

# Release 24.118 - September 19th, 2024

Last Modified on 09/19/2024 7:57 am EDT

## Executive Summary

### Text to Pay

New Text to Pay Feature

[Release Note](#) | [Feature Documentation](#) | [Setup Documentation](#)

Send Text to Pay Request From the Quick Pay Screen [Release Note](#)

[Release Note](#) | [Documentation](#)

Send Text to Pay Request From the Patient Setup Screen

[Release Note](#) | [Documentation](#)

Send Text to Pay Request From the Claim Entry Screen

[Release Note](#) | [Documentation](#)

Text to Pay - Payment Receipts/Communication

Preferences

[Release Note](#)

### Reports

New Monthly Financial Report

[Release Note](#) | [Documentation](#)

New iReport Fields

[Release Note](#)

New DSI Feedback Report

[Release Note](#)

## New Features and Updates

### Introducing Our New Text to Pay Feature

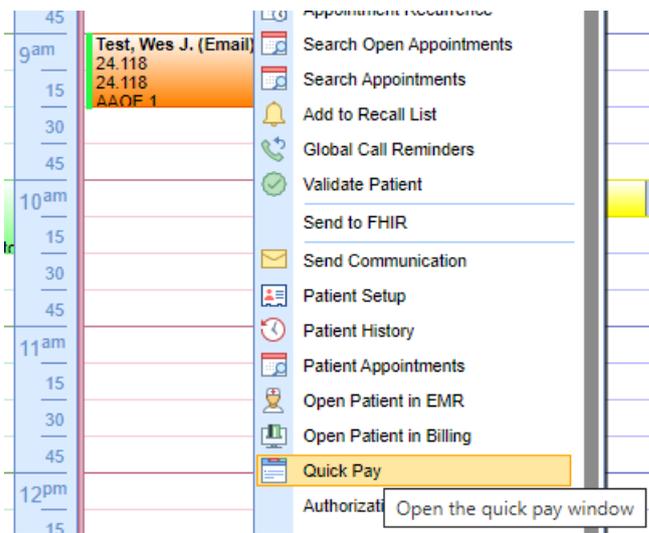
We are pleased to introduce a new way to collect patient payments, making patient check-ins and check-outs at your practice even easier! Our "Text to Pay" feature is intended to aid practices in patient payment collection, by allowing users to send a payment request text link to the patient. This can be done for the collection of a co-pay or patient outstanding balance.

Please note that the Text to Pay feature works in conjunction with our PaySimple integration, this means that a PaySimple merchant setup is required to use the Text to Pay feature.

Getting started is easy. Simply enable the required company settings to allow the utilization of the Text to Pay feature. Additionally, you will be required to set up the Text to Pay Practice information. For more information on these settings, visit our [Text to Pay Setup](#) document.

**There are 3 different ways that the Text to Pay request can be sent to the patient:**

1. **From the Quick Pay Screen:** Right-click on the patient appointment and select Quick Pay to open the Quick Pay screen from a scheduled appointment (you can also open the Quick Pay screen by checking in or checking out an appointment).



Once you enter the payment information (amount, and type) and set the payment method to Credit Card you will see the **Text to Pay** button. Once you verify the phone number and click Send, you will receive a confirmation that the Text to Pay link was successfully sent.

For more information about sending a Text to Pay request from the Quick Pay Screen click [here](#).

2. **From the Patient Setup Screen:** You can send a Text to Pay request within the Patient Setup screen by clicking More on the toolbar and selecting **Text to Pay**.

Once you verify the phone number and click Send, you will receive a confirmation that the Text to Pay link was successfully sent. For more information about sending a Text to Pay request from the Patient Setup Screen click [here](#).

3. **From the Claim Entry Screen:** You can send a Text to Pay request within the Claim Entry screen by clicking the Payments drop-down on the toolbar and selecting Text to Pay.

