Release 15.2.0 - February 4, 2025

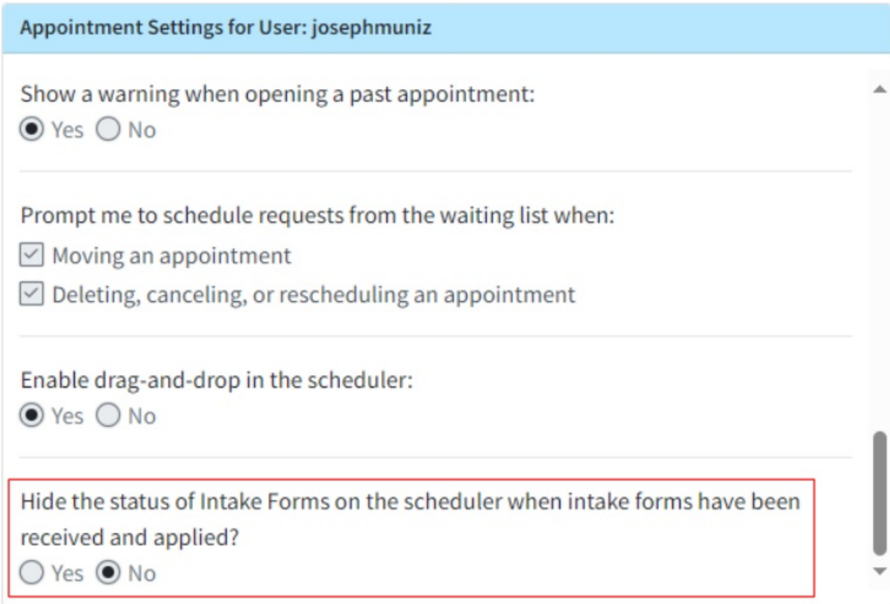
Last Modified on 02/11/2025 1:29 pm EST

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 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.

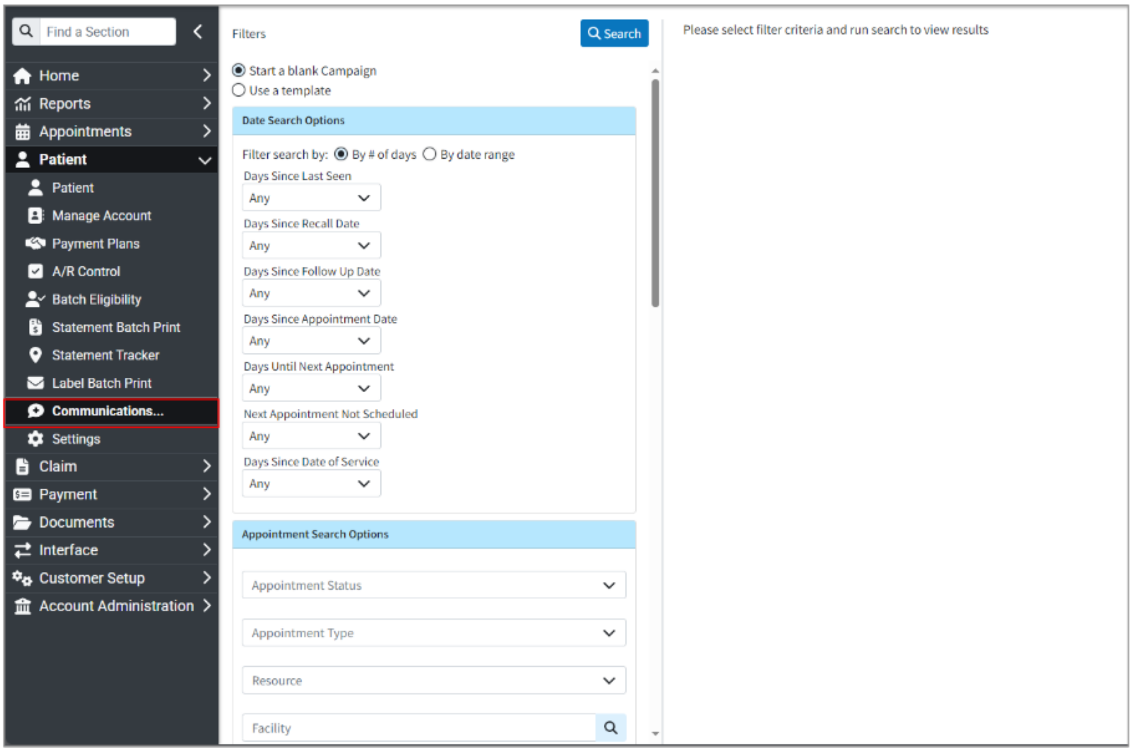
  

  Visit our Configure User Appointment Settings Help Articles for more information on how to turn on this setting.

