Release 15.12.0 - June 23, 2025

t Modified on 06/23/2025 4:02 pm EDT

New features | Enhancements

Highlights

New Features	Enhancements
Tasks Available in Multiple New Sections	Net Amount now Available in Activity Report
New Enhanced Auditing (Show History) for Contracts	Incremental Data Snapshot Option

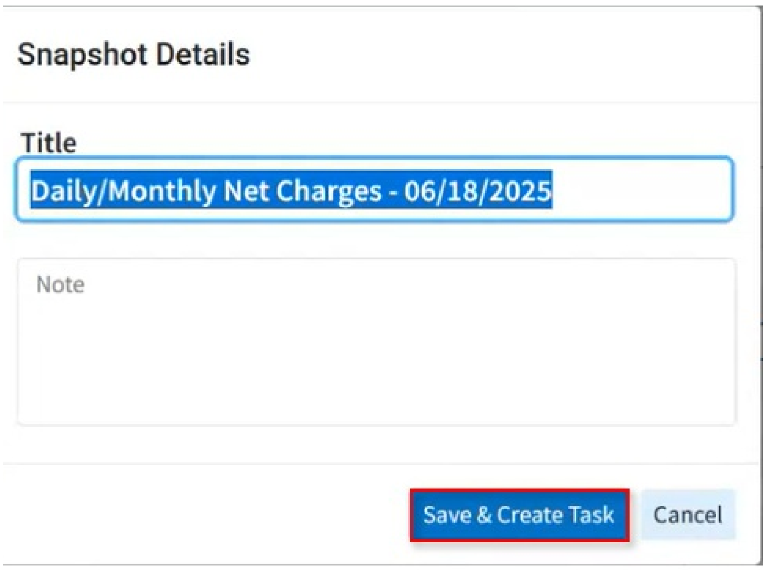
New features

asks Added to Multiple Sections

Ve added the ability to add tasks reminders associated with specific records within more sections of the pplication in order to keep track of items that need to be completed. Tasks can have due dates, links, escriptions, statuses, and priorities. Please be aware that some of these task management options are vailable in plan 3 and above. You can now assign the following tasks to yourself or to specific users/groups vithin your business:

