CollaborateMD
Helping Healthcare Act As One

June 14, 2010

OVERVIEW

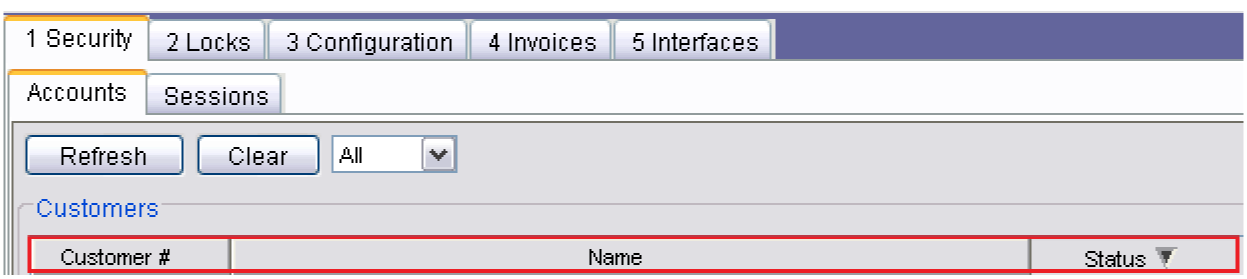
These release notes describe the issues that have been fixed, improved, and enhanced. We have also included new features to assist our customers in increasing efficiency and productivity. We recommend that all users upgrade to this latest version.

CollaborateMD is interested in your feedback.

Visit http://www.zoomerang.com/Survey/WEB22AWYJLQB4S to take part in a short and simple survey to help us obtain feedback and improve future versions of our Release Notes.

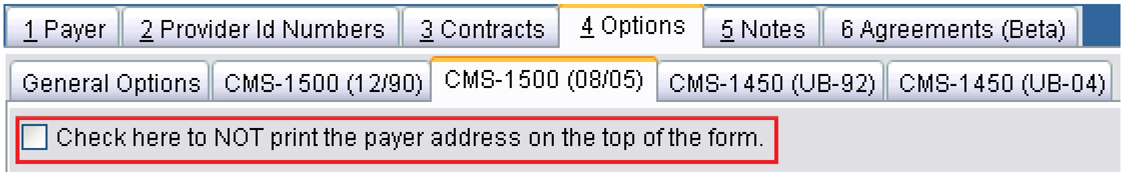
ADMINISTRATION SECTION

- The customer table under **Security** > **Accounts** tab can now be simply sorted by **Customer #, Name**, and **Status** with a click of a button. Click the column header to sort the rows.

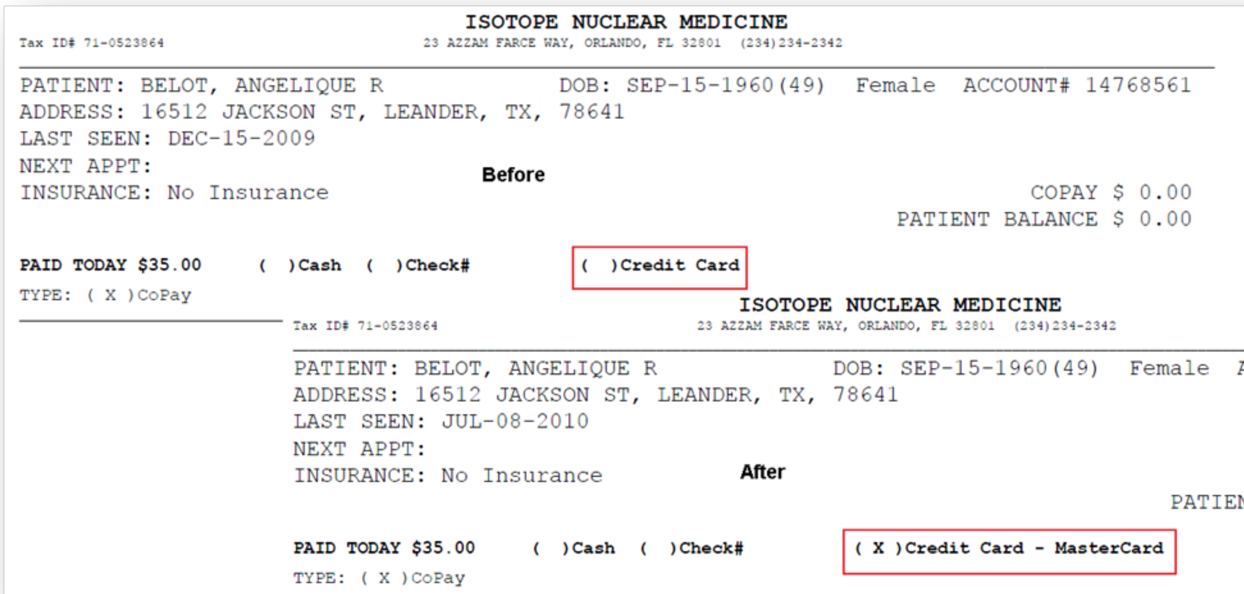


CLAIM SECTION

- Previously, the Payer Address was NOT printing on the top of the CMS Form when the option "**Check here to NOT print the payer address on the top of the form** " was checked in the following section: **Payer** > **Options** > **CMS -1500 (12/90)** and **CMS-1500 (08/05)** tab. This issue has been fixed.



