiation Form (OMB 1210-0136) from the claim screen, enabling out-of-network providers to enter into open negotiations with the insurance company to determine the payment amount for emergency services. For more information on how to print form OMB 1210-0136, please see our Print Open Negotiations

Form Help Article.