

Release 25.127 - January 23rd, 2025

Last Modified on 01/23/2025 12:41 pm EST

Executive Summary

Company Settings

New Setting to Default The Cost Estimator Coverage Categories

[Release Note](#)

Rename/Expand Functionality of "HL7 Immunization 2.5.1 RXA 11 Blank" Setting

[Release Note](#)

Intake Assignment

New Appointment Types Setup Option To Update Future Appointments with New Intake Assignment

[Release Note](#)

Deposits

Ability To Reset A Single Claim Within A Deposit

[Release Note](#)

New Features and Updates

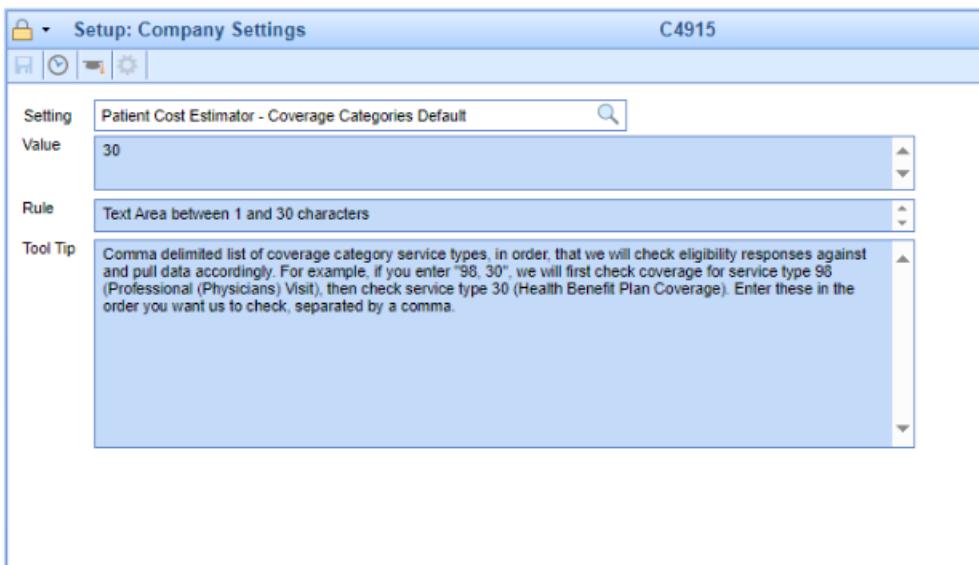
Setup

Company Settings

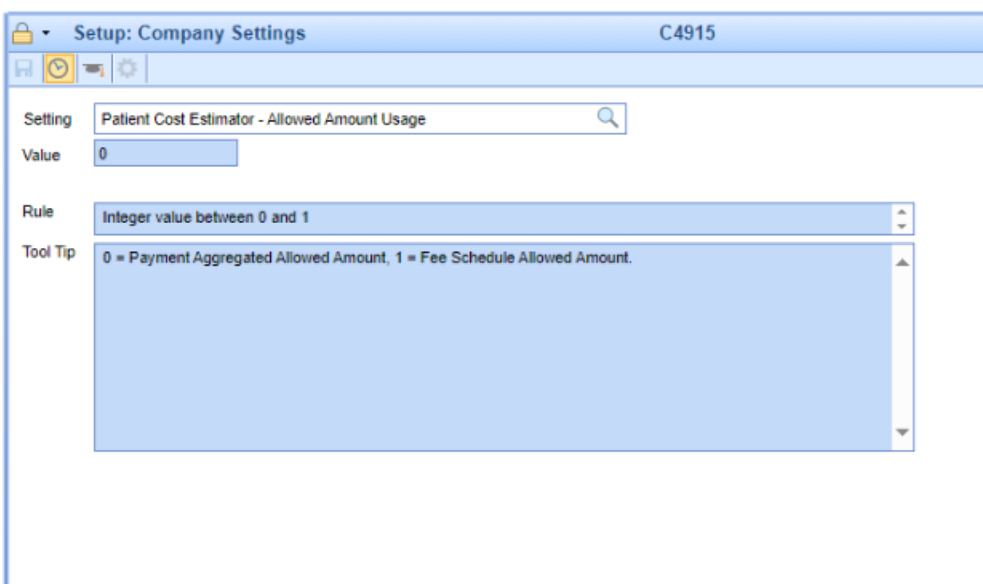
- U19052 - New Company Setting To Default The Cost Estimator Coverage Categories: We currently use the eligibility check to determine the out-of-pocket costs for patients with insurance when using the Patient Cost Estimator, defaulting the coverage category to Health Benefit Plan Coverage (30). However, for some of our practices and commercial payers, it makes more sense to utilize the Coverage Category of Professional (Physicians) Visit - Office (98), as this provides more details on the patient's copay, deductible, out-of-pocket expenses, etc., or a combination of multiple Coverage Categories to populate the full details of the patient's coverage.

