

# Release 15.14.0 - July 21, 2025

Modified on 07/17/2025 6:17 pm EDT

## New features | Enhancements

### Highlights

#### New Features

- Diagnosis Code Default Procedures
- New Task Automation For Appointment Cancellation
- New Basic Appeal & Timely Filing Letters

#### Enhancements

- Copay Max Increased
- New Eligibility Report Fields

### New features

#### Diagnosis Code Default Procedures

We added the ability to automate procedure codes based on diagnosis codes, particularly for diagnoses that consistently require a specific procedure. When set, if a claim is created or a diagnosis code is manually entered, the corresponding procedure code will automatically populate as a charge line item. This new feature allows users to assign up to six default procedure codes per diagnosis code. For more information, visit our [Add a Diagnosis Code Help Article](#)

✓ Save

✕ Close

Show History

Code

M25.562

Code Type

ICD-10

☐ Make this code inactive

Description

PAIN IN LEFT KNEE

Effective Date

Termination Date

Default Procedure Codes

CPT #1

CPT #2

CPT #3

CPT #4

CPT #5

CPT #6

Superbill Options

☐ Print code on Superbill

Superbill description

Alerts

+ Add Alert

#### New Task Automation for Appointment Cancellation

We recently added a new Task Automation tab allowing customers to configure their practice to automatically create a new task for any payment failures during the daily AutoPay process. In this release, we are expanding this tab to include a new task automation option to *Create a task when a patient cancels their appointment via appointment reminder*. When a patient cancels an appointment via an appointment reminder, a user or group can receive an automated task notification, enabling them to immediately fill the slot with another patient. Visit our [Task Automations](#) Help Article for more info on setting up this automation.

> Notes

> Other Offices

> Options

✓ Task Automations

☒ Create a task when a patient cancels their appointment via appointment reminder

Assign appointment task to

DANIEL GOLDSMITH (danielgoldsmith) X

Select User

☐ Create a task when a patient's AutoPay payment fails

## New Basic Appeal & Timely Filing Letters

Previously, users needed to create their own appeal and timely filing letters when they needed to provide those letters to payers. In this release, we added the ability for users to print timely filing and appeal letters directly from the Claim, Claim Tracker, and Claim Follow Up sections of the application. This allows customers to print basic appeal and timely filing letters for payers who don't have their own required format.

### Printing Letter From the Claim Section



## Printing Letter From the Claim Tracker Section

Group By		(No Selection) ▼		Task Options ▼	Close	View Applied Filters	↑ ↓
<input type="checkbox"/> Claim # / TCN	DOS / Status Date	Patient / Status		Current Claim Status		Claim Amount / Billed Amount	Payer
<input type="checkbox"/> 239709883	10/17/2024	REDACTED, REDACTED (#60866578)		REJECTED AT CLEARINGHOUSE		\$24.00	
<input type="checkbox"/> 239709911	11/17/2024	REDACTED, REDACTED (#60866578)		REJECTED AT CLEARINGHOUSE		\$24.00	
<input type="checkbox"/> 239709982	12/17/2024	REDACTED, REDACTED (#60866578)		REJECTED AT CLEARINGHOUSE		\$24.00	
<input type="checkbox"/> 240651263	07/01/2025	REDACTED, REDACTED (#60993345)		CLAIM AT HUMANA MEDICARE		\$24.00	
<input type="checkbox"/> 240673201	07/02/2025	REDACTED, REDACTED (#60995967)		CLAIM AT TEXAS MEDICARE D...		\$24.00	
<input type="checkbox"/> 240700728	07/02/2025	REDACTED, REDACTED (#60999248)		CLAIM AT MEDICARE DMERC R...		\$24.00	
<input type="checkbox"/> 240712109	07/02/2025	REDACTED, REDACTED (#29558550)		CLAIM AT TRICARE - EAST REG...		\$24.00	
<input type="checkbox"/> 240806484	07/02/2025	REDACTED, REDACTED (#61026356)		CLAIM AT UNITED HEALTHCARE		\$24.00	
<input type="checkbox"/> 240828854	07/02/2025	REDACTED, REDACTED (#61002552)		CLAIM AT UNITED HEALTHCAR...		\$24.00	
<input type="checkbox"/> 241117534	07/02/2025	REDACTED, REDACTED (#61072615)		CLAIM AT TRICARE - EAST REG...		\$24.00	
<input type="checkbox"/> 242446777	07/02/2025	REDACTED, REDACTED (#61397274)		CLAIM AT UNITED HEALTHCAR...		\$24.00	
<input type="checkbox"/> 1355	Copy	tated electronically				\$24.00	UNITED HEALTHCARE
<input type="checkbox"/>	Open Patient	:INT TO CLEARINGHOUSE (BATCH)					
<input type="checkbox"/>	Open Claim	:knowledge/Receipt-The claim/encounter has been received. This does not mean that the claim has been ...					
<input type="checkbox"/>	Create Task	:knowledge/Receipt-The claim/encounter has been received. This does not mean that the claim has been ...					
<input type="checkbox"/>	Find Payer Batch Reports	:knowledge/Receipt-The claim/encounter has been received. This does not mean that the claim has been ...					
<input type="checkbox"/>	View Claim	aim/encounter has been forwarded to Payer.					
<input type="checkbox"/>	Print Proof of Timely Filing Letter	ayer - Accepted for processing.					
<input type="checkbox"/>	Print Appeal Letter	ity acknowledges receipt of claim/encounter.					
<input type="checkbox"/>		ayer acknowledges receipt of claim/encounter.					
<input type="checkbox"/> 242560887	07/02/2025	REDACTED, REDACTED (#61412129)		CLAIM AT ULTIMATE HEALTH P...		\$24.00	
<input type="checkbox"/> 242599610	02/23/2025	REDACTED, REDACTED (#61417204)		CLAIM AT WELLMED		\$24.00	
<input type="checkbox"/> 242599662	03/23/2025	REDACTED, REDACTED (#61417204)		CLAIM AT WELLMED		\$24.00	