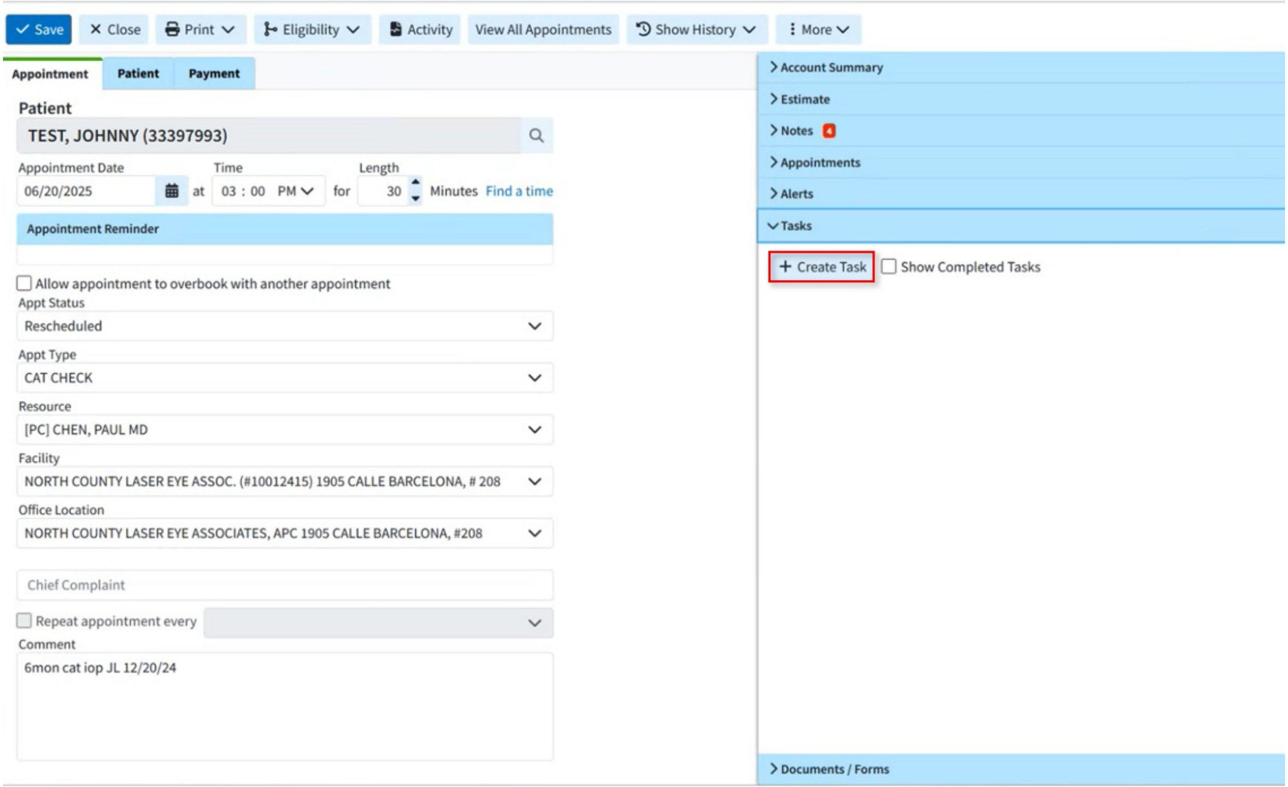
eport Snapshot Tasks

new option was added to create tasks from a Report Snapshot, allowing you to assign a user or group to eview specific report results. Creating a task from a report will have the report snapshot linked to it and vill be available for 90 days. For more information on saving and creating a task on a report, visit our Creat Task for a Report Help Article



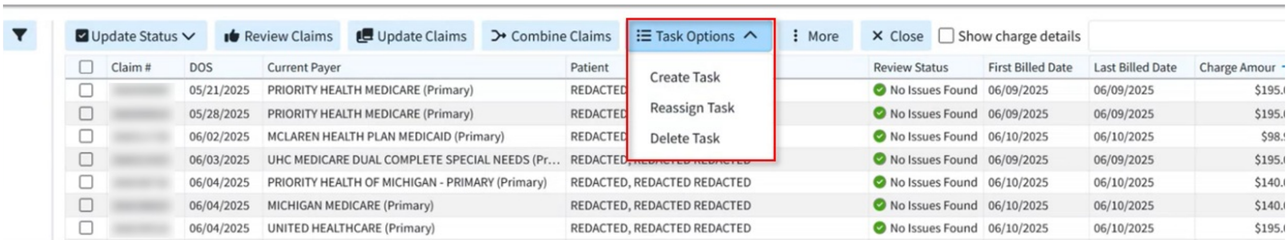
ppointment Tasks

Ve also added the ability to create and link tasks to specific appointments. Users can access this feature vi
ne right-click menu within the scheduler or the new tasks side panel option. Visit our Appointment Tasks
lelp Articles for more information on adding and managing appointment tasks.