To aid with this and prevent the user from having to manually enter details about the patient's coverage, a new company setting within **Setup > Administrative Setup > Company Settings** has been created to default the Coverage Category to be used for the Patient Cost Estimator. When set, Company Setting: "*Patient Cost Estimator - Coverage Categories Default*" will allow you to set a comma-delimited list of coverage category service types, and will use the order entered to check eligibility responses, and pull data accordingly.

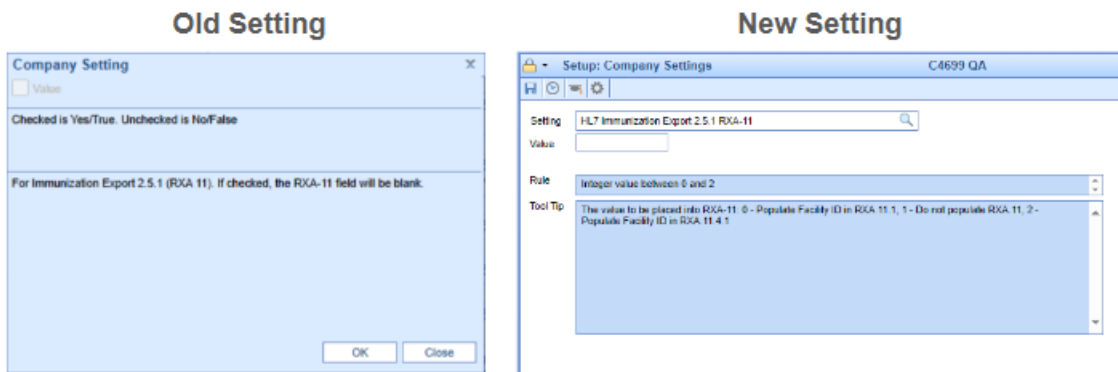
For example, if you enter "98, 30", we will first check coverage for service type 98 (Professional (Physicians) Visit), then check service type 30 (Health Benefit Plan Coverage). Enter these in the order you want us to check, separated by a comma.



- U19054 - Patient Cost Estimator - Updated The Allowed Amount Usage Setting Calculation: Updated the existing Company Setting: "*Patient Cost Estimator - Allowed Amount Usage*" so that when calculating the aggregate using the allowed amount, only amounts greater than 0 are used, and any reversals (negative amounts) are excluded.



- U19211 - Rename/Expand Functionality of "HL7 Immunization 2.5.1 RXA 11 Blank" Setting: We modified and renamed the existing Company Setting: "HL7 Immunization 2.5.1 RXA 11 Blank" to "HL7 Immunization Export 2.5.1 RXA-11" to support CHIRP and adhere to HL7 specifications. Previously, this setting had True/False options with two choices. We have now added a third option, numbered between 0-2. The purpose of this change is to format the RXA.11 segment as intended by the HL7 Specification (Populate Facility ID in RXA.11.4.1). The new options are:
 - Populate Facility ID in RXA.11.4.1 (New Option)
 - Populate Facility ID in RXA.11.1 (Previous False Option)
 - Do not populate RXA.11 (Previous True Option)



