

Release 16.7.0 - April 14, 2026

Modified on 04/13/2026 3:06 pm EDT

New features | Enhancements | Resolutions

Highlights

New Features

New Total and Selected Patient Counts in Claim Control

Enhancements

Payment Automations UI Update
Universal Import UI Update

New features

New Total and Selected Patient Counts in Claim Control

We previously added the total and selected charges & claims to the bottom of the Claim Control results screen. In this release, we added "Total Patients" and "Selected Patients" counts to the Claim Control results screen. These fields display the total number of unique patients and, when claims are selected, the number of unique patients within that selection.

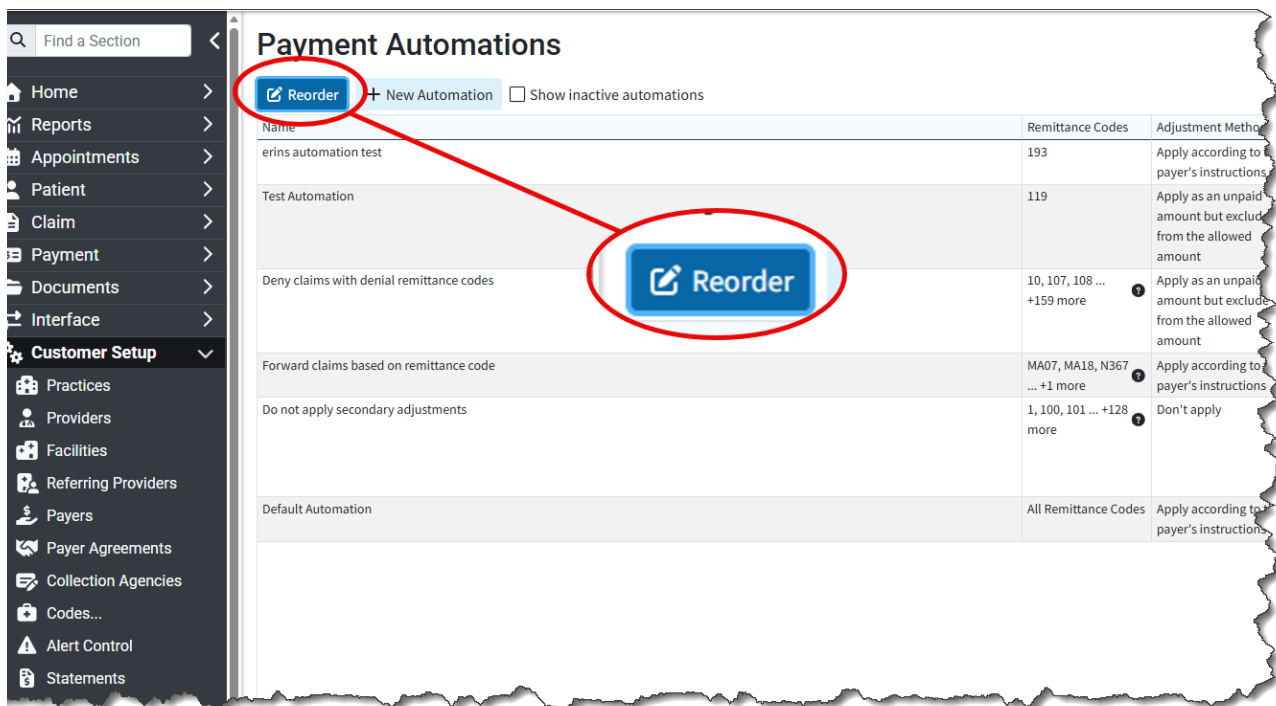
<input type="checkbox"/>	Claim #	DOS	Patient	Primary Payer	Review Status	To DOS	Claim Type	+
<input type="checkbox"/>	287775573	02/03/2026	KEYS, ALICIA	UNITED HEALTHCARE	✔ No Issues Fo...	02/03/2026	Professional	
<input type="checkbox"/>	287935059	02/05/2026	MUNIZ, JOSEPH	AMERICOHOICE OF NEW YORK INC. (MEDICAID NY)	✔ No Issues Fo...	02/05/2026	Professional	
<input checked="" type="checkbox"/>	291585791	03/12/2026	TEST, JOHNNY	BLUE CROSS AND BLUE SHIELD OF FLORIDA	✔ No Issues Fo...	03/12/2026	Professional	
<input checked="" type="checkbox"/>	291588187	03/12/2026	TEST, JOHNNY	BLUE CROSS AND BLUE SHIELD OF FLORIDA	✔ No Issues Fo...	03/12/2026	Professional	
<input checked="" type="checkbox"/>	293751412	04/10/2026	TEST, JOHNNY	BLUE CROSS AND BLUE SHIELD OF FLORIDA	✔ No Issues Fo...	04/10/2026	Professional	
<input checked="" type="checkbox"/>	293751413	04/10/2026	MUNIZ, JOSEPH	AMERICOHOICE OF NEW YORK INC. (MEDICAID NY)	✔ No Issues Fo...	04/10/2026	Professional	

Total Claims: 6 **Total Patients: 3** | Total Charges: \$844.00 | Selected Claims: 4 **Selected Patients: 2** | Selected Charges: \$576.00 Count: 1

Enhancements

Payment Automations UI Update

The "Edit" button previously located at the top of the payment automation screen was misleading. Rather than allowing users to modify specific automations, this button is used to reorder, activate, or deactivate them. To edit an individual automation, users must open the specific entry directly. To avoid confusion, in this release the "Edit" button within Payment Automations has been renamed "Reorder," as it is used to reorder, activate, or deactivate automations rather than edit them.