- In the **Charges** tab, the "**Print Receipt on Claim Creation**" option has been modified to display that a Credit Card was used. The type of Credit Card will now be listed beside it.



- When you locate a facility in the **Facilities** section, the CMS – 1500 form will automatically default to print the CLIA# in box 23 for Medicare payers.

PAYMENT SECTION

- Fixed a small issue regarding Auto Apply reports. If an Auto Apply report is opened, and the user does a search in which results are found, and then opens a different Auto Apply report, the Search Bar buttons are now enabled.

- Fixed an intermittent issue in EOB Posting where the **Adjustment** memo-line was not reflecting the correct payer name.

- Fixed an issue where the **Applied** checkbox in the **Remittance Check** tab of the Auto Apply section was not setting after applying a check. When you decide to apply a check, the system will apply and automatically update the checkbox for visual confirmation.

  The data was set correctly in the database and would only appear checked after the "**Click to Load Checks**" was reselected.

- Account credits created from the **Patient Payment Redistribution** feature of ERA Auto Apply needed a holder to balance off of. In the previous version, the Account Credits could not be found under the **Credit Management** tab in order to refund back to the patient even though they existed in the patient record.

- Corrected a defect in ERA Auto Apply where the Remittance checks table could not be sorted by the **Applied** column.

- Secondary ERA Auto Apply payments were not posting in some instances due to a comparison operator defect between the total paid on the claim and the total paid of the charges. This issue has since been corrected and deployed to 8.3.3 and 8.4.0 servers.

- The **"Auto-Apply Report"** will now display immediately after applying an ERA.

- Fixed a defect when deleting an EOB check from **EOB Posting**. The account credits and partial credit transfers were not being refunded back to the patients.

- Fixed an issue with the **Track** button (short-cut keys) in EOB Posting. **Alt + D** will delete the check and **Alt + T** will now open the claims in the **Tracking** section.

- Improved **ERA Auto-Apply**. We can now support Reversal's at the claim level.

PROVIDER SECTION

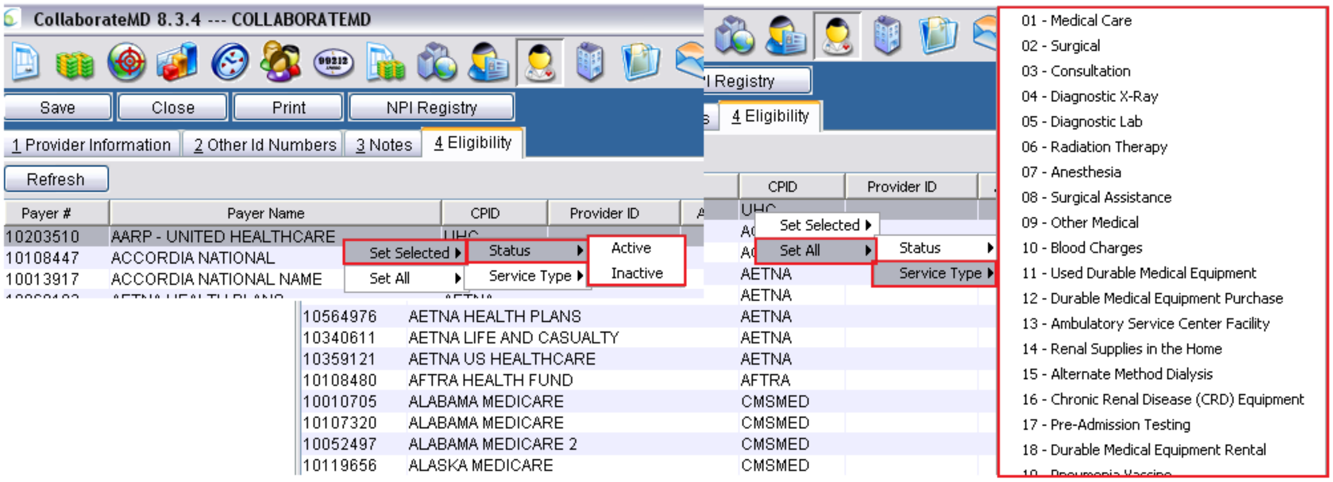
- The warning message indicating that a "Provider ID is Required" to be entered before a payer is set to Active has been removed. Provider ID numbers are no longer required to check eligibility.

- Removed the outdated/non-par column. All eligibility payers are non-par payers with RelayHealth.

- Added a right-click functionality that will now allow customers to activate all eligibility payers at once instead of on an individual basis. Clients may also set the **Default Service Type** for all payers. The Default Service Type will be the defaulted specialty that's selected every time eligibility is checked for a patient; however, this can be changed at any time.

This can be found in the **Provider** section > **Eligibility** tab> **Right click** anywhere on the screen. Two options will be displayed "**Set Selected**" and "**Set All**".

