

Release 15.17.0 - September 2, 2025

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New features | Enhancements

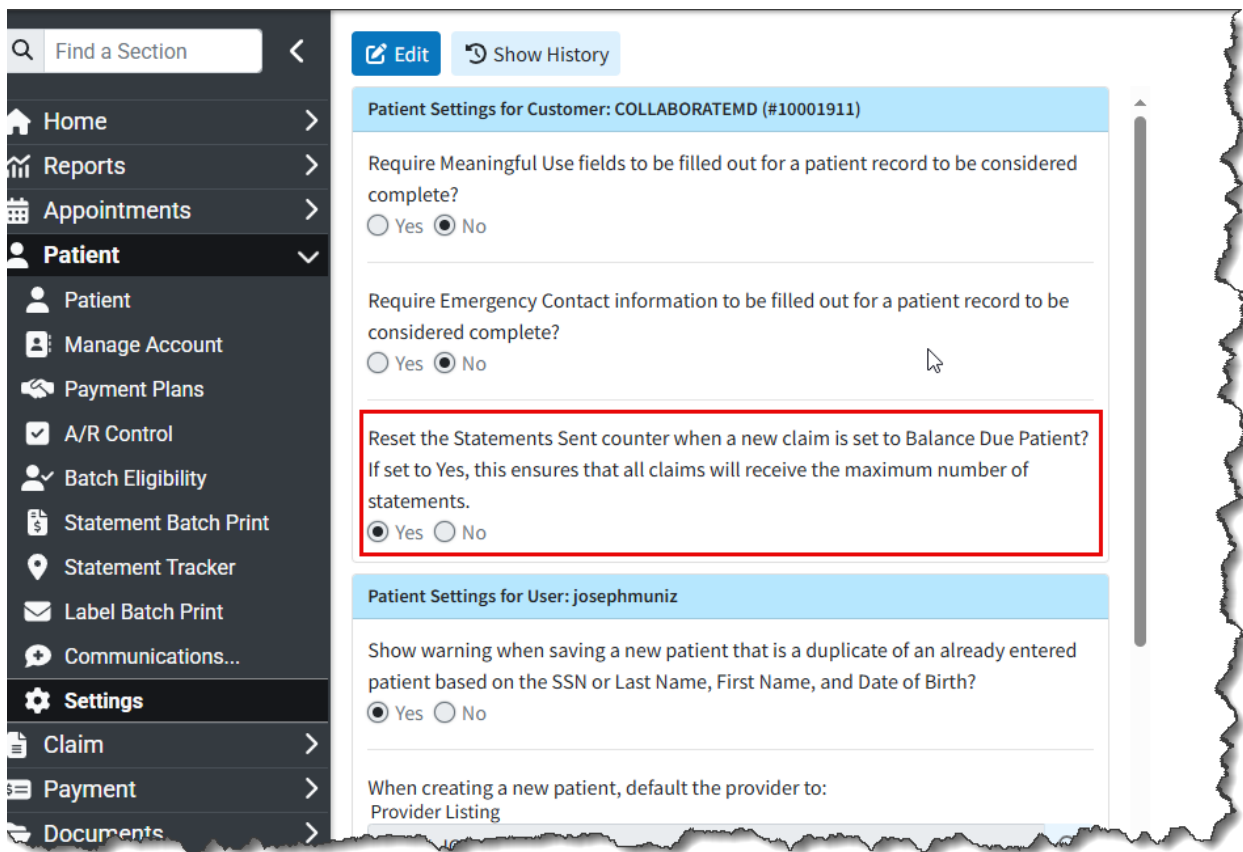
Highlights

New Features	Enhancements
New Statement Option for Continuing Visits	"Tracking" Tasks Enhancement
New "Card on File" Indicator when Posting Payments	
ANSI (837) Import via WebAPI	

New features

New Statement Option for Continuing Visits

CollaborateMD's Statement Automation has always allowed setting a maximum number of statements threshold, ensuring patients receive one only if their statement count is below this limit. However, this was not very effective for institutional inpatient, long-term care, or physical therapy settings, where numerous claims are billed in a short period of time. Consequently, if a patient failed to pay initial claims, they would not receive statements for subsequent ones. To accommodate these use cases, we added a new setting that will reset the "Number of Statements Sent" counter when a balance is newly set to "Due Patient." When set to "Yes," this new patient setting will reset the patient's "Statements Sent" counter to 0 when a claim is changed from another status to "Balance Due Patient" for the first time. For more information, visit our [Configure Patient Settings for Customer Help Article](#).



