

Release 16.9.0 - May 11, 2026

Updated on 05/08/2026 5:12 pm EDT

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Highlights

New Features

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New features

Even More Universal Import Updates!


This release introduces further enhancements to the Universal Import feature, continuing to streamline the mapping of imported columns to CollaborateMD fields. Key updates include:


- **Recognizing institutional claims:** Previously, customers were required to include a claim type column in their imports to specify institutional claims. This necessitated manual intervention, as EHR exports typically lack this information. This release introduces support for importing institutional claims by automatically identifying them through specific data fields. Fields such as *Revenue Code*, *Value Code*, *Admit Type*, and *Condition Code* are now used to recognize institutional claims, eliminating the need for adding a manual claim type column.
- **Better Provider Name matching:** We have improved our provider name matching. Provider names often appear in a single column, sometimes accompanied by IDs or credentials. In this release, the system has been updated to ignore these extraneous details to accurately identify the first and last names for searching. While the system now effectively parses these columns, we still recommend maintaining a separate provider NPI column whenever possible.
- **Support for Different Modifiers for each charge:** The system has been updated to support distinct modifiers for individual charges. Previously, the system incorrectly consolidated all modifiers into a single list and applied it to every charge. This release ensures that imported files correctly match specific modifiers to their respective charges. Additionally, the system now treats "NA" or "N/A" values as blanks when multiple modifier codes are present.
- **Support for State's Full Name:** We have updated our address matching to support both full state names and two-digit abbreviations. The system now correctly processes EMR files regardless of whether the state is provided as a full name (e.g., Florida) or an abbreviation (e.g., FL).
- **Better Recognition of columns with duplicate or invalid values** We have updated the system to improve handling of multiple potential matches, such as when both rendering and provider NPIs are submitted. The system now clearly distinguishes between matched and unmatched entries. Previously, if one field matched, the other was omitted, which often caused confusion regarding the data imported.
- **Improvement when combining multiple rows into one claim:** Previously, the system consolidated rows for the same patient based solely on claim or appointment IDs. This often incorrectly merged records involving different providers or payers. Because distinct providers indicate separate services, these records must remain on individual claims. This update improves logic to prevent the improper

combination of claims.

- **Excel formatting now used for number columns:** When exporting member IDs starting with zeros to Excel, the application often removes the leading zeros, resulting in incorrect IDs and claim denials. In this release, we updated the Excel formatting for numeric columns to preserve leading zeros.
- **Support for Importing Patient's Marital Code:** Resolved an issue where patient marital status failed to import during data retrieval for meaningful use or other tracking purposes. This release ensures the information is now correctly imported.

Universal Import: Review



 If any data does not import correctly, please adjust column names in the imported file and try again

Patient	Provider	Facility	Payer	Charges	Unmatched Columns
Charge #1					
Header from File		CMD Field		Value from File	
DOS				Date of Service	01/26/2026
EDOS				End Date of Service	01/26/2026
Unit				Units	1.0
Fee				Unit Price	60
POS				Place of Service	20
ICD1, ICD2, ICD3, ICD4				Diagnosis Code(s)	220.822
Code				CPT Code(s)	87426
M1				Modifiers	QW

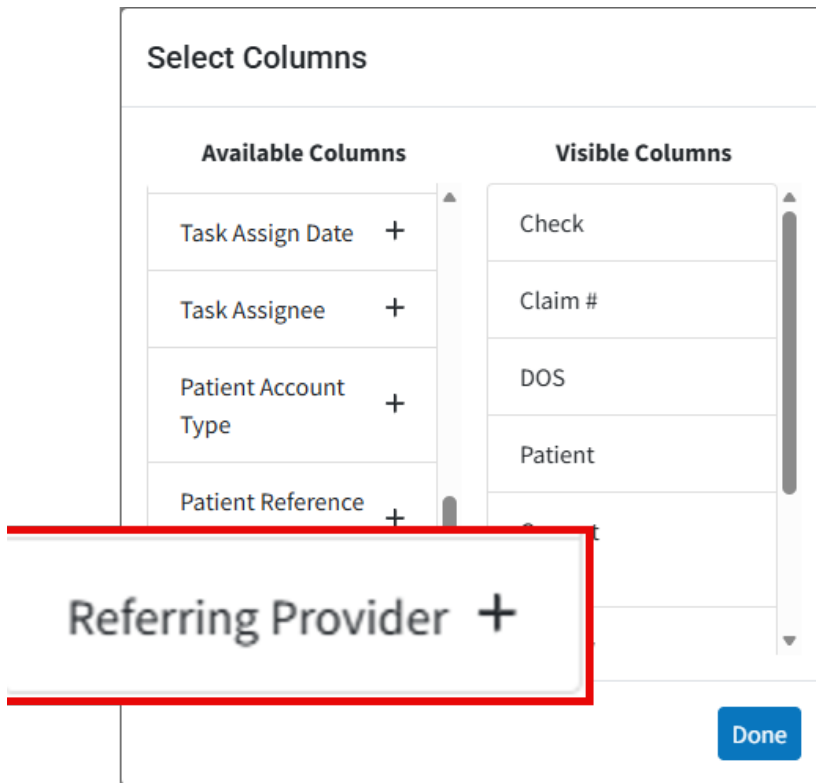
[Import](#) [Back](#) [Cancel](#)

Continue checking our release notes for further Universal Import updates and enhancements coming soon

Enhancements

New Referring Provider Column in Claim Control

When reviewing claims, users often need to verify referring provider information, particularly for services from payers where the referring provider is always required. Previously, when working claims from the Claim Control screen, users had to open each individual claim to ensure this information was present and accurate. To improve this workflow, we have added the referring provider as an optional column (hidden by default) in Claim Control. This column allows users to identify and quickly access claims missing a referring provider for correction.



GPI Onboarding Now Automatically Checks Status of In-Progress Applications

Previously, the status of in-progress GPI applications (and their credentials) was only checked when users manually accessed the In-App Payment Processing section. As this process was often overlooked, we have updated the system to automatically check for pending applications upon login. This ensures that credentials and merchant details are retrieved promptly, allowing users to begin processing payments without delay.

Resolutions

Ability to Run Patient Eligibility When a Patient Record is Locked

Previously, if a user opened a patient record already locked by another user, they could view the information but were unable to check eligibility. As saving the record is not required to perform this action, this update allows users to run eligibility checks even when a patient record is locked (in use) by another user.

Practice Fusion Issues Fixed

We resolved an issue with payment tracking for Practice Fusion where, Practice Fusion payments were

Incorrectly consolidated onto a single receipt despite occurring at different times. We have updated the system to generate a separate receipt for each Practice Fusion payment, ensuring they can be printed individually in CMD.

We also implemented reliability improvements to resolve a duplication issue where Practice Fusion sent redundant claim copies.

Scrolling Issues in Safari

We have resolved scrolling issues in Safari where headers would disappear when viewing large tables. The headers now remain correctly positioned. Mac users who previously switched browsers due to this issue may now return to Safari, as functionality has been restored.

Intelligent Claim Rejection: "Marked as Fixed" Issue

We resolved an issue where marking claim rejections as "fixed" did not consistently update their status. Previously, claims remained visible in search results for unresolved issues due to underlying errors that were not properly cleared. This update ensures that all claim issues are fully marked as resolved upon confirmation.

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