Release 15.4.0 - March 3, 2025

New Features and Updates

General

:laims

- **New Mass Claim Updates Feature:**CollaborateMD has always provided powerful tools for working with individual claims, but the platform's ability to make changes to multiple claims at once was limite With this release, users no longer have to open each claim individually when correcting minor mistakes, such as setting the wrong rendering provider or place of service code on claims. We added a new Mass Claim Updates feature that enhances the existing Status Control screen with capabilities to modify multiple claims. The Status Control screen has been renamed Claim Control, where users can now manage the review of incoming claims from their EHR, submit or resubmit claims, and make updates to multiple claims at once, such as updating the Rendering and Billing Providers, the Facility, the Office Location, or the Place of Service by simply selecting the claim(s) and choosing the Update Claims option.
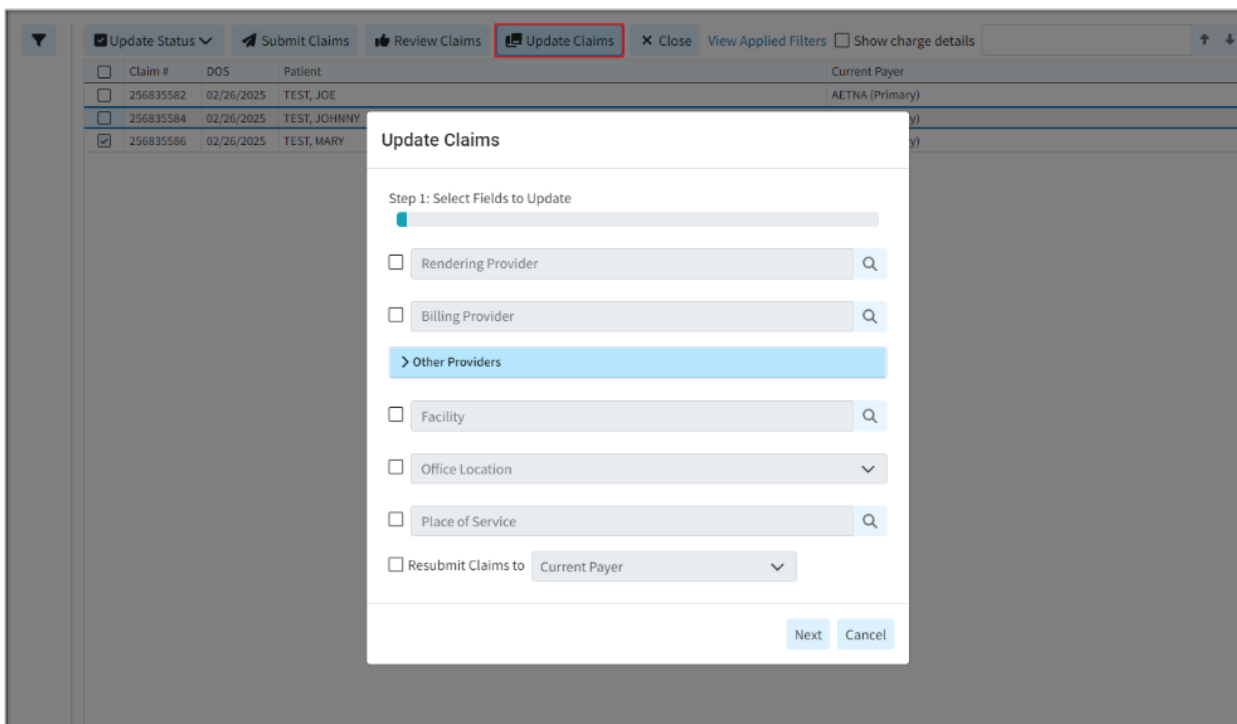

  For more information on updating multiple claims at once, please visit ourUpdate Multiple Claims Hel Article.