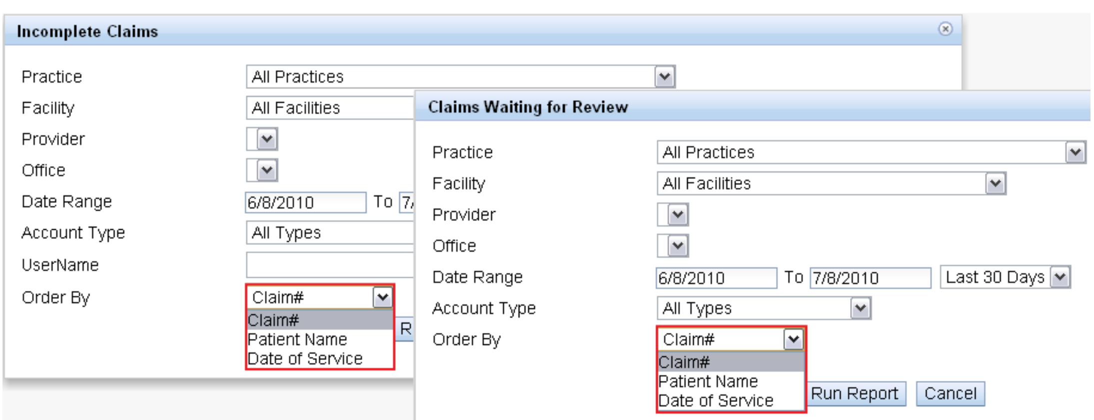
- ***"Set Selected***" will apply the changes to the payers that you have highlighted.
- ***"Set All"*** will apply the changes you have selected to all of the payers listed.



- "N/A "will now be displayed under the Approved tab if no agreements are required for the payer. In previous versions, this column would display "No" if an agreement was not required for the payer.

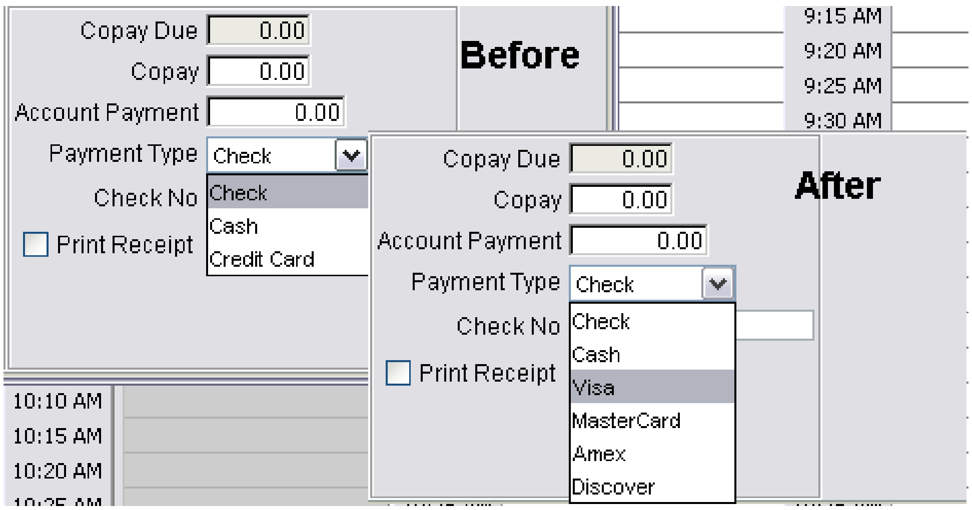
REPORTS SECTION

- The **Waiting for Review** and **Incomplete Claim** reports on the User Portal can now be filtered by Date of Service, Claim#, and Patient Name.



SCHEDULER SECTION

- In the **Appointment** popup window of the Scheduler, the tab's **Patient tab > Payment Type** combo box has been modified to contain the same list of Credit Card types (Visa, Amex, Discover, MasterCard) as found in the **Claim** section.



- When an **Appointment Type** is added or deleted in the Scheduler's Type tab, the change will now be available in the **Scheduler** tab. The cache for the department appointment types was not getting refreshed with the change.

- Fixed an issue where the **Appointment Window** would fail to open when a time slot was double-clicked.

- Fixed an issue where there was a conflict in accessing the resource cache. If the user clicked the "**Retrieve**" button on the **Scheduler** tab after saving a change to a resource on the Resource tab, the user would occasionally receive a pop-up message stating "**No resources were found**".

- Modified the manner in which appointments in the **Day** and **Week** view panels were updated. The panel no longer removes all the existing appointments and restores the corrected panel contents, but only removes and restores any appointments that have changed. Changes include new appointments, modified date, start time, duration, color (due to status change), or changes in appointment icon. This should help minimize the "blinking" of appointment blocks on the day and week view panels.

- Fixed an issue when printing a **Superbill** from the Scheduler. The appointment date/time was not being passed correctly to the Superbill. If the "**Always Use Date Generated in Date Field**" box is checked for the CMD Default Superbill, we will always use the "Date Generated (Today's

Date)" as the date to print on the Superbill. If this box isn't checked, we will automatically generate the date of the patient appointment. This option can be found in the following section, **Admin** > **Configuration** > **Superbills**.