

COLLABORATEMD
VERSION 8.3
RELEASE NOTES



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CollaborateMD Version 8.3 Release Notes

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1 RELEASE NOTES SUMMARY

The following tables provide descriptions of the changes that have occurred in the system for version 8.3.

1.1 VERSION 8.3 SECTION CHANGES

The following table provides a summary of the changes that have occurred within affected sections in version 8.3.

Section/Area	Summary Description	In Section/Tab
Tool Menu	<ul style="list-style-type: none"> Additional icons added to access the User Portal and Enhanced Reports 	<ul style="list-style-type: none"> Toolbar
Admin	<ul style="list-style-type: none"> Tabs have been changed to provide better organization and access to functionality Additional tabs have been added to configure reviewing options (address checking, insurance eligibility checking, and code scrubbing), label options, superbill options, appointment confirmation options (phone notification services), and jobs administration options. 	<ul style="list-style-type: none"> Admin

RELEASE NOTES SUMMARY

Section/Area	Summary Description	In Section/Tab
Claim	<ul style="list-style-type: none"> • New feature – “Sales Rep” button on the Claim tab (for DME Companies) • New feature – “Initial Delivery Date” field on the Other Info dialog window (displayed by selecting Other Info button on line item (for DME Companies) • Important/Note: These fields are only available if “Show DME fields” – Yes option is selected on System – Defaults tab 	<ul style="list-style-type: none"> • Claim → Claim tab • Claim → Charges tab → Other button (line item)
	<ul style="list-style-type: none"> • New feature – Claim validation (Code Scrubbing) is accessed through the Review tab 	<ul style="list-style-type: none"> • Claim → Review tab
	<ul style="list-style-type: none"> • Ability to print Superbills 	<ul style="list-style-type: none"> • Claim → Print button
Patient	<ul style="list-style-type: none"> • New feature – “Sales Rep” tab has been added to the bottom of the Patient – Patient tab. This option is only available if “Show DME fields” – Yes option is selected on System – Defaults tab 	<ul style="list-style-type: none"> • Patient → Patient tab → Sales Rep tab
	<ul style="list-style-type: none"> • New feature – “Custom Fields” tab on the Patient tab. These fields can be used in conjunction with the custom fields feature found when using Enhanced Reporting in the User Portal. 	<ul style="list-style-type: none"> • Patient → Patient tab → Custom Fields tab
	<ul style="list-style-type: none"> • Ability to print labels and Superbills 	<ul style="list-style-type: none"> • Patient → Print button

RELEASE NOTES SUMMARY

Section/Area	Summary Description	In Section/Tab
	<ul style="list-style-type: none"> Address Verification Services for patient demographics 	<ul style="list-style-type: none"> Patient
Payer	<ul style="list-style-type: none"> Ability to print labels and Superbills 	<ul style="list-style-type: none"> Payer → Print button
	<ul style="list-style-type: none"> Address Verification Services for payer demographics 	<ul style="list-style-type: none"> Payer
Practice	<ul style="list-style-type: none"> Ability to print labels and Superbills 	<ul style="list-style-type: none"> Practice → Print button
	<ul style="list-style-type: none"> Address Verification Services for payer demographics 	<ul style="list-style-type: none"> Practice
	<ul style="list-style-type: none"> Provides the ability to record the prompt for message sent to patients confirming their appointment (Phone Notification Services) 	<ul style="list-style-type: none"> Practice → Main Information
Provider	<ul style="list-style-type: none"> Ability to print labels and Superbills 	<ul style="list-style-type: none"> Provider → Print button

RELEASE NOTES SUMMARY

Section/Area	Summary Description	In Section/Tab
	<ul style="list-style-type: none"> Provides the ability to record the prompt for message sent to patients confirming their appointment (Phone Notification Services) 	<ul style="list-style-type: none"> Provider → Main Information
Referring	<ul style="list-style-type: none"> Ability to print labels and Superbills 	<ul style="list-style-type: none"> Referring → Print button
Scheduler	<ul style="list-style-type: none"> Schedule button has been added to the Scheduler tab Selecting the Schedule button opens the Schedule Appointment dialog window. This was formerly the Find Open Appointment dialog 	<ul style="list-style-type: none"> Scheduler → Scheduler tab
	<ul style="list-style-type: none"> The pop-up menu that is displayed when you right-click on the Scheduler grid has been modified Schedule and New Appointment options have been added to the right-click menu. Schedule is a new feature. New Appointment was previously a sub-option under Add Appointment Find Open Times has been removed from the pop-up menu. This has been replaced by Schedule Add Appointment has been changed to Add Appt For... 	<ul style="list-style-type: none"> Scheduler → Scheduler tab

