

# Release 15.15.0 - August 4, 2025

Modified on 08/04/2025 12:51 pm EDT

## New features | Enhancements

### Highlights

#### New Features

- Task Management for Statements
- New Post Only Payment Permission
- New Payer-Level Authorization Billing Alert

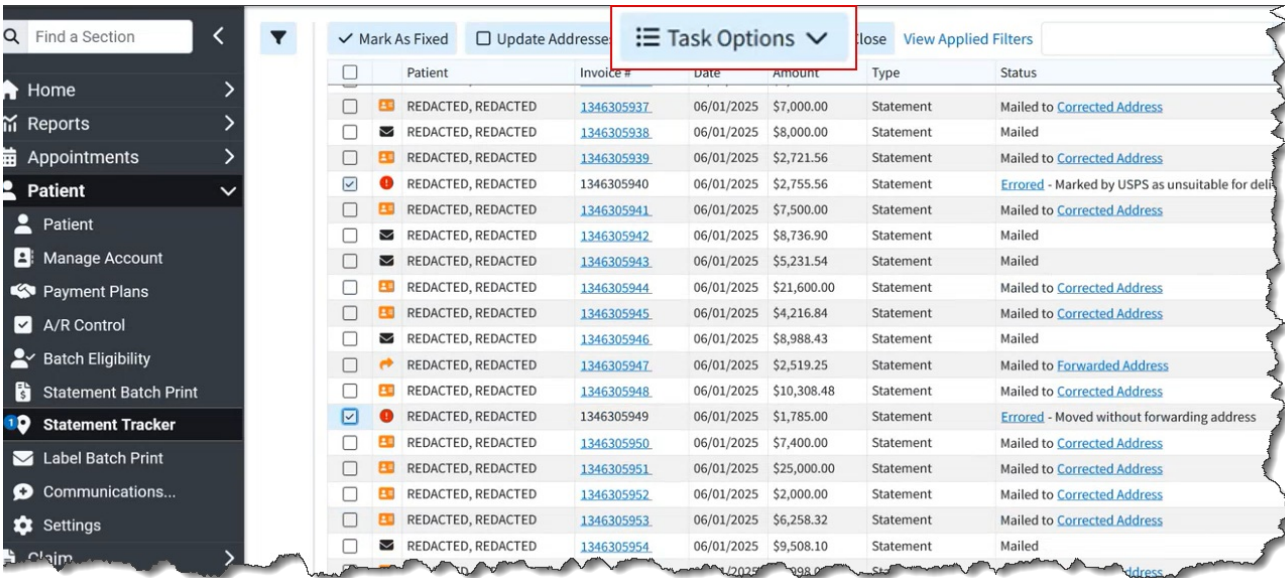
#### Enhancements

- AR Aging By Net Amount
- New Electronic Statements Report Fields

## New features

### Task Management for Statement Tracker

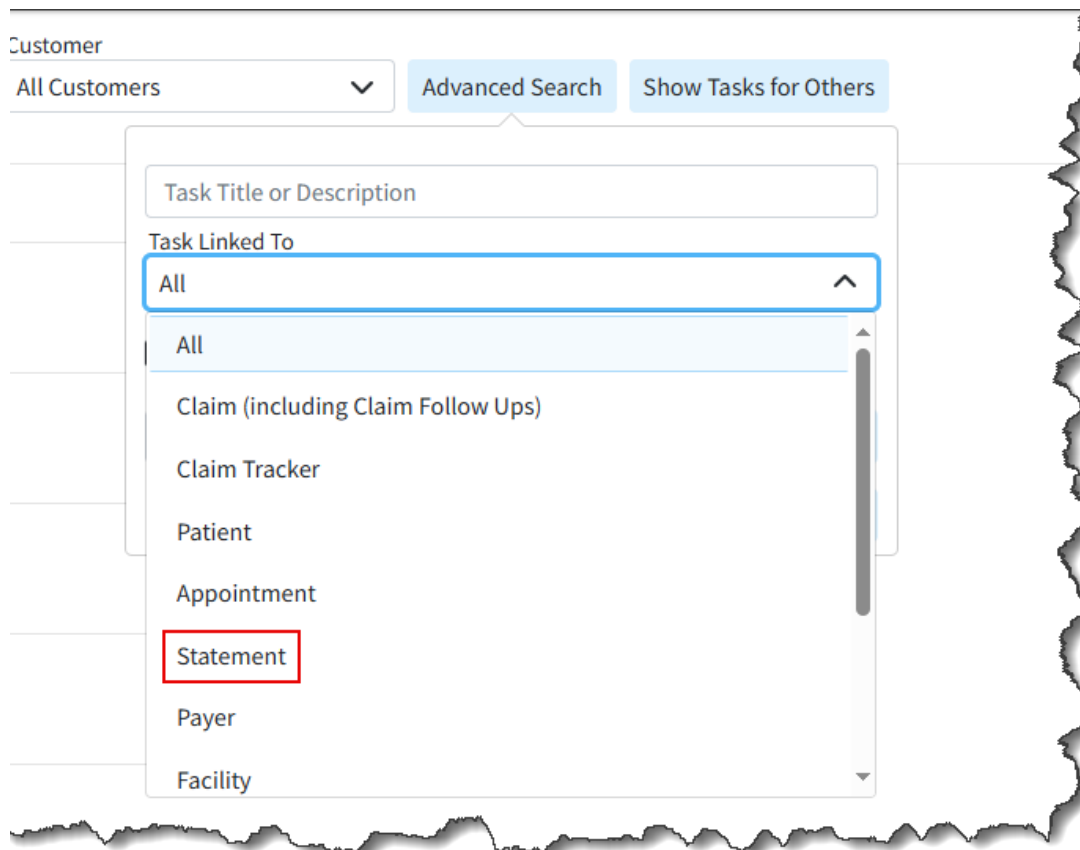
As part of our Task workflow improvements project, we added the ability for users to create and manage Patient Tasks based on specific statements within Statement Tracker. Similar to previous enhancements that added tasks to Claim Tracker, Claim Control, and Follow-Up Management, this enhancement allows customers to track statements requiring attention. These tasks include due dates, links, descriptions, statuses, and priorities, and can be assigned to individuals or specific user groups within your organization. Please note that some task management options are exclusive to Plan 3 and above. For more information, visit our [Add a Diagnosis Code Help Article](#)



The screenshot displays the 'Statement Tracker' section of a software interface. On the left is a navigation sidebar with options like Home, Reports, Appointments, Patient, Manage Account, Payment Plans, A/R Control, Batch Eligibility, Statement Batch Print, Statement Tracker (selected), Label Batch Print, Communications..., and Settings. The main area shows a table of statements. A red box highlights the 'Task Options' menu in the top toolbar, which also includes 'Mark As Fixed', 'Update Address', and 'View Applied Filters'. The table has columns for Patient, Invoice #, Date, Amount, Type, and Status. The status column contains various messages like 'Mailed to Corrected Address', 'Errored - Marked by USPS as unsuitable for delivery', and 'Errored - Moved without forwarding address'.

	Patient	Invoice #	Date	Amount	Type	Status
<input type="checkbox"/>	REDACTED, REDACTED	1346305937	06/01/2025	\$7,000.00	Statement	Mailed to <a href="#">Corrected Address</a>
