

2025 Release Notes

Modified on 01/06/2025 2:24 pm EST

Release 15.0.0 - January 6, 2025

New Features and Updates

General

Appointments

- **Added UI Improvements To The Scheduler's Eligibility & Forms Icons:** We reduced the size of the Eligibility and Forms icons and allowed them to take up vertical space when available, enabling more appointment information to be visible on the scheduler. We also changed the color of the "intake forms sent but not filled out" icon from yellow to gray, distinguishing it from the "intake forms not sent" icon.

The screenshot shows a scheduler interface with time slots on the left and appointment details on the right. The time slots are 12 pm, 15, 30, 45, 1 pm, 15, 30, 45, 2 pm, and 15. The appointment for SILVERTONGUE, LYRA is scheduled for 1 pm and is a 30-minute consult. The appointment for TEST, JOHNNY - CARDIOLOGY is scheduled for 30 minutes past the hour and includes a clock icon and a red box around a sand timer icon.

Patient

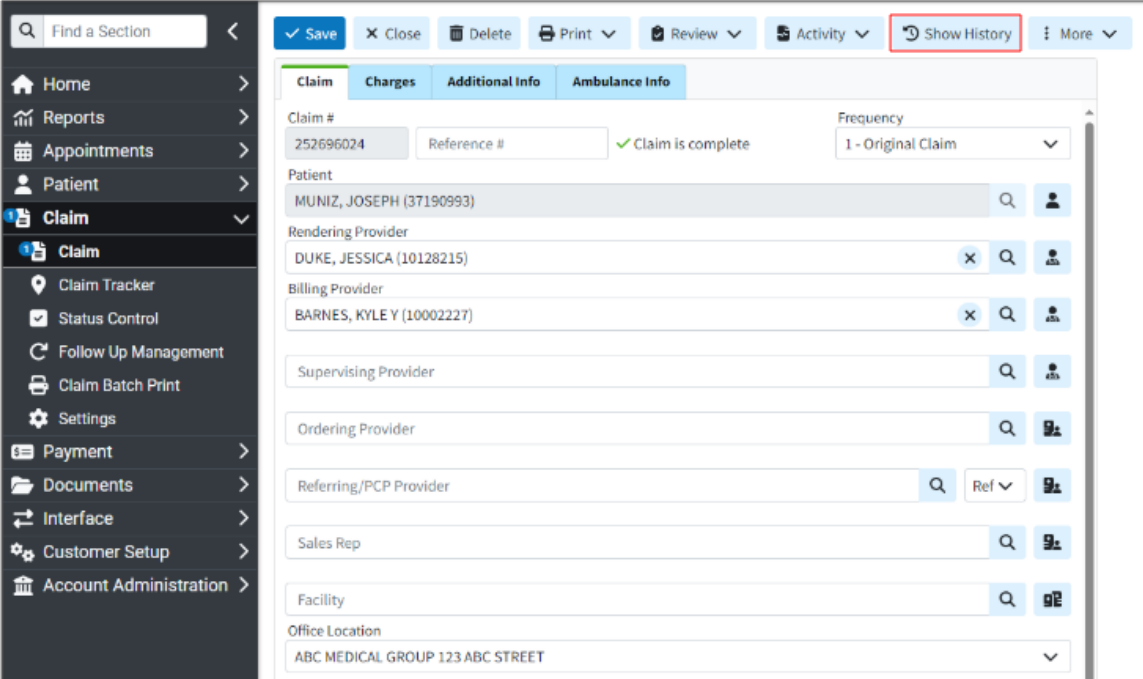
- **Updated The Statement Tracker "Status" Column:** Updated the Statement Trackers Status column to include the "user printed name." This allows users to see the print status, as well as the individual who printed the document, which improves the auditing process.

<input checked="" type="checkbox"/>	Patient	Invoice #	Date	Amount	Type	Status	
<input type="checkbox"/>	ALEXANDER, JONES	1262243014	10/20/2024	\$142.00	Statement	User Printed by alexramirez - Enhanced	
<input type="checkbox"/>	BEAR, TORI	1262243019	10/20/2024	\$13.00	Statement	User Printed by alexramirez - Enhanced	
<input type="checkbox"/>	TEST, ANGIE	1262243020	10/20/2024	\$837.00	Statement	User Printed by alexramirez - Enhanced	
<input type="checkbox"/>	GROOT, IAM	1262243023	10/20/2024	\$13.10	Statement	User Printed by alexramirez - Enhanced	
<input type="checkbox"/>	MCCLLOUD, FOX	1270798112	11/12/2024	\$20.00	Estimate Statement	User Printed by danielgoldsmith - Enhanced	
<input type="checkbox"/>	TEST, JOHNNY	1289758024	01/06/2025	\$998.04	Statement	User Printed by josephmuniz - Plain Text	

Claim

- **New Enhanced Auditing (Show History) for Claims** CollaborateMD has been working on a new enhanced auditing project that provides offices with an easy and transparent way of auditing change made in the application. We previously released our new Enhanced User Auditing feature in the Customer Setup and Patient sections of the application, allowing users to see a detailed list of change made to specific records throughout the application.

In this release, we are expanding our Enhanced Auditing functionality to the Claim section enabling users to track modifications, changes, and updates made to claims within CMD for better auditing and accountability. With the new "Show History" feature, you can now determine which user changed specific Claim information in the software and when, by providing an auditing table with all updates and changes made to a record, including the user, date and time, and the item changed.