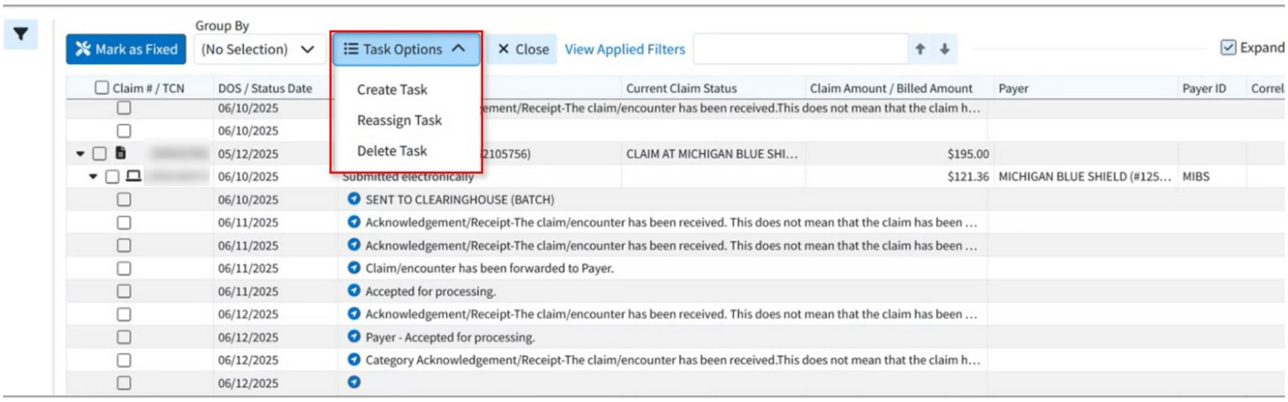
asks From Claim Control

Ve added new Task Options within the Claim Control screen, allowing users to create and manage tasks
ssociated with specific claims. This new option allows users to create and link tasks to multiple claims at
nce, as well as reassign and delete them simply by checking them off. For more info on creating tasks from
laim Control, visit our Claim Control Task Options Help Article.



asks From Claim Tracker

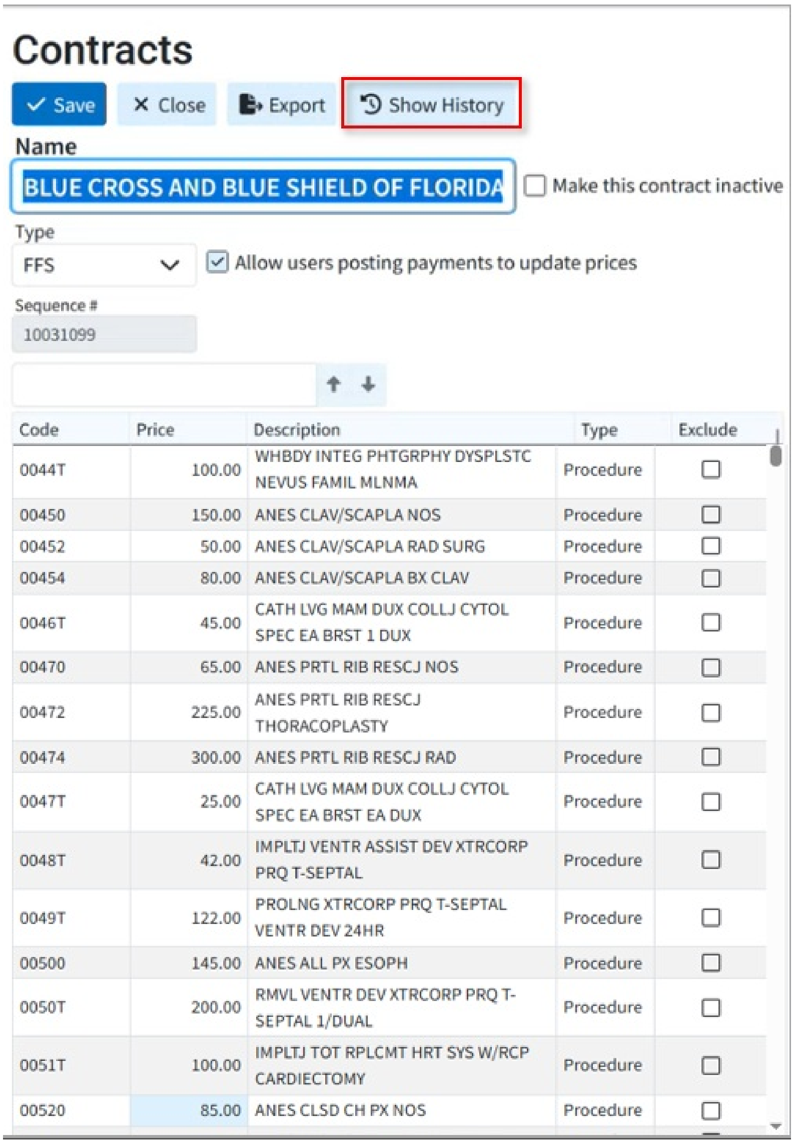
Ve also added new Task Options within the Claim Tracker screen, allowing users to create, manage,
eassign, and delete tasks associated with specific claims simply by checking them off. Tasks can also be
nked to multiple claims simultaneously. Visit our Claim Tracker Task Options Help Article for more
nformation.