### Knowledge base articles

- [Print Proof of Timely Filing Letter from Claim Help Article](#)
- [Print Appeal Letter From Claim Help Article](#)
- [Print Proof of Timely Filing Letter From Follow Up Help Article](#)
- [Print Appeal Letter From Follow Up Help Article](#)
- [Track a Claim Help Article](#)
- [Proof of Timely Filing Letter Sample](#)
- [Appeal Letter Sample](#)

## Enhancements

### Copay Max Increased

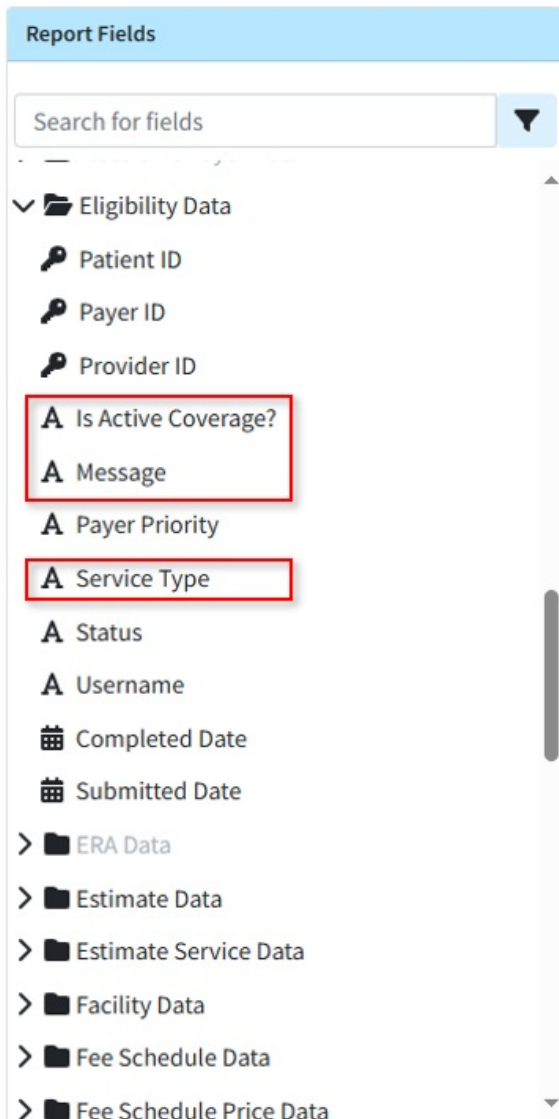
As healthcare costs increase, more costs are being shifted to the patient. Previously, the Copay field allowed up to \$999.99, which is generally sufficient for professional services but not for inpatient hospital or maternity copays. (Typically, plans use a coinsurance model for hospital claims, but not all plans do this.) Since the insurance policies table already has a limit of \$9,999.99 (based on being a numeric(6,4) column), we expanded the width of the in-app copay fields in the patient section to allow entering values of up to 9,999.99.

### New Eligibility Report Fields

In this release, we added the following Eligibility Data report fields for better reporting on Eligibility

requests:

1. **Is Active Coverage?** - This field displays if there is active coverage based on the Eligibility.Active field uses Yes or No filter values.
2. **Message** - (text field) This field displays any eligibility messages (error messages).
3. **Service Type** - (filter values are full name) This field displays the service type with values as the full name (i.e., "Medical Care" rather than the code "01") based on the Eligibility.Servicetype field.



Visit our [Eligibility Data Help Article](#) for more information on the new report fields.

## Estimates Automation (Charge Detail)

We updated patient estimates for appointments to no longer require re-entering charge details when creating a new estimate for an appointment that already has one. The charge details that were previously entered are now shown by default, eliminating the need for users to re-enter them.

## Report Performance Enhancement

We added performance improvements of several reports including the Rev. Claims Billed Charges Report

and the Claim Details Report (particularly the Charge Last Billed Date filter) to minimize slowness when running these reports.

## Show HL7 Location for Users

A new checkbox was added to the bottom left of the **View Message** Interface Tracker dialog to display the HL7 location. This checkbox will only be shown for HL7 messages and when checked, the HL7 segment location will be displayed to the user (previously only available with Engineering permissions).

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