Improved Deposit Date Reporting

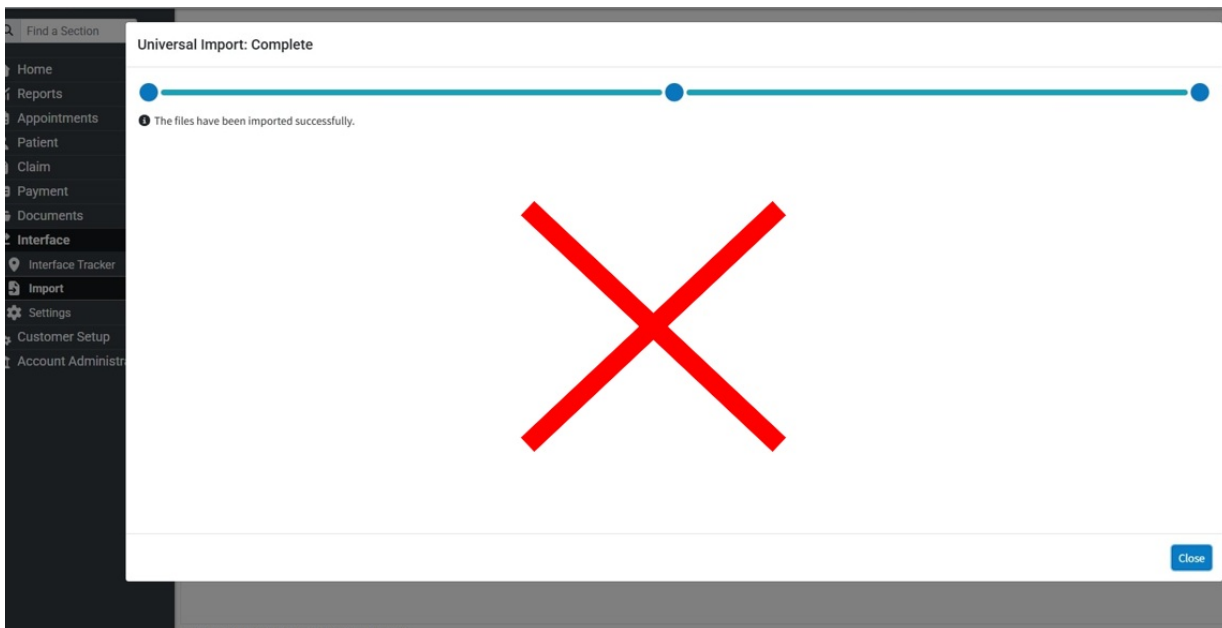
We have improved the performance of reports, such as the Daily Deposit Report, when filtering by deposit date. Previously, generating these reports for large accounts over extended periods was time-consuming. By adding an index to the Deposit Date field, we have matched the efficiency of reports filtered by receiver date, significantly increasing processing speed and preventing timeouts.

ERA Negative Adjustments

Previously, negative adjustments were not applied correctly to ERAs, resulting in inaccurate credits. This issue pertains to scenarios where a payer's payment and adjustment total exceeds the billed amount, adding a negative adjustment (not refunds/reversals). In this release, the system has been updated to correctly apply these negative adjustments for primary payers when claims are received with amounts intended to offset overpayments.

Universal Import UI Update

We made a minor update to the universal import process. Previously, after reviewing the field matching in the review screen and then selecting "import" the dialog remained open, requiring users to manually close it to see the option to review the results. With this update, the dialog now closes automatically, removing an extra step and streamlining the workflow.



Resolutions

Electronic Statements Issue

We resolved an issue where setting up electronic statements when the patient was already receiving paper statements, would occasionally receive both formats simultaneously, exceeding the established statement limit before an FDN. In this release, we updated the system so that enabling electronic statements for patients already receiving paper statements will not trigger electronic delivery for them. Electronic statements will now only be issued to patients who have not previously received paper statements. Once a patient pays and resets their balance, the process restarts: we will send electronic statements, followed by paper statements and the FDN.

Incomplete Claims Won't Appear in Follow-Up Management

The claim follow-up screen previously allowed users to retrieve incomplete claims and update their status to options such as "Send to Insurance." The problem is that incomplete claims cannot be submitted to insurance, and our system would block these attempts, causing processing issues. Since follow-up management is intended use is to handle claims already submitted, we have updated the system to exclude incomplete claims from this view. Instead, Incomplete claims should be searched within Claim Control, using the Incomplete Claims report, or a customized welcome screen. Once identified, resolve the issues within the claim or patient sections to ensure successful submission.

Interface Error With the Archive Insurance Option

We previously identified isolated interface errors that prevented claims from posting and patient records from updating. As a workaround, users were advised to temporarily disable the "archive patient insurance

Information" setting. This release resolves the issue, allowing users to re-enable this feature.

Universal Import Updates

We have enhanced our universal import feature to better process provider and patient names. The system now more accurately parses names when first, middle, and last names are contained within a single column regardless of formatting variations. During import, the AI will now more effectively match these entries in our file to the corresponding fields in CMD.

Invoice Email Update

We resolved an issue where users incorrectly received invoice emails after being reassigned from a custom permission to a "User Role" without the permission. The system had failed to clear the legacy permission, causing it to persist despite the role change not including it.

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