lew Enhanced Auditing (Show History) for Contracts

ollaborateMD has been working on a new enhanced auditing project that will provide offices with an eas nd transparent way of auditing changes made in the application. We previously released our new nhanced User Auditing feature in the Customer Setup, Patient, Claim, Appointment, Payment Profiles, iterface Settings, Fee Schedules, and all Customer-level Payment, Claim, and Patient settings sections of ie application, allowing users to see a detailed list of changes made to specific records throughout the pplication.

i this release, we are expanding our Enhanced Auditing functionality to **Contracts**, enabling users to track iodifications, changes, and updates made to contracts for better auditing and accountability. With the nev **Show History**" feature, you can now determine which user changed/updated a specific contract in the oftware and when by providing an auditing table with all updates or changes made to a record, including ie user, date, time, and the record changed.



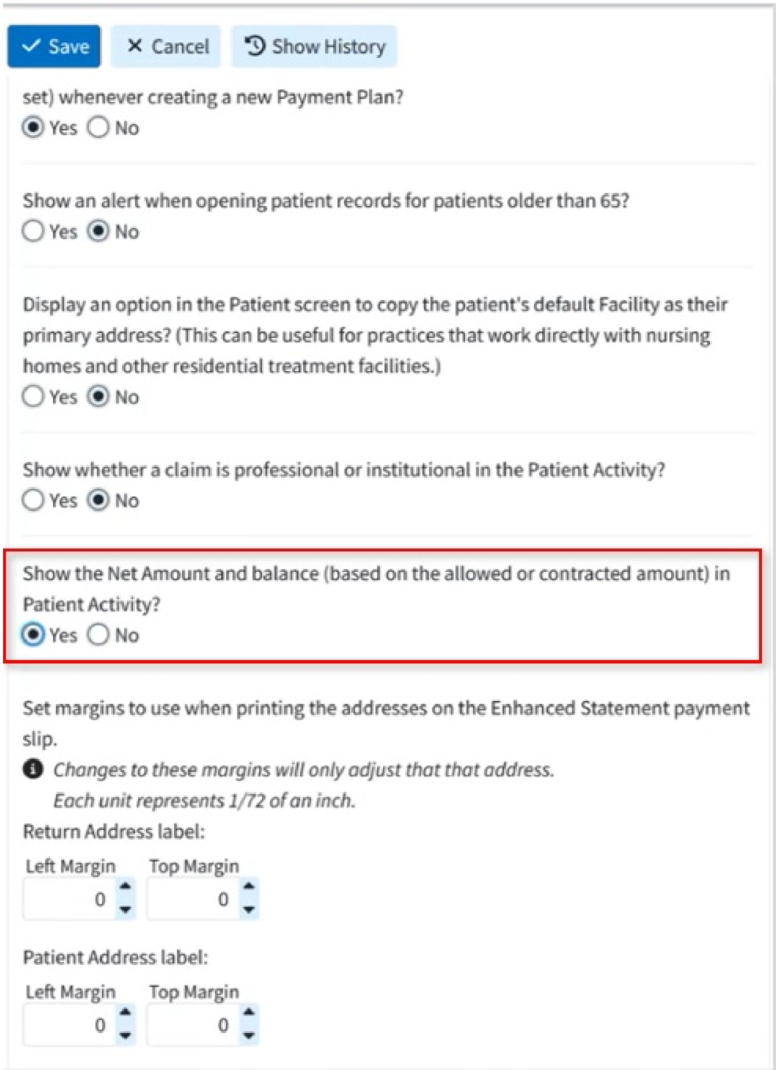
Code	Price	Description	Type	Exclude
0044T	100.00	WHBDY INTEG PHTGRPHY DYSPLSTC NEVUS FAMIL MLNMA	Procedure	
00450	150.00	ANES CLAV/SCAPLA NOS	Procedure	
00452	50.00	ANES CLAV/SCAPLA RAD SURG	Procedure	
00454	80.00	ANES CLAV/SCAPLA BX CLAV	Procedure	
0046T	45.00	CATH LVG MAM DUX COLLJ CYTOL SPEC EA BRST 1 DUX	Procedure	
00470	65.00	ANES PRTL RIB RESCJ NOS	Procedure	
00472	225.00	ANES PRTL RIB RESCJ THORACOPLASTY	Procedure	
00474	300.00	ANES PRTL RIB RESCJ RAD	Procedure	
0047T	25.00	CATH LVG MAM DUX COLLJ CYTOL SPEC EA BRST EA DUX	Procedure	
0048T	42.00	IMPLTJ VENTR ASSIST DEV XTRCORP PRQ T-SEPTAL	Procedure	
0049T	122.00	PROLNG XTRCORP PRQ T-SEPTAL VENTR DEV 24HR	Procedure	
00500	145.00	ANES ALL PX ESOPH	Procedure	
0050T	200.00	RMVL VENTR DEV XTRCORP PRQ T-SEPTAL 1/DUAL	Procedure	
0051T	100.00	IMPLTJ TOT RPLCMT HRT SYS W/RCP CARDIECTOMY	Procedure	
00520	85.00	ANES CLSD CH PX NOS	Procedure	

