Release 25.131 - March 20, 2025

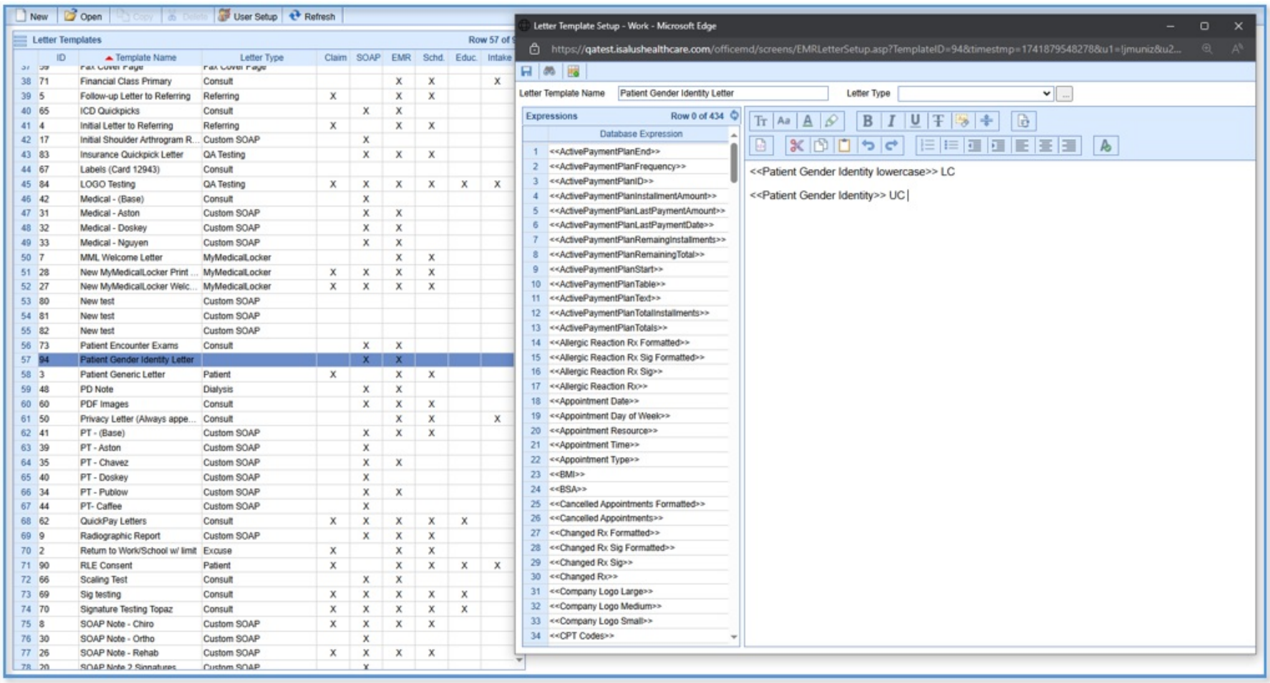
Last Modified on 04/29/2025 4:11 pm EDT

Enhancements | Resolutions

Enhancements

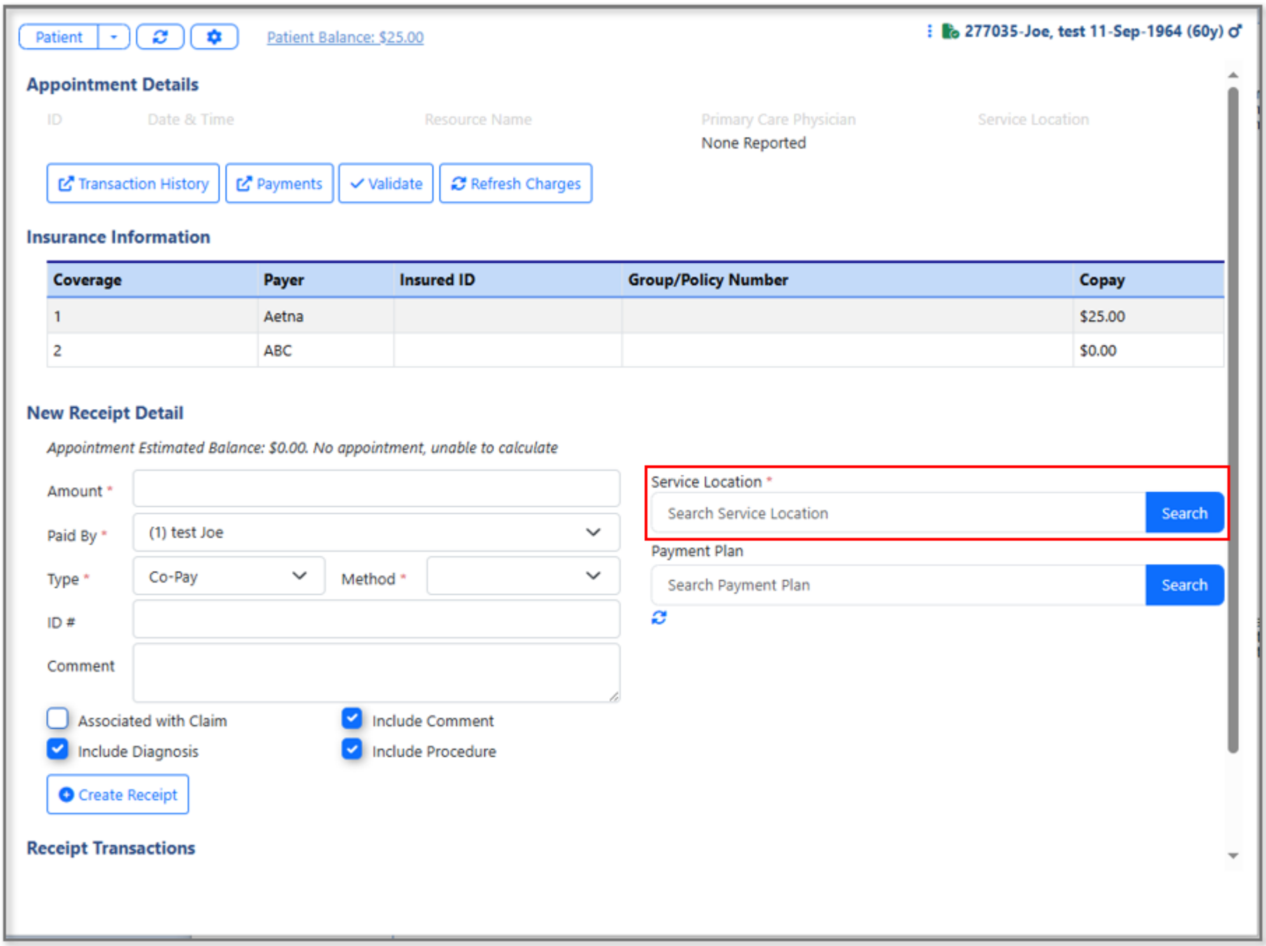
New Gender Identity Letters Quick Picks

U19167: A new quick pick has been added to the Setup > Letters screen called <<**Patient Gender Identity Letter**>>. When added, this Quick Pick will support the updated Gender Identity patient demographics field. The template will include 2 quick picks named <<**Patient Gender Identity**>> and <<**Patient Gender Identity lowercase**>>, which will pull the gender identity from the Patient Demographics > Gender Identity field.



Default Service Location Setting for the New Quick Pay Window

U19603: When the new **Quick Pay** window is opened without a connection to an appointment (e.g., from the **Patient Setup** > **More** menu), the Service Location field is blank, requiring the user to set one before processing a payment. To resolve this issue, we added code that automatically sets the service location to the user's default service location when the **Quick Pay** window is opened without a connection to an appointment.



Beta feature - Vital Summary screen optimization & user enhancements

E17250: In Q3 2024, we launched a major initiative to modernize our lab result data framework, **Fishbones**, with a focus on optimizing system performance. This update was foundational to the additional enhancements outlined in these notes. Most of these improvements are currently behind a feature flag, requiring back-end activation during the **Beta phase beginning this release and available until 4/17/2025.** On **4/18/2025**, the updated framework will be rolled out to all client databases.

