

Release 15.1.0 - January 21, 2025

Modified on 01/23/2025 3:12 pm EST

New Features and Updates

General

Patient

- **New Statement Batch Print Search Options:** We added the Default Provider and the Default Referring Provider as search (filter) options within Statement Batch Print, so only patients with the selected default referring or rendering providers are returned. This option will not affect the generated statement, which will continue to include all charges regardless of the rendering or referring provider on the claim.

The screenshot displays the 'Statement Batch Print' interface. On the left is a dark sidebar with a search bar 'Find a Section' and a list of navigation items: Home, Reports, Appointments, Patient (expanded), Patient, Manage Account, Payment Plans, A/R Control, Batch Eligibility, Statement Batch Print (highlighted), Statement Tracker, Label Batch Print, Communications..., Settings, Claim, Payment, Documents, Interface, Customer Setup, and Account Administration. The main content area is titled 'Filters Load Save' and includes a 'Search' button. Under 'Type', there are radio buttons for 'Statement for outstanding charges' (selected), 'Payment Plan statement', and 'Final Demand Notice'. Below this are several filter fields: 'Statement Amount' (Greater Than, 0.00), 'Electronic Statements Sent' (Any), 'Paper Statements Sent' (Any), 'Total Statements Sent' (Less Than, 3), and 'Days Since Last Statement' (Greater Than, 30). An 'Account Type' dropdown is also present. A red box highlights two new search filters: 'Default Provider' (with a search icon and info icon) and 'Default Referring Provider' (with a dropdown arrow and info icon). At the bottom, there are radio buttons for 'Statements to send': 'Paper Statements' (selected) and 'Electronic Statements'.

Payment

- **Updated The Default ACCOUNT CREDIT & APPLY ACCOUNT CREDIT Memos:** We updated the default account credit memo, created when an account credit is generated based on a payment or

adjustment, to include more information about the credit. In this release, we also updated the APPLY ACCOUNT CREDIT memo line to include additional details (such as the source and check number) that will be visible in the Manage Account and Activity screens once the credit is applied.

DOS / Received Date	Procedure	Status / Memo	Amount	Applied	Balance
01/21/2025		APPLY ACCOUNT CREDIT - PATIENT PAYMENT - CHECK - 123456789	\$100.00	\$100.00	
08/16/2022			\$600.00	\$200.00	\$400
08/16/2022	00100	SEND TO HUMANA VIA CLEARINGHOUSE	\$600.00	\$200.00	\$400
10/05/2022		PAYMENT FROM AETNA	\$200.00	\$200.00	
10/05/2022		ADJUSTMENT BY AETNA	\$0.00	\$0.00	
08/16/2022	00600	CLAIM AT AETNA	\$0.00	\$0.00	\$0
10/05/2022		PAYMENT FROM AETNA	\$0.00	\$0.00	
10/05/2022		ADJUSTMENT BY AETNA	\$0.00	\$0.00	
08/11/2022			\$457.00	\$457.00	\$0
08/11/2022	85004	PAID	\$300.00	\$300.00	\$0

- New ERA Auto Post:** Added a new ERA Auto-Post billing option that can be configured by Payer and pay priority (primary, secondary, etc.). Once enabled and configured, the Electronic Remittance Advice will automatically check for errors or warnings on most ERAs and, if the ERA is free of issues ("clean"), will automatically apply the payments with no interaction or review required.

Clearinghouse Connection
 Notes
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 Billing Options

General Provider Patient ERA

Process PR-45 (patient responsibility amount in excess of fee schedule/maximum allowable) as an Adjustment when an ERA is posted, rather than as Unpaid?
 Yes No

Process PR-242 (services not provided by network/primary care providers) as an Adjustment when an ERA is posted, rather than as Unpaid?
 Yes No

Electronic Remittance Advice Automation

- Allow this payer's ERAs that fully apply with no errors to auto-post without review
 - Show a dialog with the payment details before auto-posting
 - Commit the payment after it has been applied
 - Allow secondary payments to auto-post
 - Allow payments that do not match the contract amounts to auto-post
 - Allow payments with denials or \$0.00 allowed amounts to auto-post
 - Allow duplicate payments (remit code 18) to auto-post
 - Allow payments with refunds/reversals to auto-post
 - Allow payments to patients/claims with Payment Alerts to auto-post
 - Allow payments with Provider Adjustments that were not applied to claims to auto-post

For more information on configuring this new ERA Automation billing option, please visit our [ERA Billing Options Tab Help Article](#).