hese new auditing records are also included in our existing User Audit Report, making it an even stronger ɔol for auditing multiple records simultaneously. The Show History capability will be systematically added ɔ other sections of the application. For more information visit our Enhanced Auditing (Show History) Help ırticle.

:nhancements

Jet Amount now Available in Activity Report

Ve added a new user-level setting to the Patient Settings to display the Net Amount (based on the allowed r contracted amount) in the Patient Activity section. When set to "Yes" (the default is "No"), the Net ımount and Net Balance will be shown in the Claim listing in the Patient Activity.



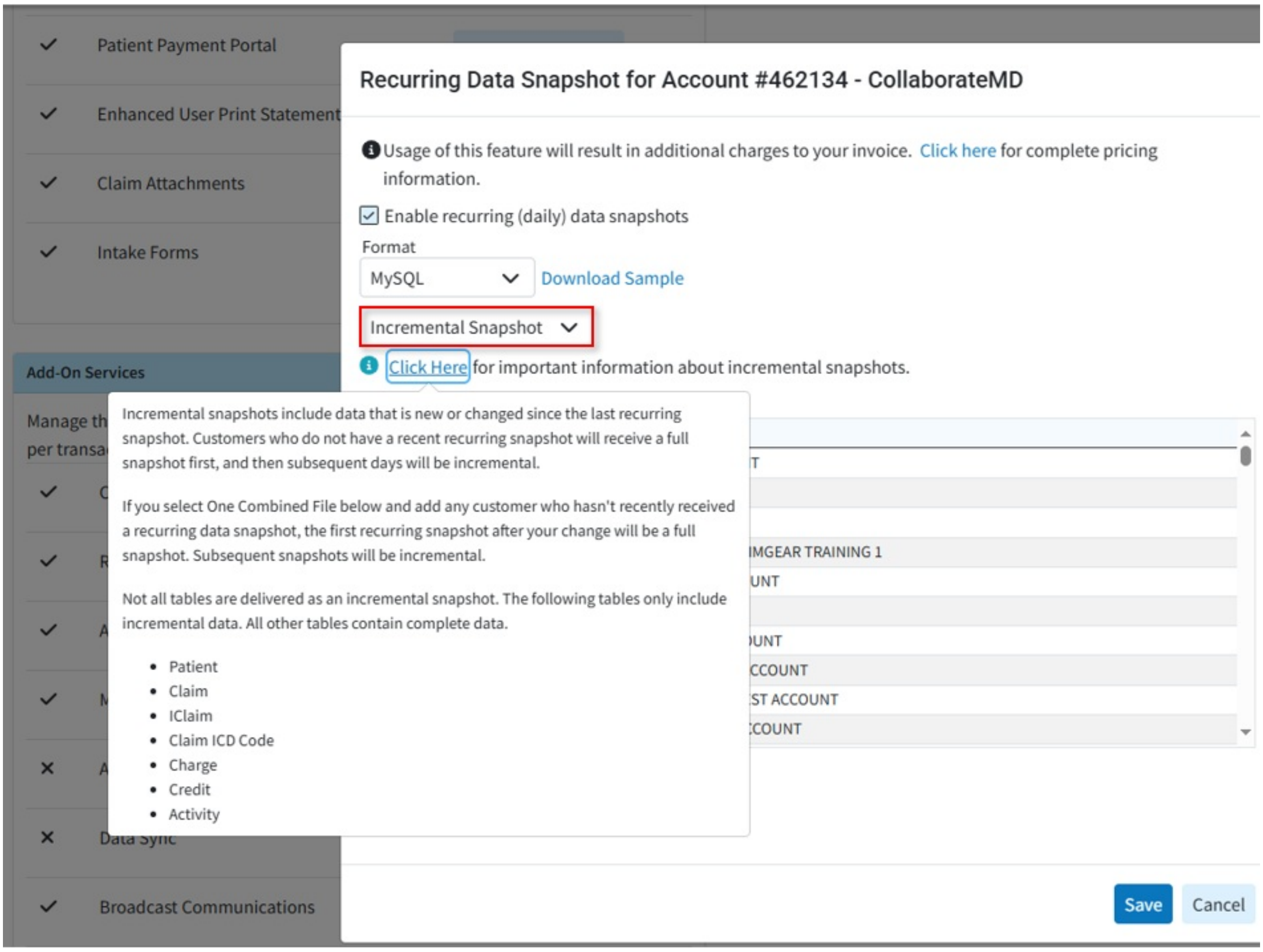
his option was added to allow users to view claims on a net basis. When this option is selected, the Balanc olumn will no longer be displayed. Instead, users can utilize the Net Amount and Net Balance columns to ee the expected revenue, regardless of whether a contractual adjustment has been entered yet.

Procedure	DOS/Received	Entered	Description	Units	Charge	Net Amount	Payment	Adjustment	Net Balance
99212	02/01/2024	02/01/2024	OFFICEOP VISIT EST PT KEY COMPONENTS ...	1	$250.00				
	SEND TO BLUE CROSS AND BLUE SHIELD OF FLORIDA VIA CLEARINGHOUSE as of 11/12/2024					$138.99	**$0.00**	**$0.00**	**$138.9**
11055	02/01/2024	02/01/2024	TRIM SKIN LESION	1	$208.00				
	SEND TO BLUE CROSS AND BLUE SHIELD OF FLORIDA VIA CLEARINGHOUSE as of 11/12/2024					$0.00	**$0.00**	**$0.00**	**$0.0**
Claim Totals					**$458.00**	**$138.99**	**$0.00**	**$0.00**	**$138.9**

or more info on enabling this setting, visit ourConfigure Patient Settings Help Article.