The screenshot displays the 'Claim entry for Claim' interface in Microsoft Edge. The browser address bar shows the URL: <https://qatest.isalushealthcare.com/officemd/screens/claimentry.htm?claimid=44581&timestmp=1726508298191&u1=Imichell&u2=D4833908C379...>

The interface includes a search bar for the patient, identified as '29-Dec-1970 (53y)'. A dropdown menu is open under 'Payments', with 'Text to Pay' selected. Other options include 'Edit Payment', 'Edit Receipt', 'Credit Balance', 'Receipt Analysis', and 'Invalid Payments'.

The 'Status' section shows:
 

- Claim: 44581
- Status: In process - step 1, Statement
- Substatus: [Empty]
- Level: Statement
- Type: Medical
- Owner: [Searchable]
- Assign To: Assigned To
- 837: Professional (selected), Institutional

The 'Service' section includes:
 

- Location: Ip - North Mississippi Medical Center
- Rendering: [Searchable]
- Referring: [Searchable]
- Referred: [Dropdown]
- Other Providers: Alternate, Supervising, Ordering, Attending, Purchasing (all searchable)

The 'Procedures and Diagnoses' table is as follows:

#	Service Date		Procedure	POS	Procedure Amount			Modifiers				Diagnosis			
	From	To			Units	Charge	Amount	1	2	3	4	1	2	3	4
1	08/22/2019	08/22/2019	99221	21	1.00	\$150.00	\$150.00					R310	I10		
2	08/22/2019	08/22/2019				\$0.00						R310	I10		

Summary: Total: \$150.00 Pay/Adj: (\$64.54) Balance: \$16.19 Receipts: \$0.00

The 'Additional Information' section includes:
 

- Admission: 08/14/2019
- Discharge: [Searchable]
- Initial: [Searchable]
- Onset: [Searchable]
- Current Claim Edits: Dates, Miscellaneous

The 'Messages and Monitoring' section shows:
 

- Aging: [Info icon]
- Billing Message: [Green checkmark]
- Claim Validation: [Green checkmark]
- Patient Validation: [Green checkmark]
- Patient Only: N/A
- Code Limitations: N/A
- Required Fields: N/A
- Global Period: N/A
- 837 Validation: [Green checkmark]
- Monitoring: N/A

The 'Queue and Tasking' section states: 'The Queue and Tasking process is currently disabled. [Click here to run this process.](#)'

Once you verify the phone number and click Send, you will receive a confirmation that the Text to Pay link was successfully sent. For more information about sending a Text to Pay request from the Claim Entry Screen click [here](#).

### Text to Pay - Payment Receipts and Communication Preferences:

1. New Text Receipt Option: Added a new **E-Receipt** option to the Credit Card Receipts window and the Receipts window. When the option is selected an E-Receipt will be sent via SMS. A Receipt Submission Confirmation screen will allow you to confirm or override the submission preference (this is defaulted based on the patient's Payment Receipt Preference within the Patient Setup).

**Appointment Details**

Appt. ID: 144440 | Date & Time: 06/27/2024 1:00PM | Resource Name: [Redacted] | Primary Care Physician: None Reported | Service Location: AAOE 1 | Payment Batch: [Redacted]

Buttons: History | Payments | Validate | Intake Assign | Payment Plan: [Redacted]

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**Insurance Information**

Coverage	Active	Payer	Insured ID	Group/Policy Number	Copay
1	Y	United Healthcare	930405946	915784	\$0.00
2	Y	Aetna Test	1234567		\$0.00
3	Y	Aarp Medicare Complete Hmo			\$
4	Y	Uhc - Medicare Complete			\$
5	Y	Medicaid - Kentucky			\$
6	Y	Medicare Part B - Primary (FL)			\$

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**Enter New Receipt Detail**

No claim is attached to this appointment, current Charge Rate is 100%  
 Appointment Estimated Balance: \$0.00 No claim, unable to calculate

Amount: \$0.00 | Paid By: [Redacted] | Type: Co-Pay | Method: [Redacted]

Options:  Include Comment on Receipt |  Include Diagnosis on Receipt  
 Receipt Associated with Claim |  Include Procedures on Receipt