Knowledge base article

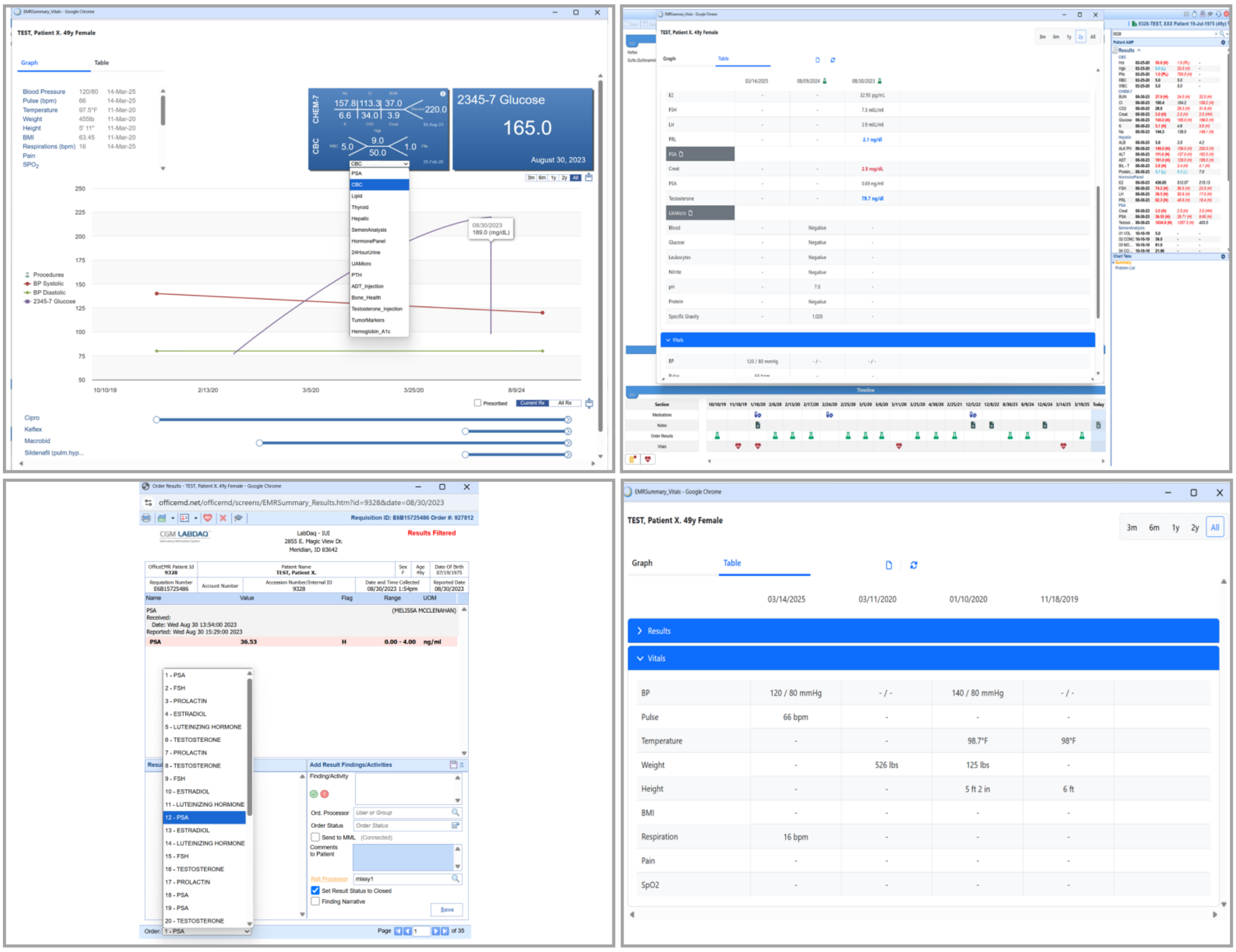
Vital Summary Screen Enhancements

Users transitioning to the modernized Vital Summary screen will experience:

- **Seamless Transition** – No setup required; existing Company and User settings will be applied
- **Optimized Performance** – Faster loading of vital and result data
- **Expanded Access** – More entry points for launching the Vital Summary screen
- **Enhanced Vitals Graph View** – Improved performance and data visualization
- **Updated Fishbone Selection** – Replaced radio buttons with a streamlined drop-down menu
- **Modernized Vitals Table View** – Faster data retrieval and improved usability
- **Collapsible Table Sections** – Streamlined Result and Vitals data views for better trend analysis
- **Integrated Lab Result Reports** – Quick access via the result flask icon in Table View

- **Efficient Test Result Lookup** – Order names now accessible within Lab Result reports

These updates provide a faster, more intuitive experience, improving data accessibility and usability for all users. **Please reach out to support to become a Beta partner for this feature.**



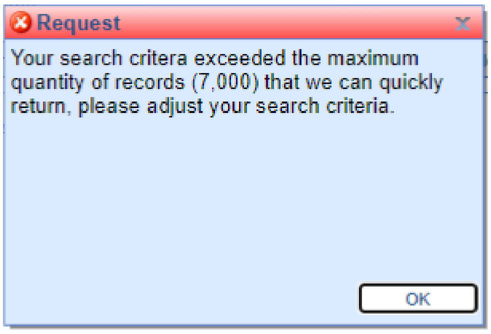
Resolutions

Credit Balance Payment Transfer Allowing Transfer Amount on Source Claim to be More than the Destination Claim Amount