The screenshot displays the 'Claim' form interface. On the left is a dark sidebar with a search bar and a list of navigation items: Home, Reports, Appointments, Patient, Claim (selected), Claim Tracker, Status Control, Follow Up Management, Claim Batch Print, Settings, Payment, Documents, Interface, Customer Setup, and Account Administration. The main content area has a top toolbar with buttons for Save, Close, Delete, Print, Review, Activity, Show History (highlighted with a red box), and More. Below the toolbar are tabs for Claim, Charges, Additional Info, and Ambulance Info. The 'Claim' tab is active, showing fields for Claim # (252696024), Reference #, Frequency (1 - Original Claim), Patient (MUNIZ, JOSEPH (37190993)), Rendering Provider (DUKE, JESSICA (10128215)), Billing Provider (BARNES, KYLE Y (10002227)), Supervising Provider, Ordering Provider, Referring/PCP Provider, Sales Rep, Facility, and Office Location (ABC MEDICAL GROUP 123 ABC STREET). A green checkmark indicates 'Claim is complete'.

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, Patient, and Claim sections, and we will be adding it to other sections of the application systematically.

For more information on using our new Add New Same/Similar Code List feature, please visit our [Enhanced Auditing Help Articles](#).

- **Status Control's "Current Payer" Column Update:** Updated the Status Control results screen to show more details about which payer is displayed. The "Current / Primary Payer" column will now be "Current Payer," and will include the payer priority (primary, secondary, tertiary) in parentheses if the filtered charge status is a payer status.

Claim #	DOS	Patient	Current Payer
252744839	12/09/2024	POPE, OLIVA	1199 NATIONAL BENEFIT FUND (Primary)
251048427	12/11/2024	DOE, JANE	ILLINOIS MEDICARE (Primary)
251048618	12/11/2024	SMITH, JIM	ILLINOIS MEDICARE (Primary)
251049522	12/11/2024	FLETCHER, JOHN	ILLINOIS MEDICARE (Primary)
251463320	12/17/2024	TEST, JOHNNY	AARP (Primary)
252800076	01/05/2025	SILVER, MARY	AMERIBEN SOLUTIONS (Primary)

Customer Support

- **New Signature Type Column Within Agreement Lookup:** Added a new column, hidden by default, to the agreement lookup screen. This column will store and display the "Signature Type" (based on the Provider Action field received from ePS) and includes a new report field under Agreement Data. The possible actions for the "Signature Type" are:
 - * Electronic Signature
 - * Online Enrollment
 - * Wet Signature
 - * Other

Showing agreements for: KEN TEST, DPM (#10036112568) (NPI #123456789) (Submitter ID #10010010) (Tax ID #05-00685)

Start Date	Payer	Payer ID	Product	Status
10/19/2022	RHODE ISLAND MEDICARE	RIMC	Remittance	Approved
10/19/2022	MEDICARE	CMS	Eligibility	Approved
10/19/2022	RHODE ISLAND			Approved
10/19/2022	ALBUQUERQUE			Approved
10/19/2022	UNITED HEALTH			Approved
10/19/2022	HARVARD PILG			Approved
10/19/2022	AETNA HEALTH			Approved
10/19/2022	NEIGHBORHOOD			Approved
10/19/2022	NEIGHBORHOOD			Approved
10/19/2022	UNITY INTEGR			Approved
10/19/2022	RHODE ISLAND			Approved
10/19/2022	RHODE ISLAND			Approved
10/19/2022	SECURE HORIZ			Approved
10/31/2022	PEAK PACE SO			Approved
03/28/2024	RHODE ISLAND			Approved
05/21/2024	RHODE ISLAND			Approved

Select Columns

Available Columns	Visible Columns
Approval Date +	Start Date
Provider Action +	Payer
Created by +	Payer ID
Provider ID/PTAN +	Product
Signature Type +	Status

Done

Payment Portal

- **New UI Updates to The Payment Portal:** Added some UI enhancements to the Payment Portal relate to new colors and margins for better consistency and a better customer experience. We also updated

the Payment Portals password requirements to now require at least 12 characters and disallow the reuse of any previous passwords.

The screenshot shows a patient portal interface. On the left is a dark navigation menu with the following items: 'My Statement' (with a home icon and a right arrow), 'Visit History' (with a person icon), 'Payment History' (with a dollar sign icon), 'Preferences' (with a gear icon), and 'Sign Out' (with a left arrow icon). The main content area is white and contains several sections. At the top, there is a yellow box with the text 'You owe \$877.00' and 'Due today. Thank you!'. To the right of this box is a yellow button labeled 'Pay Now'. Below the yellow box is a light green box with the text 'Pay Over Time!' and '\$48.73 - \$146.17 per month.'. To the right of this box is a green button labeled 'Choose Your Plan'. Below these boxes is the section 'Account Summary' with a table of charges: Total Charges (\$877.00), Insurance Payments (\$0.00), and Insurance Adjustments (\$0.00). At the bottom of the main content area is the section 'Recent Visit Summary'.

You owe \$877.00	Pay Now
Due today . Thank you!	
Pay Over Time!	Choose Your Plan
\$48.73 - \$146.17 per month.	
Account Summary	
Total Charges	\$877.00
Insurance Payments	\$0.00
Insurance Adjustments	\$0.00
Recent Visit Summary	