Buttons: Create Receipt

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**Receipt Transactions**

Amount Paid	Post Date	Paid By	Type	Method	ID #	Comment	User ID
[Empty Table]							

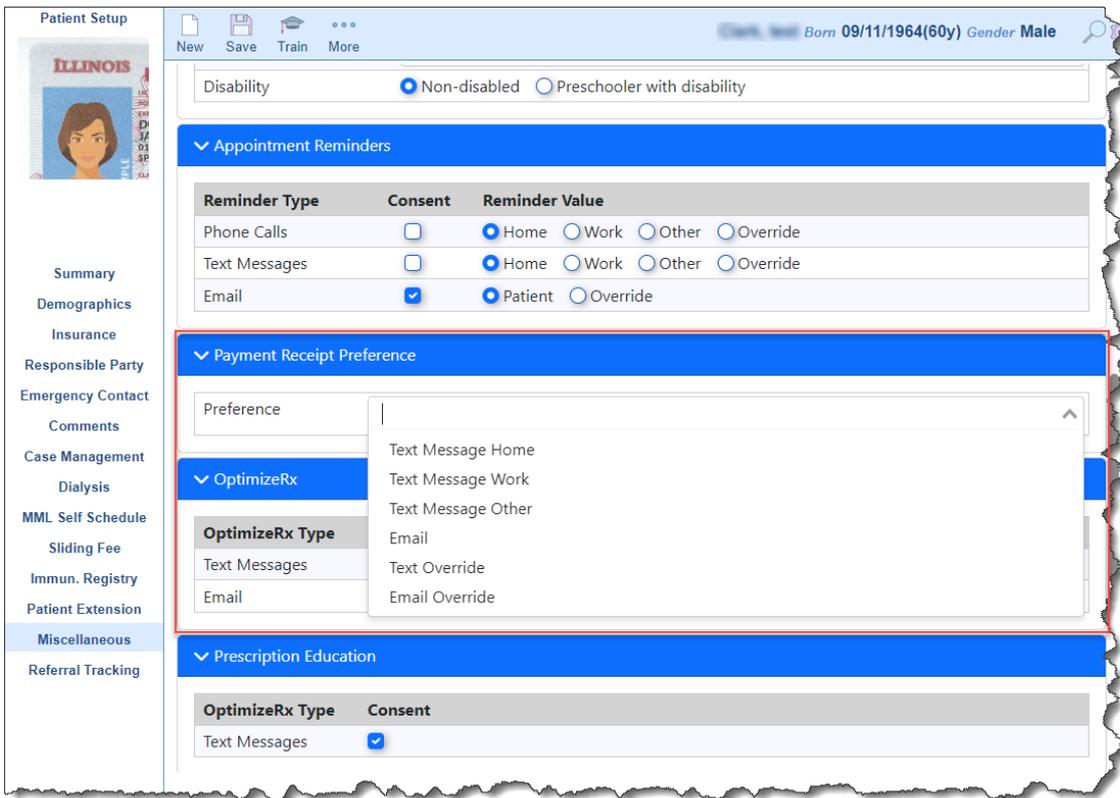
Buttons: Reverse Receipt | Print Receipt | E-Receipt | Quick Statement

Total Paid: [Redacted]