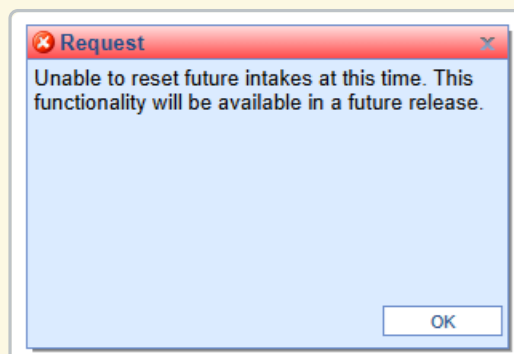
Patients

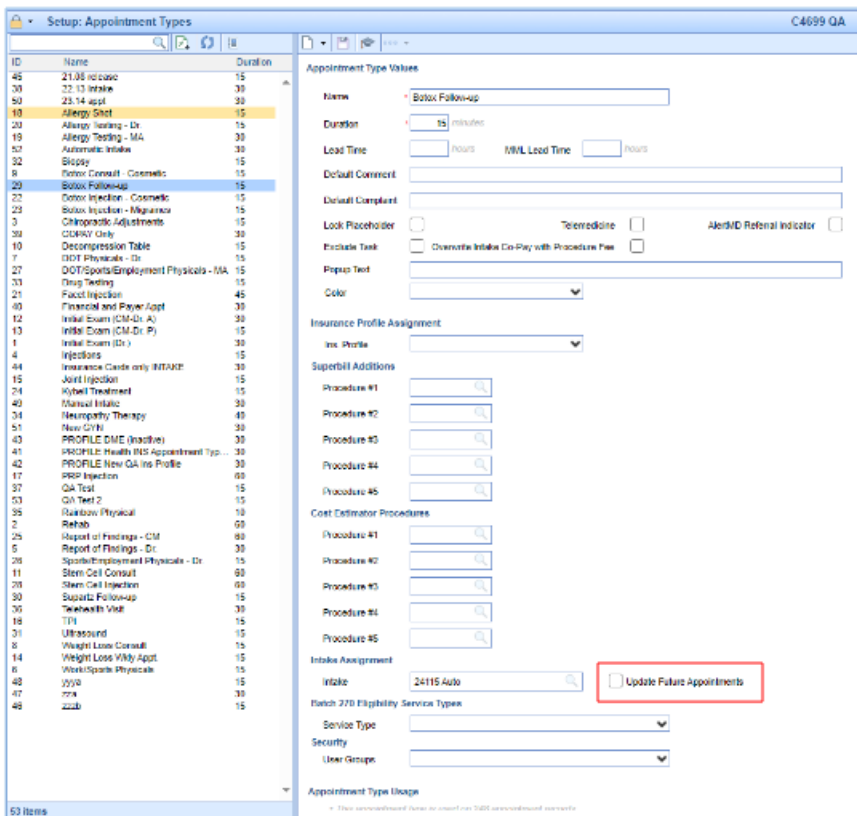
- U19053 - Patient Cost Estimator - Family Only Eligibility Response Logic Update: Updated the logic for populating patient benefits when an eligibility check returns a null or blank response for Individual deductible and/or out-of-pocket values (but provides family values), to populate the Individual values with the family values. Previously, the Individual values were left empty, affecting the cost estimator's expected out-of-pocket cost.

Appointment Types

- U10470 - New Appointment Types Setup Option To Update Future Appointments with New Intake Assignment: A new checkbox has been added within **Setup > Appointment Types > 'Intake Assignment'** section. This new option allows users to update all scheduled appointments of a specific appointment type to a newly selected intake type. When checked, the "*Update Future Appointments*" option will update all future appointments with the updated intake template, eliminating the need to do this manually for each appointment in iScheduler.

This checkbox will be displayed on the screen as of the release on 1/23/2025, but to ensure there are no unintended effects of this feature we will be taking the time to thoroughly test this before allowing the action to occur. This functionality is expected to become available upon the next release on 2/6/2025. Until this time the following message will be displayed:





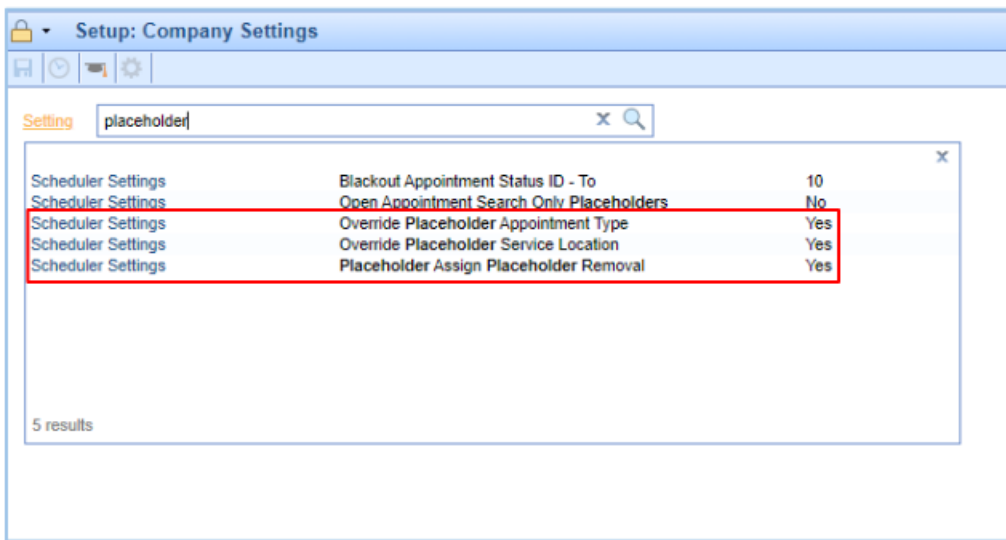
Intake Setup

- U13666 - New Message Directing Patients to Access Their NEW MML Login After Account Creation From Intake: Modified the process for creating an MML account from the Intelligent Intake to direct patients to the MML login page after account creation. Users will now receive the following message: "Please access the following link to log in to your MyMedicalLocker patient portal account using the username (phone or email) and password created in the intake form. {MML Login URL}" This message will be sent to the same contact (phone/email) used to receive the Intelligent Intake link.