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 year 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.



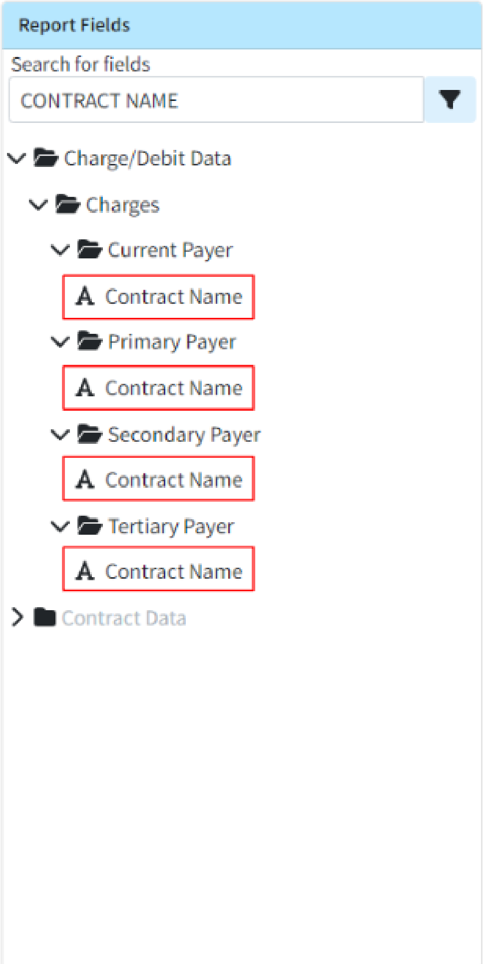
For more information on using our new Patient Broadcast Communications feature, please visit our Broadcast Communications Help Articles. For instructions on how to enable and configure the feature, visit our Manage Broadcast Communications Help Article.

- **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.

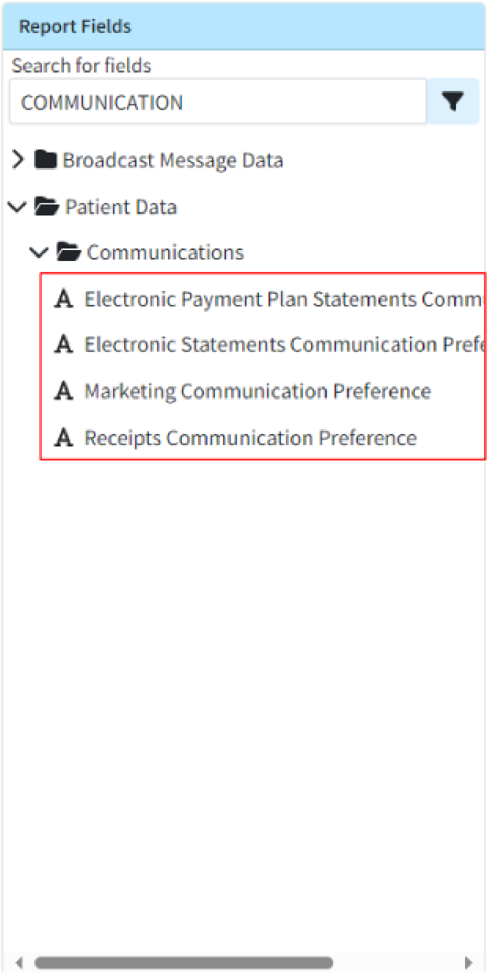
  For more information on these new filters, please visit ourSearch For Patient Balances Help Article.

eports

- **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 repo 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 outreac 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 Pref
Marketing Communication Preference
Receipts Communication Preference