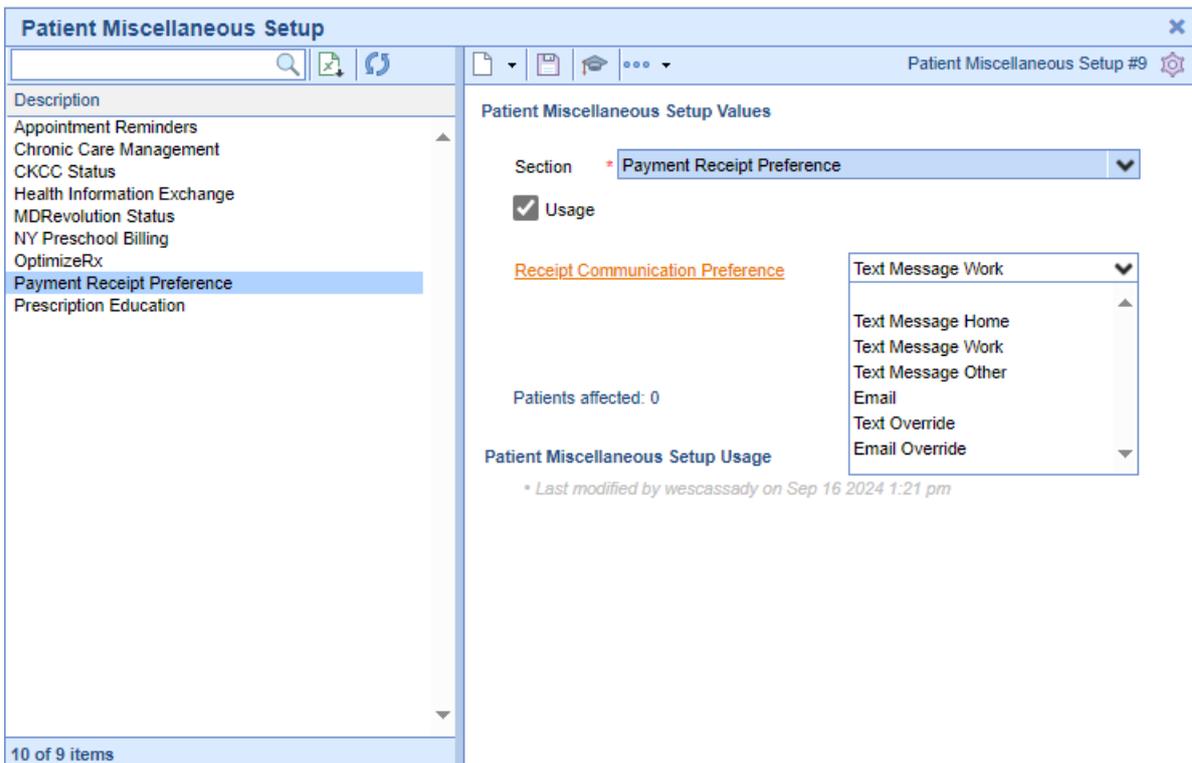
2. New Payment Receipt Preference Added to Patient Setup: Added a new payment receipt communication preference option within the Patient Setup window under the Miscellaneous tab. When selected, the **Payment Receipt Preference** option will designate how the receipt will be provided to the patient and will include several options for text messages or email.

**Payment Receipt Preference Options:**

- **Text Message Home:** The Receipt will be sent via text to the "Home" Phone Number set within the patient demographics fields.
- **Text Message Work:** The Receipt will be sent via text to the "Work" Phone Number set within the patient demographics fields.
- **Text Message Other:** The Receipt will be sent via text to the "Other" Phone Number set within the patient demographics fields.
- **Email:** The Receipt will be sent via email to the "Email" set within the patient demographics fields.
- **Text Override:** The Receipt will be sent via text to an alternate phone number (must be entered when selecting this option).
- **Email Override:** The Receipt will be sent via email to an alternate email (must be entered when selecting this option).