<input type="checkbox"/>	REDACTED, REDACTED	1346305938	06/01/2025	\$8,000.00	Statement	Mailed
<input type="checkbox"/>	REDACTED, REDACTED	1346305939	06/01/2025	\$2,721.56	Statement	Mailed to <a href="#">Corrected Address</a>
<input checked="" type="checkbox"/>	REDACTED, REDACTED	1346305940	06/01/2025	\$2,755.56	Statement	Errored - Marked by USPS as unsuitable for delivery
<input type="checkbox"/>	REDACTED, REDACTED	1346305941	06/01/2025	\$7,500.00	Statement	Mailed to <a href="#">Corrected Address</a>
<input type="checkbox"/>	REDACTED, REDACTED	1346305942	06/01/2025	\$8,736.90	Statement	Mailed
<input type="checkbox"/>	REDACTED, REDACTED	1346305943	06/01/2025	\$5,231.54	Statement	Mailed
<input type="checkbox"/>	REDACTED, REDACTED	1346305944	06/01/2025	\$21,600.00	Statement	Mailed to <a href="#">Corrected Address</a>
<input type="checkbox"/>	REDACTED, REDACTED	1346305945	06/01/2025	\$4,216.84	Statement	Mailed to <a href="#">Corrected Address</a>
<input type="checkbox"/>	REDACTED, REDACTED	1346305946	06/01/2025	\$8,988.43	Statement	Mailed
<input type="checkbox"/>	REDACTED, REDACTED	1346305947	06/01/2025	\$2,519.25	Statement	Mailed to <a href="#">Forwarded Address</a>
<input type="checkbox"/>	REDACTED, REDACTED	1346305948	06/01/2025	\$10,308.48	Statement	Mailed to <a href="#">Corrected Address</a>
<input checked="" type="checkbox"/>	REDACTED, REDACTED	1346305949	06/01/2025	\$1,785.00	Statement	Errored - Moved without forwarding address
<input type="checkbox"/>	REDACTED, REDACTED	1346305950	06/01/2025	\$7,400.00	Statement	Mailed to <a href="#">Corrected Address</a>
<input type="checkbox"/>	REDACTED, REDACTED	1346305951	06/01/2025	\$25,000.00	Statement	Mailed to <a href="#">Corrected Address</a>
<input type="checkbox"/>	REDACTED, REDACTED	1346305952	06/01/2025	\$2,000.00	Statement	Mailed to <a href="#">Corrected Address</a>
<input type="checkbox"/>	REDACTED, REDACTED	1346305953	06/01/2025	\$6,258.32	Statement	Mailed to <a href="#">Corrected Address</a>
<input type="checkbox"/>	REDACTED, REDACTED	1346305954	06/01/2025	\$9,508.10	Statement	Mailed

