

Release 16.0.0 -January 5, 2026

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Enhancements

Highlights

Enhancements

- New Referring Provider Note Report Field
- New Optional Columns in Claim Control & Follow Up Management
- ERA Claim-level Payments Now Evenly Applied

Enhancements

New Referring Provider Note Report Field

In this release, we added a new report field for the Referring Provider's Note text field. This new report field (available under Referring Data) is useful for recording various information. For example, users can note the name of the facility a referring provider is from, allowing them to report on the number of lab samples received from each facility.

✓ Save ▾ ✗ Cancel

| | | |
|---|--|-------------|
| Title | | Description |
| Category | | ▼ + |
| Report Fields | | Columns |
| Search for fields | | ▼ |
| <div style="border: 1px solid red; padding: 2px; display: inline-block;">Referring Note</div> | | |
| <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A City</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A Credentials</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A Email</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A Fax #</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A First Name</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A Full Name</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A Full Name w/ ID</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A Home Phone</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A Inactive?</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A Last Name</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A Marketer</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A Medicaid ID</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A Medicare ID</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A Middle Initial</div> <div style="border: 1px solid red; padding: 5px; margin-bottom: 5px;">A Note</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A NPI</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">A Pager</div> | | |
| <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Add Data Group</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Groups</div> <div style="border: 1px dashed #ccc; padding: 10px; text-align: center;">Drag & drop fields here to add report groups</div> | | |

New Optional Columns in Claim Control & Follow Up Management

Some customers use the **Account Type** and **Reference #** fields in CMD to store information that does not fit elsewhere in the application. While integrating fields for workflows across different specialties would be ideal, many customer issues can be resolved by allowing them to view this information in various places. In this release, we added these two columns as optional (not visible by default) in both Follow Up Management and Claim Control.

Select Columns

| Available Columns | Visible Columns |
|------------------------------|-----------------|
| Last Claim Status + Check | Checkbox |
| Insurance Payments + | Alerts |
| Patient Payments + | Claim # |
| Patient Account Type + | Patient Name |
| Patient Reference # + | DOS |
| | Current Payer |

Done

ERA Claim-level Payments are Now Evenly Applied

ome payers (particularly for institutional claims) send only a claim-level payment rather than line-item payments. Previously, our system applied these payments by distributing as much of the paid amount on each charge as possible, and then as much of the adjusted amount on each charge as possible, resulting in uneven claim application, and requiring users to manually correct the ERAs for institutional claims. With this release, these payments will now be applied evenly.

As part of this release, we are continuing our ongoing work to assess, monitor, and address any security vulnerabilities.