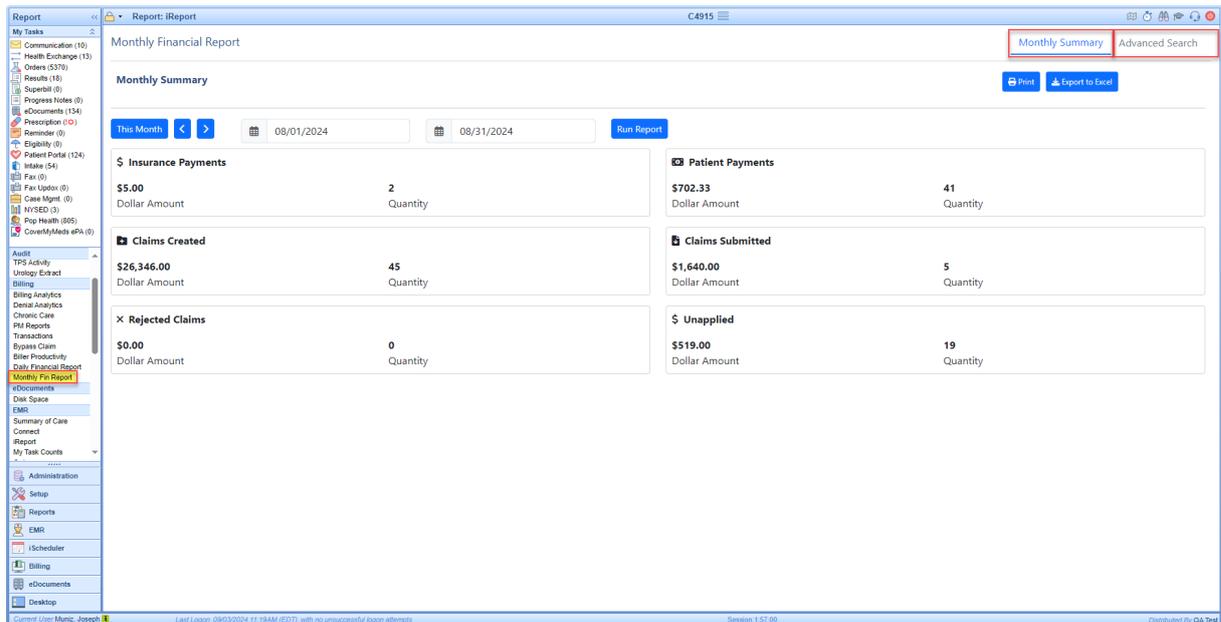
3. New Payment Receipt Default Preference Added to Miscellaneous Setup (All Patients): We added the **Payment Receipt Preference** option within the patient setup to control how a patient receipt will be sent to the patient (multiple options for text messages or email). Under this update, we also are including this default preference under **Setup > Patients > Gear icon** (upper right corner) so that the selections for the **Payment Receipt Preference** can be enabled and defaulted for the whole practice.



# Reports

## Billing

- U17875 - New Monthly Financial Report: Added a new Monthly Financial Report within **Reports > Billing > Monthly Fin Report**. The Monthly Financial Report can be used to provide financial data for close-of-month reporting. The report includes a summary tab with a summary of the monthly numbers that include; Claims Created, Claims Submitted, Insurance Payments, Patient Payments, Rejected Claims, and Unapplied Payments. It will also provide an advanced search option with the capability of claim drill-down allowing the billing team to quickly identify discrepancies, if applicable.