iScheduler

Appointments

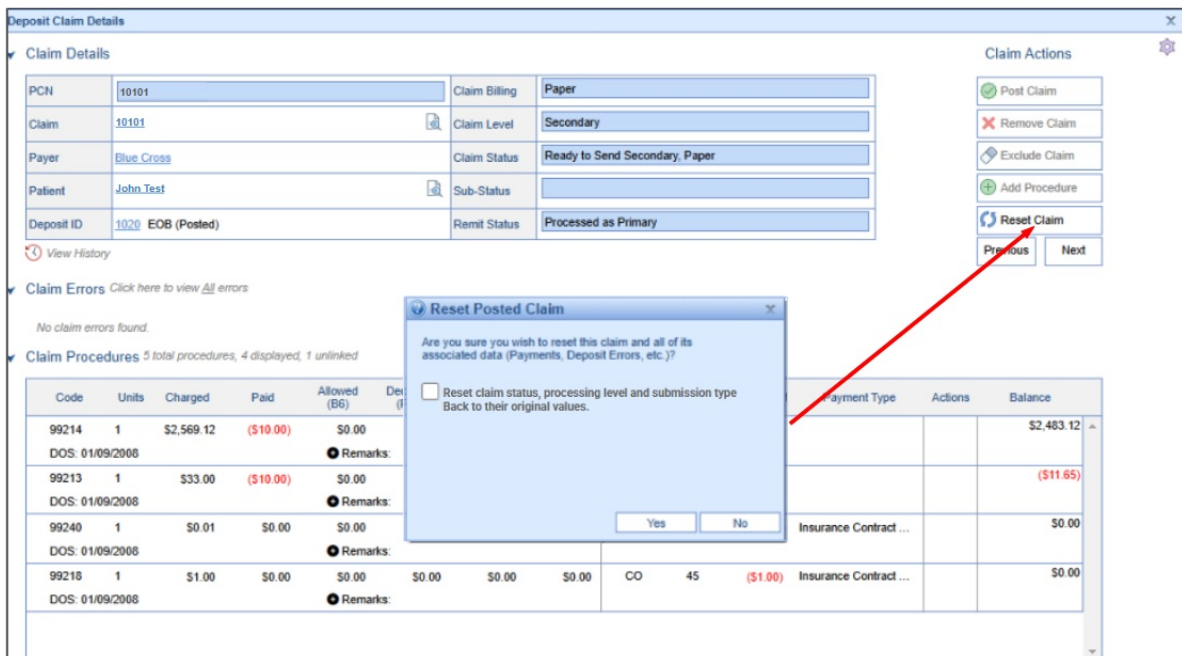
- U19124 - Dragging the duration of an appointment should hide corresponding placeholders: Updated the process for dragging an appointment past its expected duration (based on Appointment Type Setup) to ensure that placeholders are correctly consumed or released when increasing or decreasing the appointment size or moving the appointment. This enhancement ensures that, based on the enabling of any of the three company settings associated with overriding appointment placeholders (*Placeholder Assign Placeholder Removal*, *Override Placeholder Service Location*, and *Override Placeholder Appointment Type*), placeholders will be consumed or released correctly following all rules or combinations of rules based on the settings enabled.



Billing

Deposits

- U12299 - Ability To Reset A Single Claim Within A Deposit:** Previously, when a user needed to make changes to single/multiple claims within a large deposit that had been posted the whole deposit needed to be reset. This resulted in losing all the progress made on the other claims. To prevent this, we added a *Reset Claim* button within the Deposit Claim Details screen. This allows the user to remove the payments and adjustments, reset the claim status, processing level, and submission type that were posted on the claim without losing any progress from other claims in the deposit.



Prescribing

- U18584 - CMM - Enhance the Cancel ePA request process:** We have improved the prescription electronic Prior Authorization(ePA) cancel process to ensure all related (child) ePA records are properly updated when a user submits a cancellation request. Previously, child records were not aligned with the cancellation, causing some requests to remain stuck in a "cancelling" state. With this update, all associated records are updated accordingly, and the request is moved to the appropriate folder.

Additionally, we have introduced a new status: Externally Completed. This status allows users to indicate that an ePA request was completed outside of OfficeEMR. Users can optionally add a comment to provide details about the external completion or save without a comment to finalize the status update. The ePA record is then moved to the Completed folder, where users can view any associated comments if needed. Finally, any cancellation request notifications are now automatically sent to the associated payer, ensuring the process is fully completed.

For more details on these enhancements see [CoverMyMeds ePA](#).

The screenshots illustrate the workflow for updating an ePA request to 'Completed (Externally)'. The interface includes a main table of ePA requests, a 'Details' panel on the right, and a 'Comments' section for adding external completion notes.

