

Release 15.19.0 - September 29, 2025

Updated Modified on 09/29/2025 12:09 pm EDT

New features | Enhancements

Highlights

New Features	Enhancements
New Onboarding Process for "In-App Credit Card Processing" (Beta Release)	Charge Totals now Visible from the Payment Plans EIN The Defaulted Option when Adding a New Provider

New features

New Onboarding Process for "In-App Credit Card Processing" (Beta Release)

Onboarding customers to our in-app payment processing feature was a time-consuming, multi-step process that required close collaboration between our Strategic Customer Success team, the customer, and GPI to submit customer information to GPI, secure approval, and integrate credentials into CMD. This limited the speed and ease with which new customers could sign up or existing customers could add new merchant accounts.

This release introduces a new process enabling customers to complete and sign their entire application within CMD without additional intervention. This streamlined workflow allows users to sign up and immediately fill out the application directly from the Services section, with auto-filled data from their office information. A new multi-step dialog screen facilitates entering all required information and provides status updates for pending applications within the IPP Settings.

Please note that this is a BETA (limited) release and will soon be available to all customers Visit our [Manage In-App Credit Card Processing](#) Help Article for more information.

In-App Credit Card Processing: New Merchant Account Request

Step 1: Location Information

SELECT THE PRACTICE TO ADD AS A MERCHANT

TEST PRACTICE (10021129)

x

Q

Office Location

TEST PRACTICE 5716 GRAND CANYON DR

▼

Location Contact Information

TEST PRACTICE
5716 GRAND CANYON DR
ORLANDO, FL 32810-5454
Phone: (659) 656-5989
**To make changes to the location information, go to the Practice Section*

Doing Business As (DBA) Name (if different)

Location Primary Contact

First Name

JOE

Last Name

TEST

Email Address

test@test.com

...

Cancel

Next

Enhancements

Charge Totals now Visible from the Payment Plans

Previously, the total charge balance was not included when viewing a payment plan. Ideally, this information should be available to visually match the total charge balance with the payment plan balance, ensuring all charges have been added. In this release, we added a column to the main Payment Plan screen displaying the total charges and total balance of charges to help users visually confirm that all charges have been included in the payment plan. We also added these two values to the "Edit Payment Plan" screen.

+ New Payment Plan

✕ Close

☰ Create Task

Current Payment Plan Balance:

\$241.90

Charge Balance Due Patient:

\$381.35

Next Installment Due Date:

09/26/2025

Charge Balance Due Insurance:

\$10360.61

Next Installment Amount:

\$

Payment Plan Listing

☐ Show Deleted Payment Plans

Previously

Payment Plan 01/26/2026 (Active)

✎ Edit

⋮ More

Amount: \$241.90

Create Date: 09/26/2025

Balance: \$241.90

Create User: josephmuniz

Installments

Due Date	Description	Amount	Balance	Status	Last Stmt Date
09/26/2025	Installment 1 of 5	\$48.38	\$48.38	Unpaid	
10/26/2025	Installment 2 of 5	\$48.38	\$48.38	Unpaid	
11/26/2025	Installment 3 of 5	\$48.38	\$48.38	Unpaid	
12/26/2025	Installment 4 of 5	\$48.38	\$48.38	Unpaid	
01/26/2026	Installment 5 of 5	\$48.38	\$48.38	Unpaid	

Charges

DOS	Claim #	CPT	Status	Amount	Balance
01/22/2020	134407986	008F	BALANCE DUE PATIENT	\$291.90	\$241.90

+ New Payment Plan

✕ Close

☰ Create Task

Current Payment Plan Balance:

\$241.90

Charge Balance Due Patient:

\$381.35

Next Installment Due Date:

09/26/2025

Charge Balance Due Insurance:

\$10360.61

Next Installment Amount:

\$

Payment Plan Listing

☐ Show Deleted Payment Plans

Now

Payment Plan 01/26/2026 (Active)

✎ Edit

⋮ More

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Balance: \$241.90

Charge Balance: \$241.90

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Installments

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01/26/2026	Installment 5 of 5	\$48.38	\$48.38	Unpaid	

Charges

DOS	Claim #	CPT	Status	Amount	Balance
01/22/2020	134407986	008F	PAID	\$291.90	\$241.90

IN The Defaulted Option when Adding a New Provider

When creating a new Provider (either in the Provider section or in the New Account Wizard), the "Use which ID number?" field previously defaulted to the SSN. However, most billing is now done under the EIN. In this release, we have set this field to default to "Employer Identification# (EIN)" in both the Provider section and the New Account Setup Wizard, as it is more commonly used than SSN billing.

✓ Save

✕ Cancel

⚙️ Configure Eligibility

Last

First

MI

Credentials

This provider is an:
☒ Individual
☐ Organization

NPI

🔍

Taxonomy Specialty

🔍

Sequence #

NEW

Reference #

Code

Billing Information

Practice for this provider

🔍

🏢

Bill claims under

SELF

🔍

Check eligibility under

SELF

🔍

Use which ID number?

Employer Identification# (EIN) ▼

Employer Identification # (EIN)

Bill as

Individual ▼

☐ Bill professional claims (CMS-1500)

☐ Bill institutional claim (CMS-1500)

New Patient # Column within Statement Tracker

A new column for "Patient #" has been added to Statement Tracker. This column will be hidden by default and can be accessed via the "Select Columns" option or the right-click "Select Columns" option. When added, this column will display the patient account number.

Select Columns

Available Columns	Visible Columns
Task Due Date +	Selected
Task Status +	Icon
Task Assign Date +	Patient
Task Assignee +	Invoice #
Patient # +	Date
	Amount

Done