We also added a new "Statement" Task Type that allows users to specifically search for statement tasks. For more information, visit our [Statement Tracker Task Options Help Article](#)



## New "Post Only" Payment Permission

Some larger practices or billing services allow certain users to collect patient payments but want to restrict their ability to choose which charges to apply them to. In this release, we added a new **"Post Only"** level to the existing **Patient Payments** permission, that will allow the user to post new payments as credits but will prevent them from being able to apply payments, account credits, discounts, or credit/debit adjustments. We also renamed the existing **"Allow"** level for this permission to **"Apply"** which will still allow users to post patient payments and apply discounts, credit/debit adjustments, and account credits.

Permissions

COLLABORATEMD

☐ Assign to an existing permission role

Select a role

☒ Set custom permissions

Search for permissions

Select Category to View Permissions

Payment

☐ Show Permission Descriptions

Patient Payments	Post Only	
Insurance Payments	Deny	
ERA Auto Apply	Post Only	
ERA File (835) Download	Deny	
ERA Upload	Deny	
Patient Activity	Deny	
Tracking	Deny	
Hard Close	Deny	

> Customer Access

> Access Hours

> Department Access

## New Payer-Level Authorization Billing Alert

We previously added code-level authorization alerts to set a prior authorization requirement as a default for the code. On this release, we added the ability to add payer-level authorization alerts, which will help users ensure claims have the proper authorization information before submission. The new *Require prior authorization for this payer* option will set the requirement for all claims that have that payer set as primary.

> Clearinghouse Connection

> Notes

> Alerts

> Tasks

Billing Options

General

Provider

Patient

ERA

☐ Automatically set Follow Up Date when billing to this payer

☐ Require prior authorization for this payer

☐ Use the provider name as the pay-to name

☐ Only send the pay-to address

☐ Use the office address as the pay-to address

☐ Print CMS-1500 as NY Workers' Compensation Form (C-4, C-4.2, C-4.3, or OT/PT-4)

☐ Override billing provider with rendering provider

Professional

Default POS

Q

Default Claim Note

When the new payer level option is enabled, a warning will be issued during the claim review since a pre-authorization is required and no authorization number is set on a claim. For more information visit our [General Billing Options Help Article](#).

Results

×

Claim reviewed for Billing Alerts. An issue was found.

The following payers or procedures require prior authorization:

• Payer AETNA (#10564976).

⚠

Claim not analyzed by CollaborateMD Edits.

⚠

Claim not processed by the code scrubbing engine because the service is not turned on.