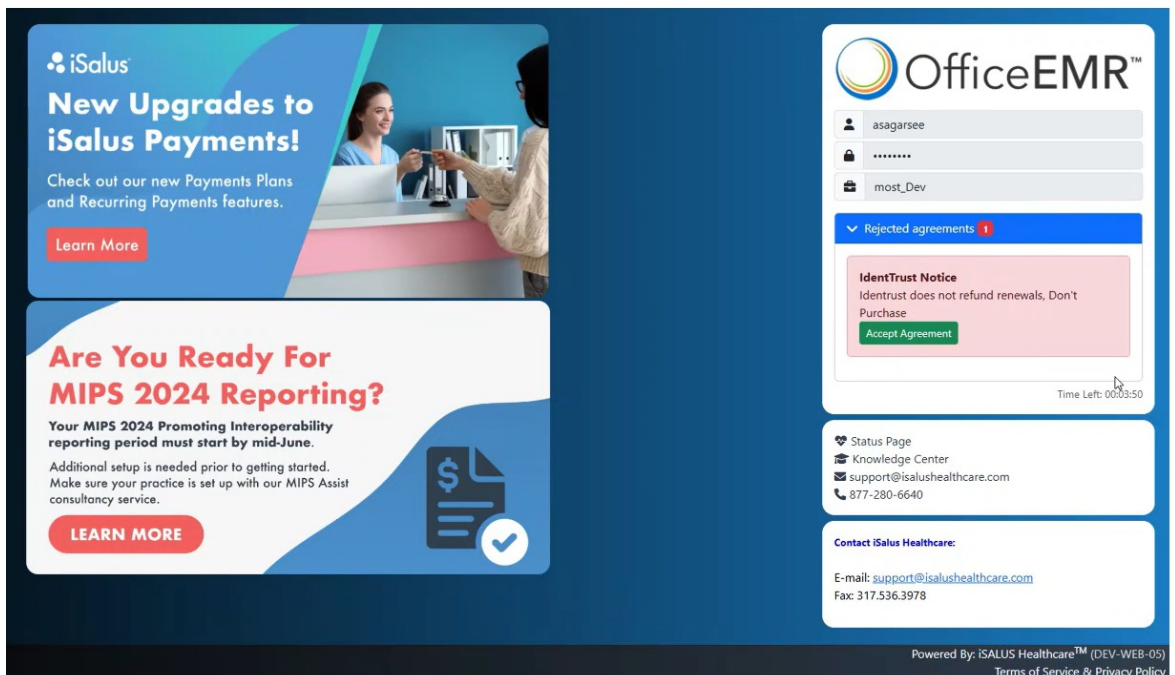
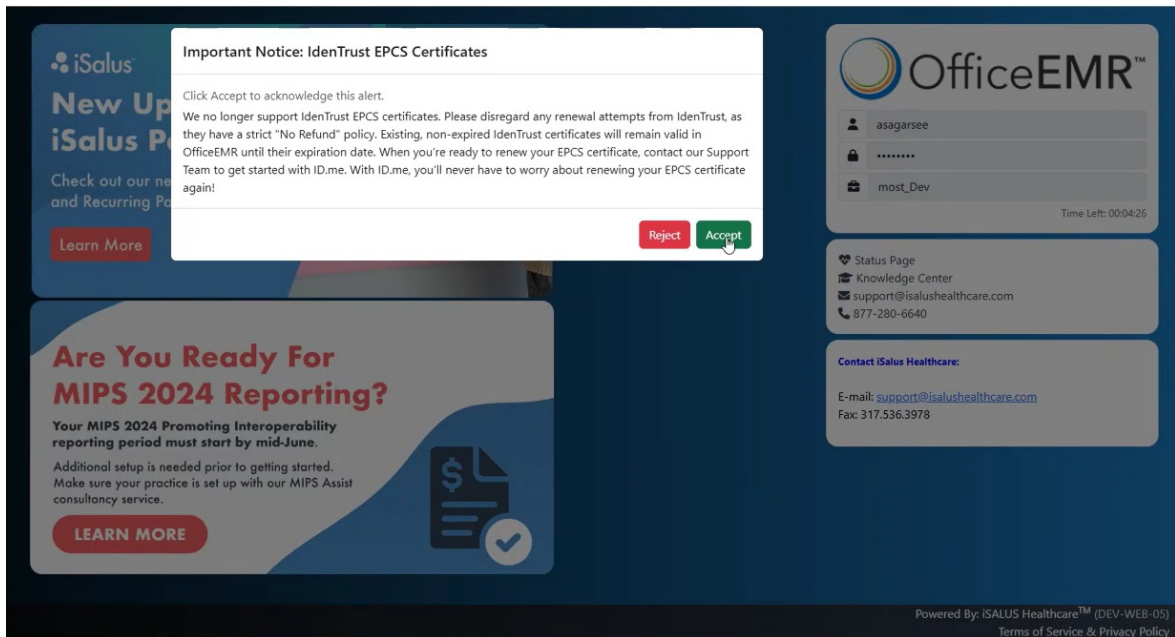
Patient Name	Status	Provider	Written Date	Drug Name	Deadline (UTC)	Post Date	By	Assignee
bob, test	Open	Smith MD, Maria N.	02/19/2024 20:20:04	Sildenafil 1 % topical cream	02/19/2025 22:13:53	02/19/2024 17:14:14	lobout	ePA Processor
bob, test	Denied (Pending)	Smith MD, Maria N.	02/19/2024 22:16:21	Sildenafil 1 % topical cream	02/19/2024 11:19:03	02/19/2024 11:19:03	lobout	ePA Processor
account, test F. Si (CKCC)	Open	Bertoli MD, Vincent C.	03/07/2024 16:26:39	Ambian CR 6.25 mg tablet extended release	03/07/2025 16:26:45	03/07/2024 11:25:06	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Open	Bertoli MD, Vincent C.	03/07/2024 16:26:43	BD Sust-Rel Springs 1 ml, 25 gauge x 1"	03/07/2025 16:26:48	03/07/2024 11:25:06	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Open	Bertoli MD, Vincent C.	03/07/2024 16:26:47	Epipen 2 Pak 0.3 mg/0.3 mg injection, auto injector	03/07/2025 16:26:51	03/07/2024 11:25:11	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Open	Bertoli MD, Vincent C.	03/07/2024 16:26:57	prochlorper 3 mg tablet	03/07/2025 16:27:02	03/07/2024 11:25:22	cbatou	ePA Word Doc
Addington, Winston B. 3rd	Open	Bertoli MD, Vincent C.	03/07/2024 16:39:14	Ambian CR 6.25 mg tablet extended release	03/07/2025 16:39:19	03/07/2024 11:39:41	cbatou	ePA Word Doc
Addington, Winston B. 3rd	Open	Bertoli MD, Vincent C.	03/07/2024 16:44:18	Ambian CR 6.25 mg tablet extended release	03/07/2025 16:44:23	03/07/2024 11:44:44	cbatou	ePA Word Doc
Addington, Winston B. 3rd	Open	Bertoli MD, Vincent C.	03/07/2024 16:47:42	Ambian CR 6.25 mg tablet extended release	03/07/2025 16:47:47	03/07/2024 11:48:08	cbatou	ePA Word Doc
Addington, Winston B. 3rd	Open	Bertoli MD, Vincent C.	03/07/2024 16:56:58	Ambian 10 mg tablet	03/07/2025 16:57:04	03/07/2024 11:57:26	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Open	Bertoli MD, Vincent C.	03/07/2024 16:59:36	hydrocodone bitartrate ER 30 mg capsule, oral only, extended rel 12 hr	03/07/2025 16:59:41	03/07/2024 11:59:46	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Denied (Pending)	Smith MD, Maria N.	01/22/2024 20:11:43	Sildenafil 1 % topical cream	01/22/2024 14:56:35	01/22/2024 14:56:37	lobout	ePA Processor
account, test F. Si (CKCC)	Followup	Smith MD, Maria N.	01/22/2024 20:11:43	Sildenafil 1 % topical cream	04/04/2025 14:56:35	04/04/2024 10:56:37	lobout	ePA Processor
