

Release 15.12.0 - June 23, 2025

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

New features | Enhancements

Highlights

New Features

Tasks Available in Multiple New Sections
New Enhanced Auditing (Show History) for Contracts

Enhancements

Net Amount now Available in Activity Report
Incremental Data Snapshot Option

New features

Tasks Added to Multiple Sections

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

Report Snapshot Tasks

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

Snapshot Details

Title

Daily/Monthly Net Charges - 06/18/2025

Note

Save & Create Task

Cancel

Appointment Tasks

We also added the ability to create and link tasks to specific appointments. Users can access this feature via the right-click menu within the scheduler or the new tasks side panel option. Visit our [Appointment Tasks Help Articles](#) for more information on adding and managing appointment tasks.

The screenshot displays the 'Appointment' form in a software interface. At the top, there are buttons for 'Save', 'Close', 'Print', 'Eligibility', 'Activity', 'View All Appointments', 'Show History', and a 'More' dropdown. Below these are tabs for 'Appointment', 'Patient', and 'Payment'. The 'Appointment' tab is active, showing patient information 'TEST, JOHNNY (33397993)' and appointment details: Date '06/20/2025', Time '03:00 PM', Length '30 Minutes'. There is an 'Appointment Reminder' section with a checkbox 'Allow appointment to overbook with another appointment' and a dropdown for 'Appt Status' set to 'Rescheduled'. Other fields include 'Appt Type' (CAT CHECK), 'Resource' ([PC] CHEN, PAUL MD), 'Facility' (NORTH COUNTY LASER EYE ASSOC.), and 'Office Location' (NORTH COUNTY LASER EYE ASSOCIATES, APC). A 'Chief Complaint' field and a 'Repeat appointment every' dropdown are also present. A 'Comment' field contains the text '6mon cat iop JL 12/20/24'. On the right side, a sidebar menu includes 'Account Summary', 'Estimate', 'Notes', 'Appointments', 'Alerts', and 'Tasks'. The 'Tasks' section is expanded, showing a '+ Create Task' button and a 'Show Completed Tasks' checkbox.

Tasks From Claim Control

We added new Task Options within the Claim Control screen, allowing users to create and manage tasks associated with specific claims. This new option allows users to create and link tasks to multiple claims at once, as well as reassign and delete them simply by checking them off. For more info on creating tasks from Claim Control, visit our [Claim Control Task Options Help Article](#).

The screenshot shows the 'Claim Control' interface with a table of claims. The table has columns for 'Claim #', 'DOS', 'Current Payer', 'Patient', 'Review Status', 'First Billed Date', 'Last Billed Date', and 'Charge Amount'. A 'Task Options' dropdown menu is open, showing 'Create Task', 'Reassign Task', and 'Delete Task' options. The table contains several rows of claim data, including dates like 05/21/2025, 05/28/2025, 06/02/2025, 06/03/2025, 06/04/2025, and 06/10/2025, and payers like 'PRIORITY HEALTH MEDICARE (Primary)', 'MCLAREN HEALTH PLAN MEDICAID (Primary)', 'UHC MEDICARE DUAL COMPLETE SPECIAL NEEDS (Pr...', 'PRIORITY HEALTH OF MICHIGAN - PRIMARY (Primary)', 'MICHIGAN MEDICARE (Primary)', and 'UNITED HEALTHCARE (Primary)'. The 'Review Status' column shows 'No Issues Found' for all entries.

Claim #	DOS	Current Payer	Patient	Review Status	First Billed Date	Last Billed Date	Charge Amount
	05/21/2025	PRIORITY HEALTH MEDICARE (Primary)	REDACTED	No Issues Found	06/09/2025	06/09/2025	\$195.00
	05/28/2025	PRIORITY HEALTH MEDICARE (Primary)	REDACTED	No Issues Found	06/09/2025	06/09/2025	\$195.00
	06/02/2025	MCLAREN HEALTH PLAN MEDICAID (Primary)	REDACTED	No Issues Found	06/10/2025	06/10/2025	\$98.00
	06/03/2025	UHC MEDICARE DUAL COMPLETE SPECIAL NEEDS (Pr...	REDACTED	No Issues Found	06/09/2025	06/09/2025	\$195.00
	06/04/2025	PRIORITY HEALTH OF MICHIGAN - PRIMARY (Primary)	REDACTED, REDACTED REDACTED	No Issues Found	06/10/2025	06/10/2025	\$140.00
	06/04/2025	MICHIGAN MEDICARE (Primary)	REDACTED, REDACTED REDACTED	No Issues Found	06/10/2025	06/10/2025	\$140.00
	06/04/2025	UNITED HEALTHCARE (Primary)	REDACTED, REDACTED REDACTED	No Issues Found	06/10/2025	06/10/2025	\$195.00

Tasks From Claim Tracker

We also added new Task Options within the Claim Tracker screen, allowing users to create, manage, reassign, and delete tasks associated with specific claims simply by checking them off. Tasks can also be linked to multiple claims simultaneously. Visit our [Claim Tracker Task Options Help Article](#) for more information.