JOB ID: N/A

i

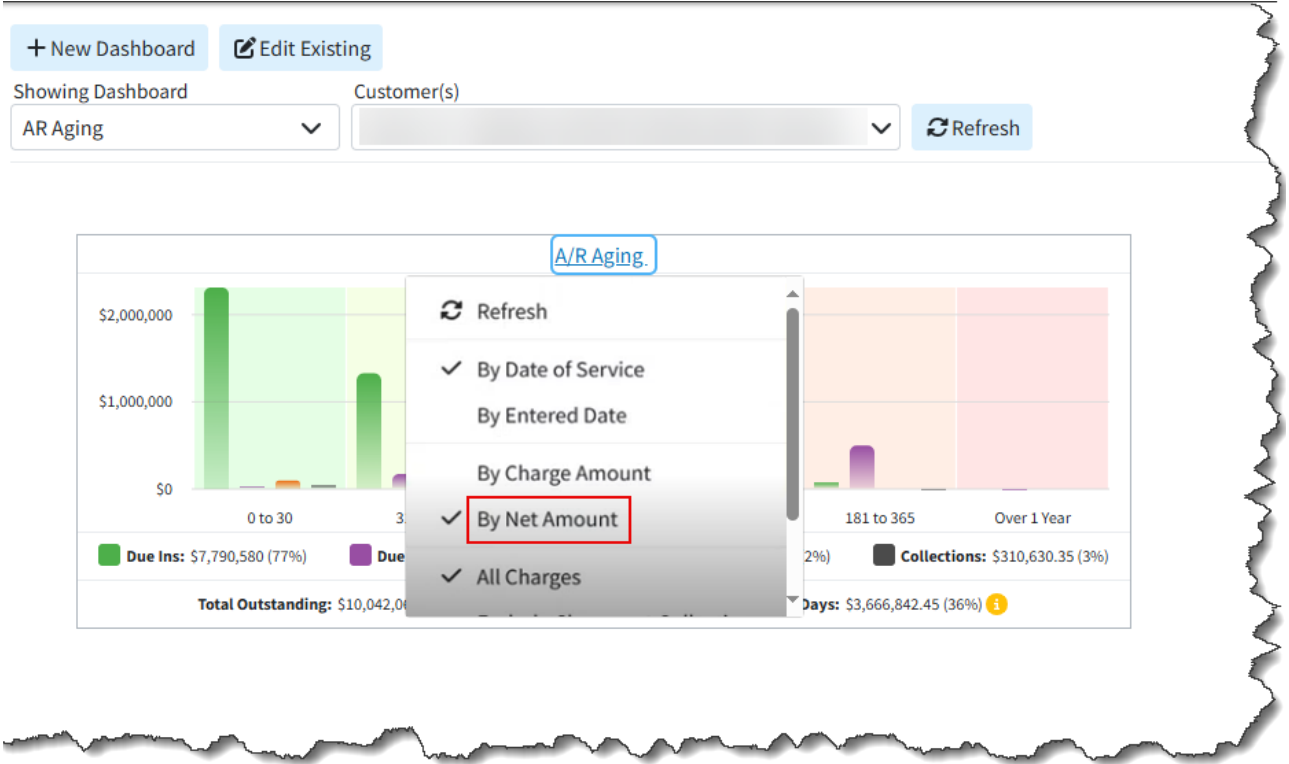
The claim was not analyzed by Clearinghouse Edits.

Either this claim has no charges set to send to the clearinghouse or Real-Time Claim Submission is not enabled.

# Enhancements

## A/R Aging By Net Amount

We added a new option within the A/R Aging Gadget that allows users to see A/R by Net Amount (expected payment) received from the payer instead of charge amount. This option will show the expected revenue before any insurance adjustments. For more info, visit our [AR Aging Gadget Help Article](#).



Drilling down to the Charge Aging Report from the gadget now also allows you to add columns to your report for Charge Net Amount and Charge Net Balance.

Select Columns

Available Columns

Charge Net Amount +

Charge Total Transfers +

Total Payments & Transfers +

Charge Net Balance +

Visible Columns

Patient ID

Patient Full Name

Charge Claim ID

Charge Entered Date

Done

## New Electronic Statements Report Fields

We added 2 new report fields under **Patient Data > Electronic Statements** for Patient Email Address and Patient Phone Number that allow users to report on where patients are set to receive their electronic statements. Visit our [Electronic Statements Report Fields Help Article](#) for more information.

Report Fields

Search for fields

✓ Electronic Statements

A Email Address

A Phone Number

> Emergency Contact

> Flexeon - Custom

> Guarantor

> Miscellaneous Info

> Payment Portal

> Primary Insured (Default)

> Primary Payer (Default)