New "Card on File" Indicator when Posting Payments

We added a new indicator to show if a patient has a credit card on file when using the In-App Payment processing feature. If the "save payment information for next time" checkbox is selected, users will see the saved card(s) at the bottom of the payment screen. This is viewable when posting a payment from the Payment Post, Claim Payment tab, or Appointment Scheduler Payment tab.

New Payment

Credit Account (Apply Later)

Apply Automatically

Apply Manually

Clear Payment

☒ Patient Payment
 ☐ Insurance Payment

Patient

MCCLLOUD, FOX (25017512)

x

Q

Payment Amount

20.00

☐ Send Receipt

Received/Check Date

08/27/2025

Deposit Date

08/27/2025

Check #

Type

☐ Copay
 ☒ Payment

Source

☐ Check
 ☐ Cash

☒ Credit Card

Other

Merchant Account

SecOps Testing

Credit card information (card #, expiration date, etc) will be collected when saving the payment.

VISA

Credit Card is on file: Visa Card ending in 1111 (expires 5/26)

Memo

PATIENT PAYMENT - CREDIT CARD

ANSI (837) Import via WebAPI

We added the ability to import ANSI (837) files via new WebAPI endpoints, a feature previously exclusive to the Interface File Import. This enhancement also includes support for the "View Message Content" option within the interface tracker for ANSI 837 files from both API and File Import, enabling users to identify matching fields and better understand issues and errors.

The screenshot shows a web application interface with a table of messages. The table has columns for checkboxes, status icons, message text, timestamps, and claim types. A context menu is open over one of the 'Warning' messages, listing several actions. The 'View Message Content' option is highlighted with a red rectangle.

Checkbox	Status Icon	Message Text	Timestamp	Claim Type
<input checked="" type="checkbox"/>	Success		08/26/2025 08:08:33 PM	CLAIM
<input checked="" type="checkbox"/>	Success		08/26/2025 08:08:32 PM	CLAIM
<input type="checkbox"/>	Warning		08/26/2025 08:08:31 PM	CLAIM
<input type="checkbox"/>	Warning		08/26/2025 08:08:30 PM	CLAIM
<input type="checkbox"/>	Warning		08/26/2025 08:08:29 PM	CLAIM
<input type="checkbox"/>	Warning		08/26/2025 08:08:28 PM	CLAIM
<input type="checkbox"/>	Warning		08/26/2025 08:08:27 PM	CLAIM
<input type="checkbox"/>	Warning		08/26/2025 08:08:26 PM	CLAIM
<input type="checkbox"/>	Warning		08/26/2025 08:08:25 PM	CLAIM
<input type="checkbox"/>	Warning		08/26/2025 08:08:24 PM	CLAIM
<input type="checkbox"/>	Warning		08/26/2025 08:08:23 PM	CLAIM
<input type="checkbox"/>	Warning		08/26/2025 08:08:22 PM	CLAIM
<input type="checkbox"/>	Warning		08/26/2025 08:08:21 PM	CLAIM
<input type="checkbox"/>	Warning		08/26/2025 08:08:19 PM	CLAIM

Context Menu Options:

- Copy
- Mark as Fixed
- View Message Content**
- Open Patient
- Open Claim
- Open Appointment
- View Raw Message

or more information how to view the 837 message content, visit our [Retrieve Interface Messages Help article](#).

Enhancements

Tracking Tasks Enhancement

We recently added new task types for Statement Tracking and Claim Tracking. In this release, we updated the "Create Task" right-click option for consistency with task options in corresponding locations. These task types will now be used when creating tasks via the right-click option (this means that Claim Tracking now creates a claim tracking task & Statement Tracking now creates a statement task).

▶		239111944	07/16/2024	REDACTED, REDACTED (#37190993)	SEND TO AMERIC
▶		242777502	08/30/2024	REDACTED, REDACTED (#37190993)	SEND TO AMER
▼		246654189	10/18/2024	REDACTED, REDACTED (#62097812)	ON HOLD
▶		131		ed by user	
		129	Copy	: Submitted electronically	
		129	Open Patient	: Submitted electronically	
		128	Open Claim	: Submitted electronically	
		129	Create Task	: Submitted electronically	
		129	Find Payer Batch Reports	: Submitted electronically	
		128	View Claim	: Submitted electronically	
		129	Print Proof of Timely Filing Letter	: Submitted electronically	
		129	Print Appeal Letter	: Submitted electronically	
		1289531952	01/04/2025	(Test): Submitted electronically	
		1294928344	01/19/2025	(Test): Submitted electronically	
		1295365969	01/20/2025	(Test): Submitted electronically	

Appointment Text Improvements

Updated the appointment text messages so that when users click "Confirm" or "Cancel" it now requires an additional button press. This will prevent accidental confirmations or cancellations from text message reviews on some smartphones.