- **Alternate Option To Open A Claim In a Separate Tab When Another Claim Is Already Open:**We have introduced a new dialog box option that appears when a user attempts to open a claim from any section within the CMD while a claim is already open. This feature will now provide the user with the

following options:

- **Close and Open** - Closes the open claim and opens a new one (it will display the usual unsaved changes warning and allow the user to save if there are unsaved changes).
- **Open in New Tab** - Opens a new window/tab with the correct URL/claim
- **Cancel** - Closes the dialog and keeps the claim open.
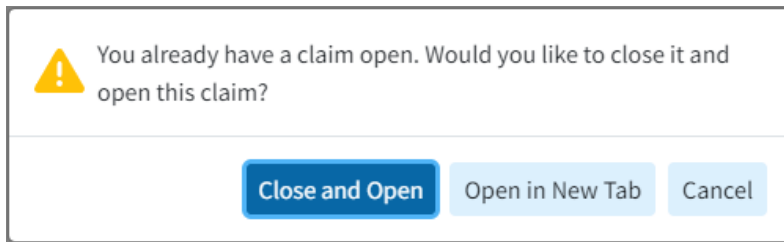
- **<u>Update to the Report Builder to Prevent the "Claim Last Billed Date" Field from Being Added as a Filter:</u>** Updated the Report Builder to prevent adding the "Claim Last Billed Date" report field as a Report Filter. While some customers may still try using this field as a filter, we've added a warning message directing them to use the "Charge Last Billed Date" instead, which provides the same results is much faster, and can potentially be improved further via an index.
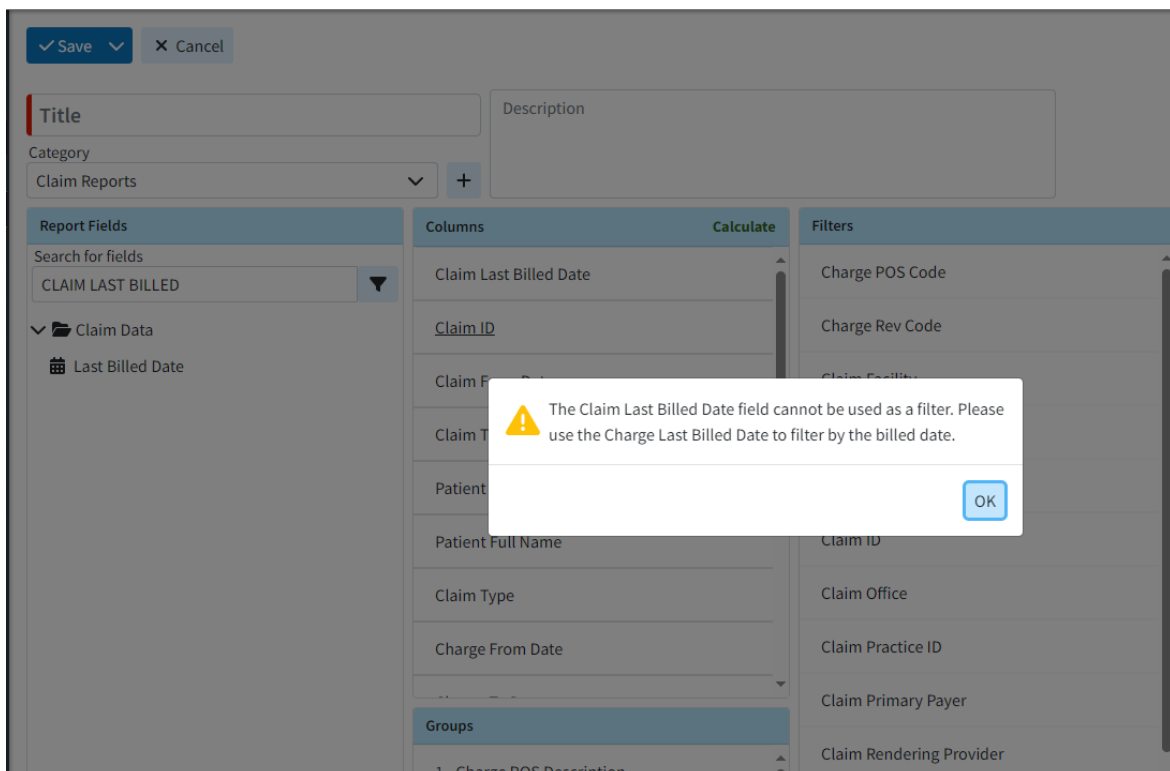
- **New Appointment View Option From The Patient Section:** Previously, the "View All Appointments" button directed users to the Appointment section to view a patient's appointment details, requiring them to leave the current section even if they only needed the dates of past appointments. In this release, we added a new "Appointments" option in the patient side panel that displays a list of all appointments (categorized into Past Appointments and Future Appointments) for the patient without leaving the screen. The section will still provide an option for users to access the "View All Appointments" button, directing them to the Appointment section where they can see patient appointment details.
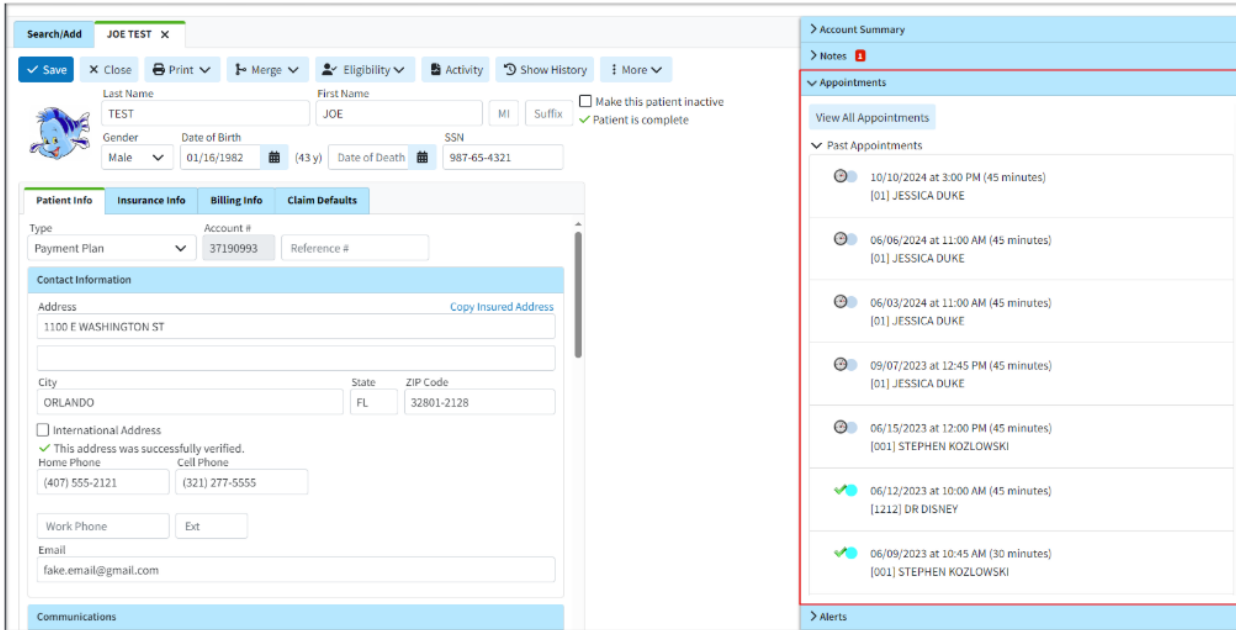
For more information on our new Appointments dropdown, please visit our View Appointments From Patient Section Help Articles.