Group By		Task Options		Close		View Applied Filters		Expand	
(No Selection)									
Claim # / TCN	DOS / Status Date	Current Claim Status		Claim Amount / Billed Amount		Payer		Payer ID	
<input type="checkbox"/>	06/10/2025	Submitted electronically							
<input type="checkbox"/>	06/10/2025	SENT TO CLEARINGHOUSE (BATCH)							
<input type="checkbox"/>	06/11/2025	Acknowledgement/Receipt-The claim/encounter has been received. This does not mean that the claim has been ...							
<input type="checkbox"/>	06/11/2025	Acknowledgement/Receipt-The claim/encounter has been received. This does not mean that the claim has been ...							
<input type="checkbox"/>	06/11/2025	Claim/encounter has been forwarded to Payer.							
<input type="checkbox"/>	06/11/2025	Accepted for processing.							
<input type="checkbox"/>	06/12/2025	Acknowledgement/Receipt-The claim/encounter has been received. This does not mean that the claim has been ...							
<input type="checkbox"/>	06/12/2025	Payer - Accepted for processing.							
<input type="checkbox"/>	06/12/2025	Category Acknowledgement/Receipt-The claim/encounter has been received.This does not mean that the claim h...							
<input type="checkbox"/>	06/12/2025								

New Enhanced Auditing (Show History) for Contracts

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

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

Contracts

✓ Save
✕ Close
📄 Export
🕒 Show History

Name

BLUE CROSS AND BLUE SHIELD OF FLORIDA

☐ Make this contract inactive

Type

FFS

☒ Allow users posting payments to update prices

Sequence #

10031099

↑ ↓

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

These new auditing records are also included in our existing User Audit Report, making it an even stronger tool for auditing multiple records simultaneously. The Show History capability will be systematically added to other sections of the application. For more information visit our [Enhanced Auditing \(Show History\) Help article](#).

Enhancements

Net Amount now Available in Activity Report

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

set) whenever creating a new Payment Plan?

☒ Yes ☐ No

Show an alert when opening patient records for patients older than 65?

☐ Yes ☒ No

Display an option in the Patient screen to copy the patient's default Facility as their primary address? (This can be useful for practices that work directly with nursing homes and other residential treatment facilities.)

☐ Yes ☒ No

Show whether a claim is professional or institutional in the Patient Activity?

☐ Yes ☒ No

Show the Net Amount and balance (based on the allowed or contracted amount) in Patient Activity?

☒ Yes ☐ No

Set margins to use when printing the addresses on the Enhanced Statement payment slip.

i Changes to these margins will only adjust that that address.
Each unit represents 1/72 of an inch.

Return Address label:

Left Margin Top Margin

Patient Address label:

Left Margin Top Margin

This option was added to allow users to view claims on a net basis. When this option is selected, the Balance column will no longer be displayed. Instead, users can utilize the Net Amount and Net Balance columns to see 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
9212	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	\$138.99
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	\$0.00
Claim Totals					\$458.00	\$138.99	\$0.00	\$0.00	\$138.99

For more info on enabling this setting, visit our [Configure Patient Settings Help Article](#).

New Incremental Data Snapshots

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

✓ Patient Payment Portal

✓ Enhanced User Print Statement

✓ Claim Attachments

✓ Intake Forms

Add-On Services

Manage the per transaction

✓

✓

✓

✓

✗

✗

✓

Recurring Data Snapshot for Account #462134 - CollaborateMD

Usage of this feature will result in additional charges to your invoice. [Click here](#) for complete pricing information.

☒ Enable recurring (daily) data snapshots

Format

MySQL

Download Sample

Incremental Snapshot

Click Here

for important information about incremental snapshots.

Incremental snapshots include data that is new or changed since the last recurring snapshot. Customers who do not have a recent recurring snapshot will receive a full snapshot first, and then subsequent days will be incremental.

If you select One Combined File below and add any customer who hasn't recently received a recurring data snapshot, the first recurring snapshot after your change will be a full snapshot. Subsequent snapshots will be incremental.

Not all tables are delivered as an incremental snapshot. The following tables only include incremental data. All other tables contain complete data.

• Patient

• Claim

• IClaim

• Claim ICD Code

• Charge

• Credit

• Activity

IMGEAR TRAINING 1

UNT

UNT

ACCOUNT

ST ACCOUNT

ACCOUNT

Save

Cancel

New Aggregation of Text Columns on Reports

We updated the Report Builder to allow aggregations of text columns (in addition to numeric and date) into List, Unique List, Count, and Count Unique. This allows users to create reports detailing payment information, such as a list of payers for a specific claim, a report of all remittance codes, or a summary of distinct 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 Name

Credit Payer

Add Data Group

Groups

1 - Charge Pri

1 - Facility Name/ID

1 - Provider Name/ID

Filters

Charge CPT Code

Charge Entered Date

Charge Facility ID

Charge From Date

Charge Practice ID

Charge Primary Payer

Charge Primary Payer Type

Rendering Provider ID

ev Code

Debit Entered User

Customer Field

Change name

Aggregation

Display totals

Hide column

Copy Seqno

None

List

Unique List

Count All

Count Unique