account, test F. Si (CKCC)	Closed (Pending)	Bertoli MD, Vincent C.	04/05/2024 15:23:45	fluoxetine 20 mg/5 ml (4 mg/ml) oral solution	04/05/2024 15:23:45	04/05/2024 15:26:58	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Closed (Pending)	Smith NP, Carrie M.	04/05/2024 15:17:55	fluoxetine 20 mg/5 ml (4 mg/ml) oral solution	04/05/2024 15:17:56	04/05/2024 15:17:56	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Closed (Pending)	Smith MD, Gregory A.	04/05/2024 17:58:11	Adal 200 mg tablet	04/05/2024 17:58:11	04/05/2024 15:38:18	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Closed (Pending)	Smith MD, Gregory A.	04/05/2024 17:58:11	Adal 200 mg tablet	04/05/2024 17:58:11	04/05/2024 15:38:29	cbatou	ePA Word Doc
Gumbly, Jones	Open	Bertoli MD, Vincent C.	04/09/2024 13:39:49	Suboxone 8 mg 2 mg sublingual film	04/09/2025 13:39:54	04/09/2024 09:39:45	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Open	Bertoli MD, Vincent C.	07/18/2024 19:32:05	Adderall XR 5 mg capsule/extended release	07/18/2025 19:32:10	07/18/2024 13:32:15	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Open	Bertoli MD, Vincent C.	07/18/2024 19:32:15	Adderall XR 5 mg capsule/extended release	07/18/2025 19:32:20	07/18/2024 13:32:41	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Open	Bertoli MD, Vincent C.	07/18/2024 19:34:36	Adderall XR 5 mg capsule/extended release	07/18/2025 19:34:41	07/18/2024 13:35:02	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Open	Bertoli MD, Vincent C.	07/18/2024 19:36:15	Adderall XR 5 mg capsule/extended release	07/18/2025 19:36:20	07/18/2024 13:36:41	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Open	Bertoli MD, Vincent C.	07/18/2024 19:37:50	Adderall XR 5 mg capsule/extended release	07/18/2025 19:37:55	07/18/2024 13:38:17	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Open	Bertoli MD, Vincent C.	07/18/2024 19:37:58	Adderall XR 5 mg capsule/extended release	07/18/2025 19:38:03	07/18/2024 13:38:29	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Open	Bertoli MD, Vincent C.	07/18/2024 19:38:08	Adderall XR 5 mg capsule/extended release	07/18/2025 19:38:13	07/18/2024 13:38:34	cbatou	ePA Word Doc
account, test F. Si (CKCC)	Open	Bertoli MD, Vincent C.	07/18/2024 19:47:08	ketamine 100 mg/ml injection solution	07/18/2025 19:47:13	07/18/2024 13:47:24	cbatou	ePA Word Doc