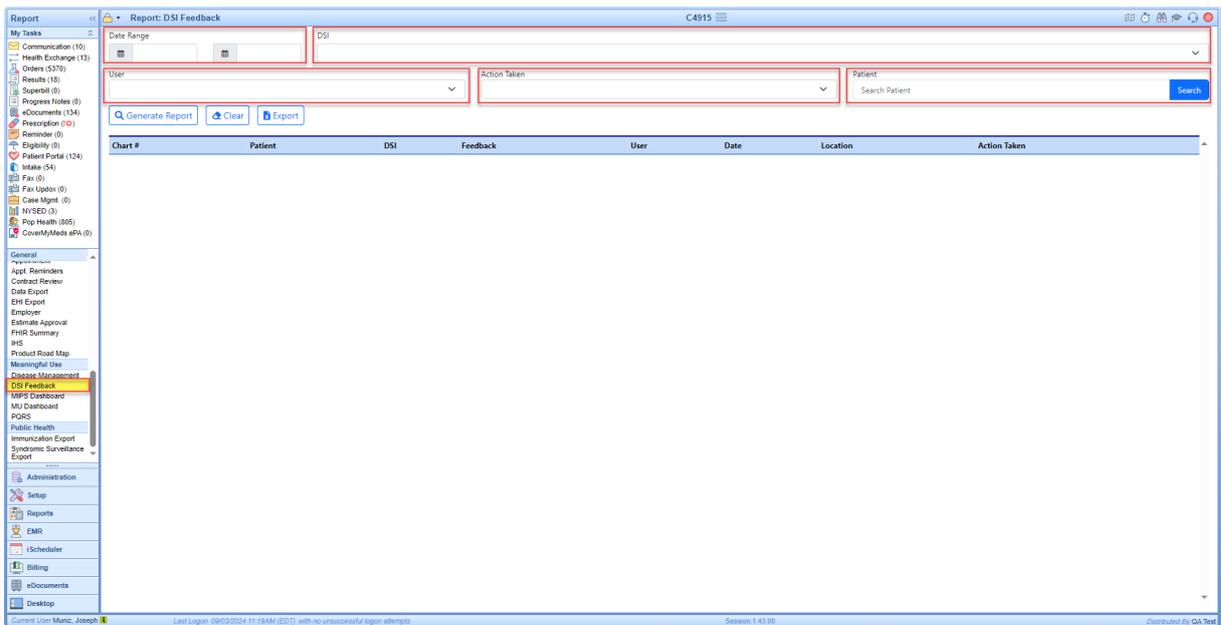


- More information on the new Monthly Financial Report may be found [here](#).

## EMR

- User Story 17848: Compliance Update to iReport to Support Required Fields: A new area for implantable device is now available:



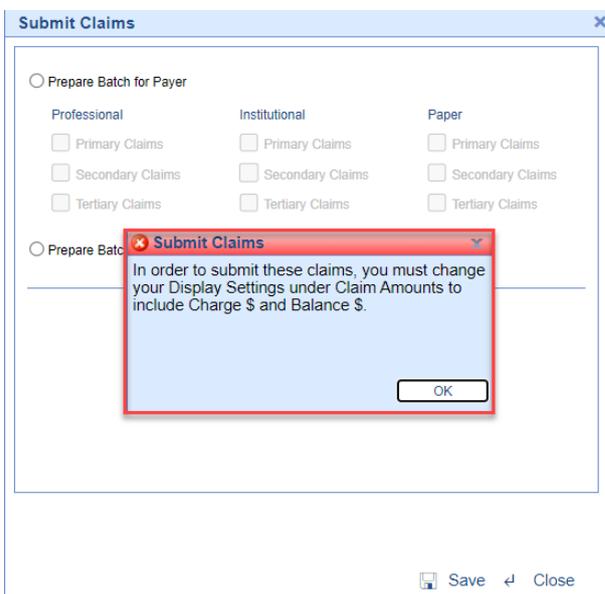


## Bug Fixes

### Billing

#### Claim Query

- B16992 - Claim Query - No Claims Found Error When the Claim Amounts Are Not In the Display Fields:**  
 Within the Claim Query window, if the Claim Amounts (Charges, Balances, etc.) were not part of the display field settings when batching claims that are ready for processing, an error message would occur stating "No Claims Found." We have improved the message displayed to inform the user that the Display Settings must be updated, ensuring the correct action is taken in this scenario.



- B13926 - Claim Query - Empty Filter Displaying No Claims: Corrected an issue within the Claim Query window where, when utilizing the "Empty" filter option, the search results were cleared rather than displaying only the claims with the Empty field. We updated the code within the database filter and the client-side filtering option to now check for both empty strings and null values.

## Statements

- B18259 - Statement Batches Averaging Longer Than Expected Times to Generate: Corrected an issue that could cause a statement batch job to take a long time to generate. We have fixed the code that was causing the creation of the temporary claim table to take an excessive amount of time.

## Receipts

- B18509 - Receipt Reversal Not Allowing Reversal Amount to be Updated: Corrected an issue stemming from release 24.117 that was preventing the Receipt Reversal option from allowing the reversal amount to be updated. We updated the refund amount field enablement logic so that when the Reverse Receipt button is clicked, the amount is no longer greyed out and can be edited.
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