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Section/Area	Summary Description	In Section/Tab
	<ul style="list-style-type: none"> Resources tab now allows users to create Hour Groups where start and end times can be specified for schedule exceptions such as vacations, leave of absences, etc. 	<ul style="list-style-type: none"> Scheduler → Resource tab
	<ul style="list-style-type: none"> Department field has been added to the dialog window that is displayed to print the daily schedule, weekly schedule, and Superbill 	<ul style="list-style-type: none"> Scheduler → Print button
	<ul style="list-style-type: none"> Ability to print labels and Superbills 	<ul style="list-style-type: none"> Scheduler → Print button
	<ul style="list-style-type: none"> Address Verification Services for patient demographics 	<ul style="list-style-type: none"> Scheduler → New Appointment dialog
	<ul style="list-style-type: none"> Department support provides the ability to create and use departments within a practice to better manage resources 	<ul style="list-style-type: none"> Scheduler → Department tab
	<ul style="list-style-type: none"> Provides the ability to record the prompt for message sent to patients confirming their appointment (for Phone Notification Services) 	<ul style="list-style-type: none"> Scheduler → Resources
	<ul style="list-style-type: none"> Provides the ability to specify home phone, work phone, cell phone, or email address as the method to deliver the confirmation message for the patient's appointment (for Phone Notification Services) 	<ul style="list-style-type: none"> Scheduler → New Appointment dialog and Appointment Editor

RELEASE NOTES SUMMARY

Section/Area	Summary Description	In Section/Tab
System	<ul style="list-style-type: none"> • “Show DME Fields” option has been added to the Defaults tab. Enabling this option displays DME options in the Claim and Patient sections • “Show ICD Codes on Activity” option has been added to the Defaults tab. Enabling this option displays ICD Codes when an Activity report is run in the Claim and Patients sections 	<ul style="list-style-type: none"> • System → Defaults tab
Tracking	<ul style="list-style-type: none"> • Department field has been added to the dialog window that is displayed to perform batch printing 	<ul style="list-style-type: none"> • Tracking → Batch Printing
	<ul style="list-style-type: none"> • Claim Import provides the ability to create and submit a claim using the import feature to import data from a XML-based file. 	<ul style="list-style-type: none"> • Tracking → Claim Control → Import button

1.2 VERSION 8.3 FEATURE ADDITIONS/CHANGES

The following table describes specific features and functionality that appear in this version.

Version Feature	Summary Description	In Section/Tab
Address Verification Services	<ul style="list-style-type: none"> • Configuration tab in Admin section to configure functionality for feature 	<ul style="list-style-type: none"> • Admin
	<ul style="list-style-type: none"> • Address Verification for patient demographics 	<ul style="list-style-type: none"> • Patient • Scheduler → New Appointment dialog
	<ul style="list-style-type: none"> • Address Verification for payer demographics 	<ul style="list-style-type: none"> • Payer
	<ul style="list-style-type: none"> • Zip Code Verification 	<ul style="list-style-type: none"> • Wherever Zip Code field appears
Claim Import	<ul style="list-style-type: none"> • Provides the ability to create and submit a claim by importing data using an XML-based file. 	<ul style="list-style-type: none"> • Tacking → Claim Control → Import button
CollaborateMD User Portal (Refer to the <i>User Portal Overview</i> for detailed information)	<ul style="list-style-type: none"> • Provides access to additional resources <ul style="list-style-type: none"> ○ CollaborateMD Social Media Sites ○ Code Viewer ○ Enhanced Reports ○ NPI Registry 	<ul style="list-style-type: none"> • User Portal
Custom Fields	<ul style="list-style-type: none"> • Provides the ability to use the Custom Fields tab to specify additional fields that are available for use in Enhanced Reporting found in the User Portal 	<ul style="list-style-type: none"> • Patient → Patient tab → Custom Fields tab

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Version Feature	Summary Description	In Section/Tab
Department Support	<ul style="list-style-type: none"> Provides the ability to create and use departments within a practice to better manage resources 	<ul style="list-style-type: none"> Scheduler → Department tab
Enhanced Coding Edits	<ul style="list-style-type: none"> Provides the ability to review and validate the codes used on claims before submitting to the clearinghouse 	<ul style="list-style-type: none"> Claims
Jobs Admin	<ul style="list-style-type: none"> Provides the ability to manage claim import jobs 	<ul style="list-style-type: none"> Admin → Configuration tab → Jobs tab
Label Printing	<ul style="list-style-type: none"> Configuration tab in Admin section to configure functionality for feature 	<ul style="list-style-type: none"> Admin
	<ul style="list-style-type: none"> Provides the ability to print labels 	<ul style="list-style-type: none"> Patient Payer Practice Provider Referring Scheduler
Phone Notification Services	<ul style="list-style-type: none"> Configuration tab in Admin section to configure functionality for feature 	<ul style="list-style-type: none"> Admin
	<ul style="list-style-type: none"> Provides the ability to record the prompt for message sent to patients confirming their appointment 	<ul style="list-style-type: none"> Practice → Main Information Provider → Provider Information Scheduler → Resources

RELEASE NOTES SUMMARY

Version Feature	Summary Description	In Section/Tab
	<ul style="list-style-type: none"> Provides the ability to specify home phone, work phone, cell phone, or email address as the method to deliver the confirmation message for the patient's appointment 	<ul style="list-style-type: none"> Scheduler → New Appointment dialog and Appointment Editor
Superbills	<ul style="list-style-type: none"> Configuration tab in Admin section to configure functionality for feature 	<ul style="list-style-type: none"> Admin
	<ul style="list-style-type: none"> Provides the ability to print labels 	<ul style="list-style-type: none"> Claim Patient Scheduler
Enhanced Reports (Refer to the <i>Reports Guide</i> for detailed information)	<ul style="list-style-type: none"> Provides access to enhanced functionality for reports 	<ul style="list-style-type: none"> User Portal → Enhanced Reports