The screenshots show the following steps:

- Initial state: The ePA request is in 'Open' status.
- Transition: The status changes to 'Completed (Externally)'.
- Comment: A comment is added: 'The pharmacy already has an approved ePA'.
- Final state: The ePA request is fully updated to 'Completed (Externally)' with the comment.

- U19023 - IdenTrust Contract Alert for active IdenTrust users:** Using the existing contract feature - we added a contract notification that will present for users with Enabled and non-expired IdenTrust EPCS

certs to inform these users not to renew with IdenTrust because we have recently learned that the IdenTrust policy is that they will not issue a refunds. This contract alert presents to the user at login at 100 days prior to the expiration of the users IdenTrust EPCS cert to catch them before the IdenTrust notices are received. We have additional Q1 work scheduled in the coming sprints to present additional log in notifications until such time as the user's IdenTrust cert is no longer Enable or has expired.

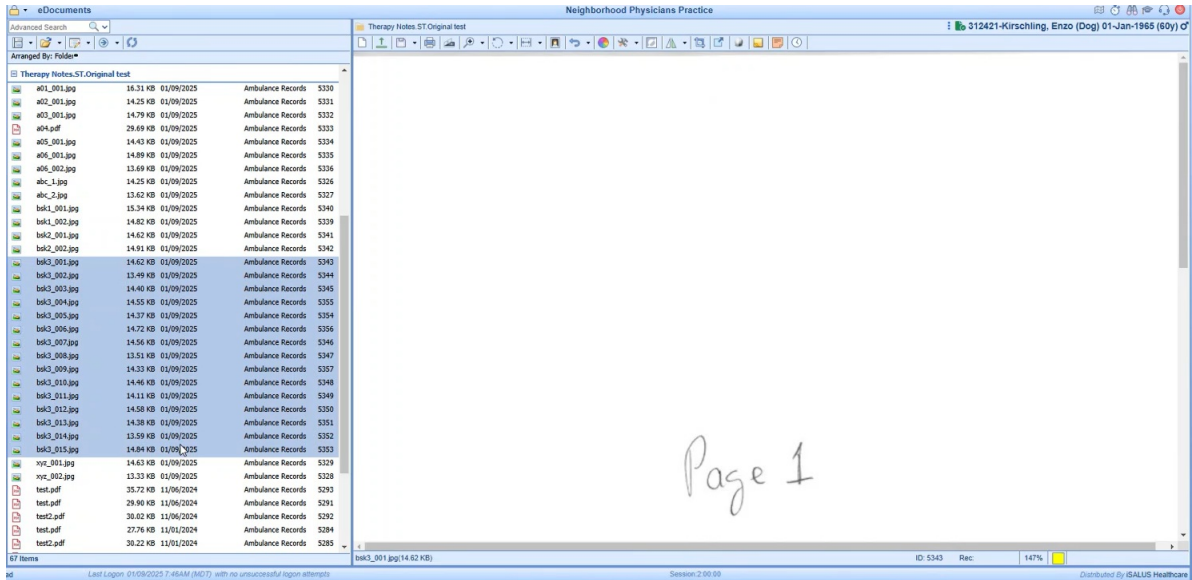


eDocuments

Scanning

- U19023 - Resolved eDocument ADF Scanning Issues: We have resolved two issues affecting batch scanning of eDocuments using an automatic document feeder (ADF) scanner: 1) scanned documents were not preserving the intended order and 2) random pages were missing from the batch. These issues caused users to spend time searching for and reordering pages, increasing the risk of misfiled documents.