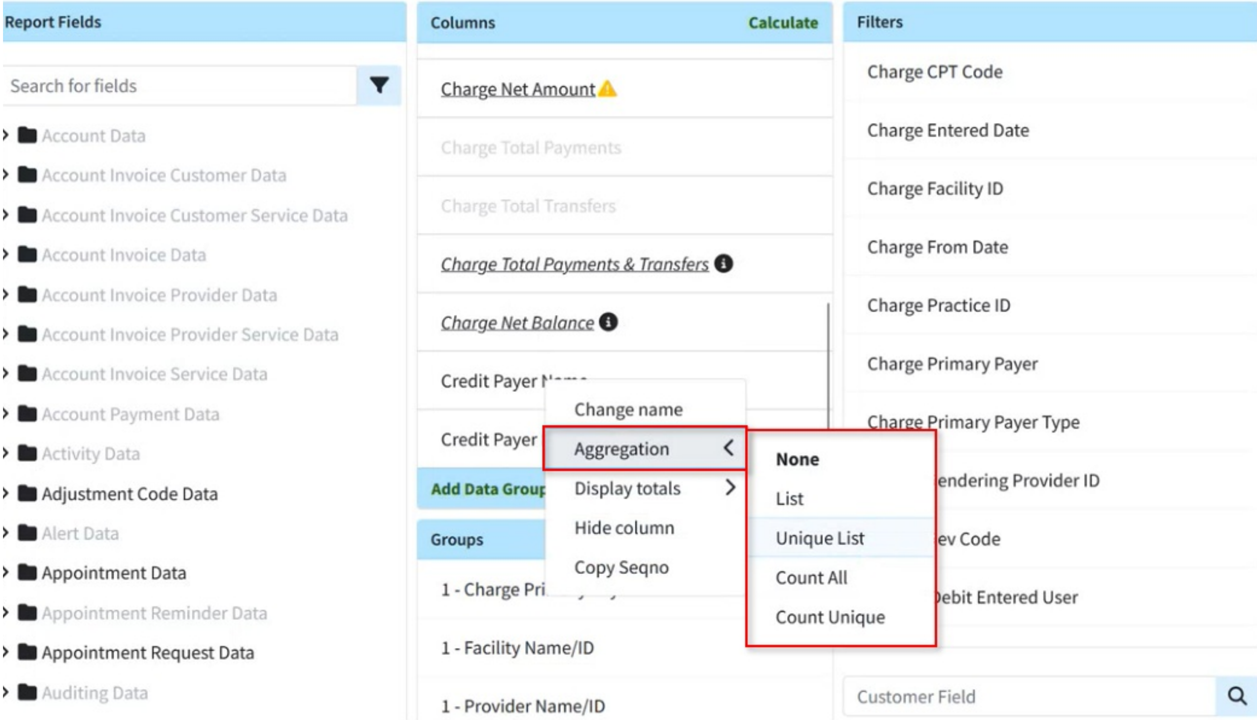
Jew Incremental Data Snapshots

ı this release, we added a new option for Recurring Data Snapshots to minimize processing time. This ption captures only changed items in larger tables, rather than a complete daily database snapshot. When onfiguring this new "Incremental Snapshot" option, the initial snapshot (or the first snapshot after adding ew customer to a combined snapshot) will be a full snapshot. Subsequent snapshots will export smaller les containing only changed data for **Patient**, **Claim**, **Charge**, **Credit**, and **Activity tables**; all other datasets vill receive full data. This ensures your snapshot is prioritized and available sooner than full snapshots. Visi ur Recurring Data Snapshot Help Article for more info on setting up an Incremental recurring snapshot.



lew Aggregation of Text Columns on Reports

Ve updated the Report Builder to allow aggregations of text columns (in addition to numeric and date) intc ist, Unique List, Count, and Count Unique. This allows users to create reports detailing payment ıformation, such as a list of payers for a specific claim, a report of all remittance codes, or a summary of istinct check numbers, in order to prevent duplicate lines.


Report Fields
Search for fields
Account Data
Account Invoice Customer Data
Account Invoice Customer Service Data
Account Invoice Data
Account Invoice Provider Data
Account Invoice Provider Service Data
Account Invoice Service Data
Account Payment Data
Activity Data
Adjustment Code Data
Alert Data
Appointment Data
Appointment Reminder Data
Appointment Request Data
Auditing Data
Columns
Calculate
Charge Net Amount
Charge Total Payments
Charge Total Transfers
Charge Total Payments & Transfers
Charge Net Balance
Credit Payer
Credit Payer
Add Data Group
Groups
1 - Charge Pri
1 - Facility Name/ID
1 - Provider Name/ID
Change name
Aggregation
Display totals
Hide column
Copy Seqno
None
List
Unique List
Count All
Count Unique
Filters
Charge CPT Code
Charge Entered Date
Charge Facility ID
Charge From Date
Charge Practice ID
Charge Primary Payer
Charge Primary Payer Type
endering Provider ID
ev Code
ebit Entered User
Customer Field