

Release 15.2.0 - February 4, 2025

Modified on 02/11/2025 1:29 pm EST

New Features and Updates

General

Appointments

- **New Appointment Setting to Hide The Status of Received/Applied Intake Forms:** Some users who have tightly packed schedules (double/triple booked) may struggle to see the specifics of their appointments due to the two types of icons we show (the eligibility icon and the forms icon) taking up a lot of the appointment space. To help with this, we introduced a setting that allows users to hide the checkmark that indicates forms that have been submitted.

Appointment Settings for User: josephmuniz

Show a warning when opening a past appointment:
 Yes No

Prompt me to schedule requests from the waiting list when:
 Moving an appointment
 Deleting, canceling, or rescheduling an appointment

Enable drag-and-drop in the scheduler:
 Yes No

Hide the status of Intake Forms on the scheduler when intake forms have been received and applied?
 Yes No

Visit our [Configure User Appointment Settings Help Articles](#) for more information on how to turn on this setting.

Patient

- **New Patient Broadcast Communications Feature** Patient engagement is the collaborative process between healthcare providers and patients aimed at improving patient health. Over the past few years the significance and prevalence of patient engagement have grown considerably. Research indicates that when patients feel involved and take an active role in their medical care, they achieve improved health results. Simultaneously, providers observe increased patient satisfaction and retention.

In order to meet the growing needs of both providers and patients, CollaborateMD has developed and introduced a new Patient Broadcast Communications feature. This feature allows providers to send

targeted one-way communications to multiple patients using various methods (text, email, or phone). Customers can set campaigns with customized parameters to target specific patients, helping them with their healthcare needs and encouraging retention or usage of optional/elective medical services through intelligent marketing.

The screenshot displays a software interface for patient communications. On the left is a dark sidebar with a search bar and navigation menu. The main content area is titled 'Filters' and contains two sections: 'Date Search Options' and 'Appointment Search Options'. The 'Date Search Options' section includes a radio button for 'By # of days' (selected) and 'By date range'. Below this are several dropdown menus for 'Days Since Last Seen', 'Days Since Recall Date', 'Days Since Follow Up Date', 'Days Since Appointment Date', 'Days Until Next Appointment', 'Next Appointment Not Scheduled', and 'Days Since Date of Service', all set to 'Any'. The 'Appointment Search Options' section has dropdown menus for 'Appointment Status', 'Appointment Type', 'Resource', and 'Facility'. A search button and a message 'Please select filter criteria and run search to view results' are also visible.

For more information on using our new Patient Broadcast Communications feature, please visit our [Broadcast Communications Help Articles](#). For instructions on how to enable and configure the feature, visit our [Manage Broadcast Communications Help Article](#)

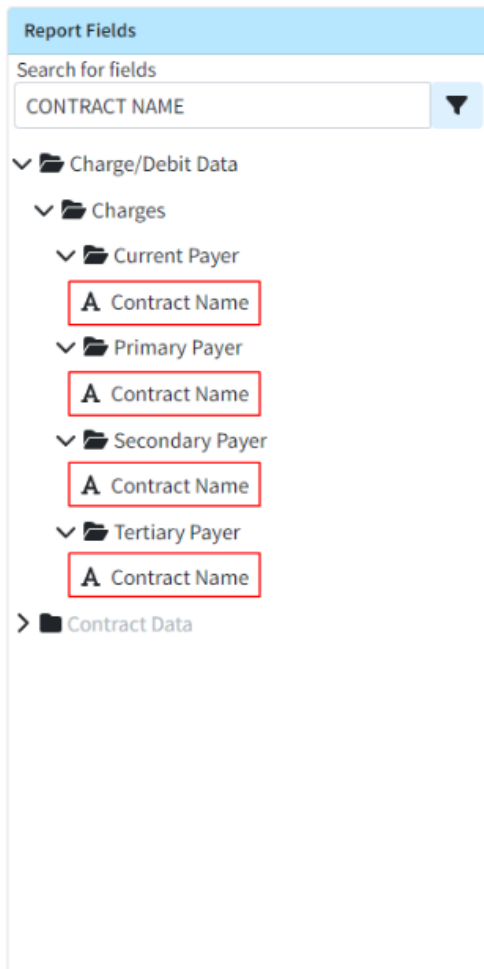
- **New A/R Control Filters:** Some of our customers have very particular workflows and have requested to be able to search in A/R Control by Referring and Rendering providers. This would enable them to send out statements only for claims from a particular provider. To address this need, we added the ability to filter by Rendering or Referring Provider within A/R Control, allowing customers to send statements only for claims from a specific provider or referrer. These new filter options were added under a new header within the A/R Control Filters called "Claim Search Options." Additionally, the existing Payer, Charge Balance, and Charge Status filters have been moved under the Claim Search Options.

For more information on these new filters, please visit our [Search For Patient Balances Help Article](#).

Reports

- **New Report Fields For Contract Name:** We previously had a number of fields that could be used to show the contract price that applies to a charge. In this release, we added "Contract Name" as a report

field under those same data sections . This new field is available under Charge/Debit Data > Charges > Current Payer (as well as Primary/Secondary/Tertiary Payers).



- **New Report Fields For Patient Communication Preferences** We added the ability to include information about communication opt-ins in reports, enabling customers to conduct targeted outreach to patients to encourage them to opt-in. The following new communication preferences report fields have been added under **Patient Data > Communications**:
 - Electronic Payment Plan Statements Communication Preference
 - Electronic Statements Communication Preference
 - Marketing Communications Preference
 - Receipts Communication Preference

Report Fields

Search for fields

COMMUNICATION

- > Broadcast Message Data
- ✓ Patient Data
 - ✓ Communications
 - ⌘ Electronic Payment Plan Statements Comm
 - ⌘ Electronic Statements Communication Prefe
 - ⌘ Marketing Communication Preference
 - ⌘ Receipts Communication Preference