To address this, we now append page numbering to each page scanned and validate the page scanned count with the successful page uploaded count to ensure all scanned pages are accounted for and correctly ordered. When a user scans a batch of documents (e.g., 15 pages) and assigns a filename (e.g., "BSK3"), each page is now automatically labeled with an appended sequential number in a two-digit format: Page 1 would be BSK3_01, Page 2 would be BSK3_02, and so on. The last page scanned should have a page number suffix that matches the total number of pages scanned. In this example, the last page would be Page 15 and would be named BSK3_15, where the '15' represents the total page count. This process supports up to 999 pages scanned per batch.



eDocuments						
Advanced Search						
Arranged By: Folder						
Therapy Notes.ST.Original test						
	a01_001.jpg	16.31 KB	01/09/2025	Ambulance Records	5330	
	a02_001.jpg	14.25 KB	01/09/2025	Ambulance Records	5331	
	a03_001.jpg	14.79 KB	01/09/2025	Ambulance Records	5332	
	a04.pdf	29.69 KB	01/09/2025	Ambulance Records	5333	
	a05_001.jpg	14.43 KB	01/09/2025	Ambulance Records	5334	
	a06_001.jpg	14.89 KB	01/09/2025	Ambulance Records	5335	
	a06_002.jpg	13.69 KB	01/09/2025	Ambulance Records	5336	
	abc_1.jpg	14.25 KB	01/09/2025	Ambulance Records	5326	
	abc_2.jpg	13.62 KB	01/09/2025	Ambulance Records	5327	
	bsk1_001.jpg	15.34 KB	01/09/2025	Ambulance Records	5340	
	bsk1_002.jpg	14.82 KB	01/09/2025	Ambulance Records	5339	
	bsk2_001.jpg	14.62 KB	01/09/2025	Ambulance Records	5341	
	bsk2_002.jpg	14.91 KB	01/09/2025	Ambulance Records	5342	
	bsk3_001.jpg	14.62 KB	01/09/2025	Ambulance Records	5343	
	bsk3_002.jpg	13.49 KB	01/09/2025	Ambulance Records	5344	
	bsk3_003.jpg	14.40 KB	01/09/2025	Ambulance Records	5345	
	bsk3_004.jpg	14.55 KB	01/09/2025	Ambulance Records	5355	
	bsk3_005.jpg	14.37 KB	01/09/2025	Ambulance Records	5354	
	bsk3_006.jpg	14.72 KB	01/09/2025	Ambulance Records	5356	
	bsk3_007.jpg	14.56 KB	01/09/2025	Ambulance Records	5346	
	bsk3_008.jpg	13.51 KB	01/09/2025	Ambulance Records	5347	
	bsk3_009.jpg	14.33 KB	01/09/2025	Ambulance Records	5357	
	bsk3_010.jpg	14.46 KB	01/09/2025	Ambulance Records	5348	
	bsk3_011.jpg	14.11 KB	01/09/2025	Ambulance Records	5349	
	bsk3_012.jpg	14.58 KB	01/09/2025	Ambulance Records	5350	
	bsk3_013.jpg	14.38 KB	01/09/2025	Ambulance Records	5351	
	bsk3_014.jpg	13.59 KB	01/09/2025	Ambulance Records	5352	
	bsk3_015.jpg	14.84 KB	01/09/2025	Ambulance Records	5353	
	xyz_001.jpg	14.63 KB	01/09/2025	Ambulance Records	5329	
	xyz_002.jpg	13.33 KB	01/09/2025	Ambulance Records	5328	
	test.pdf	35.72 KB	11/06/2024	Ambulance Records	5293	
	test.pdf	29.90 KB	11/06/2024	Ambulance Records	5291	
	test2.pdf	30.02 KB	11/06/2024	Ambulance Records	5292	
	test.pdf	27.76 KB	11/01/2024	Ambulance Records	5284	
	test2.pdf	30.22 KB	11/01/2024	Ambulance Records	5285	

67 Items

Last Logon 01/09/2025 7:46AM (MDT) with no unsuccessful logon attempts

Bug Fixes

iScheduler

Cost Estimator

- B18998 - Cost Estimator Eligibility Benefits Not Populating "In Network" Values: Corrected an issue that caused a specific eligibility response for the cost estimate to display benefits as "Out of Network" instead of populating the "In Network" values.

Billing

Claim Query

- B17041 - Statement Processing Causing Multiple System Claim Comments: Resolved an issue that caused claims processed for statements to have multiple EDI claim comments added, instead of only one system claim comment per statement batch. A fix has been implemented in this process to prevent this duplication.
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