Customer Setup

- **New Option to Open Contracts and Fee Schedules From Procedure & Revenue Codes Section:** We added the ability for users to open contracts and fee schedules directly from the Procedure and Revenue Codes sections. This new functionality enables users to click on the Fee Schedule/Contract Name (which is now a clickable link) within the Contracts and Fee Schedules side panel, allowing them to access and view the associated contracts and fee schedules.

For more information on accessing fee schedules/Contracts from procedure codes, please visit our Procedure Codes Fee Schedules or Procedure Codes Contract Help Articles. For information on accessing fee schedules/Contracts from revenue codes, please visit our Revenue Codes Fee Schedule or Revenue Codes Contract Help Articles.

User Profile

- **New Email Option For Two-Factor Authentication:** We updated our Two-Factor Authentication to now support email authentication. This option will send an email message with a 6-digit login code, similar to the SMS verification, and can only be set up with the email attached to the user's CMD profile. Please note that if an email address is used that does not match the one set in your user profile, you will receive a warning.

Two-Factor Authentication (2FA) Setup

You are required to set up two-factor authentication (2FA) to help keep your account secure. Once 2FA is set up on your account, you will be required to perform an additional step once per month when you log in. We recommend that you set up at least two methods of authentication so that you can still log in if you forget or lose your primary device.

Available Authentication Methods

Email Authentication
Emails should arrive within a few minutes. Please check your Spam if you don't see it.

Add Email Authentication

When you log in, we'll send you an email with a unique code that you

⚠ You do not have an email address associated with your user profile. To continue setting up two-factor authentication with an email address, an admin or auth rep must set an email address on your user profile.

OK

Didn't receive an email? Resend Code

Important: Never give your verification codes to anyone.

Cancel