B18860: Corrected an issue where, when using the credit balance screen to transfer a credit, the system allowed the transfer amount from the source claim to exceed the allocated amount on the destination claim without providing any error message. To fix this issue, we added code that will disable the Save button and display an error message if the allocated amount of destination claims is less than the credited amount total, prompting the user to take corrective action before the Save button becomes enabled again.

Deposit Creation Search Criteria Error

B19004: Corrected an issue where, when a user accessed the Deposit window from the Revenue Cycle Wheel (Billing > Post > New Deposits) and chose to create a new deposit, upon completing and saving the deposit, if they selected "No" on the prompt to create a new deposit, they would receive an error message on the request.

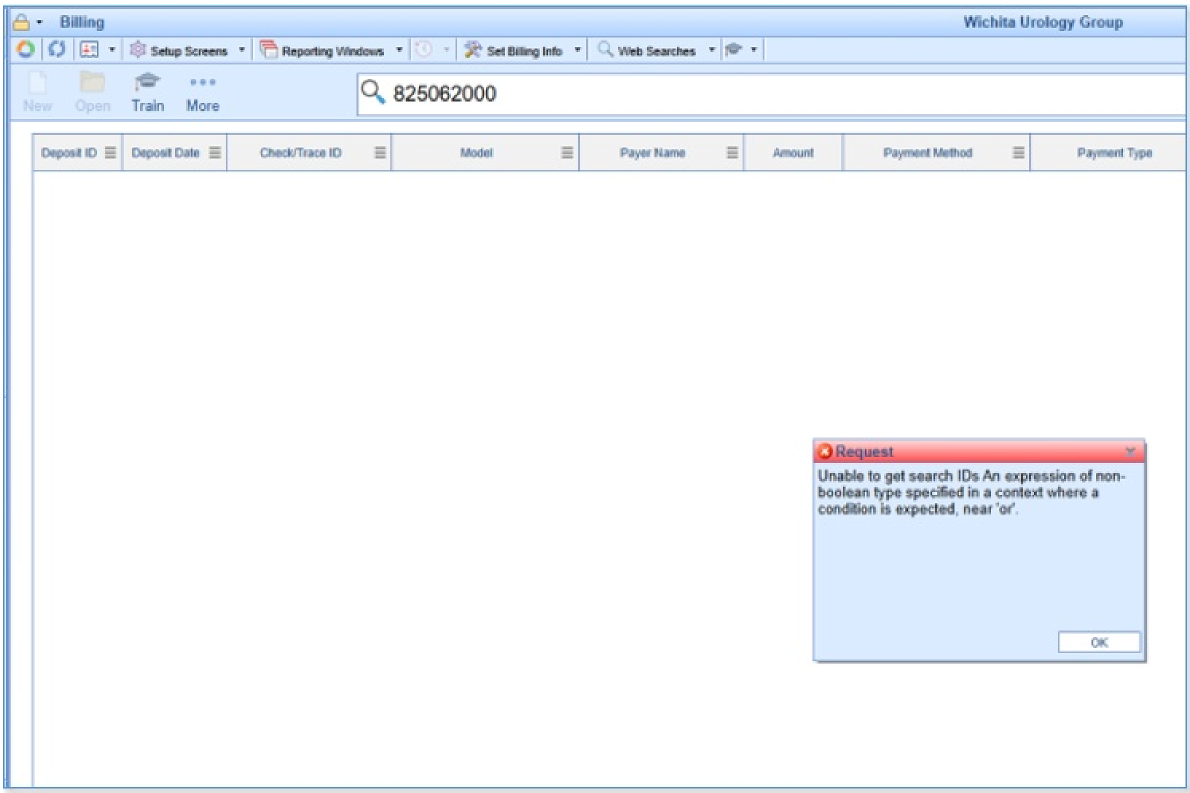


Patient Cost Estimator Not Populating New Eligibility Check Info After A Recheck

B19456: When generating an estimate, if the patient has not had an eligibility check within the allowed date range for the patient cost estimator tool, a new eligibility check is required. However, even after rechecking eligibility, the Cost Estimator Tool continued to display the message "You need to run a new eligibility check or manually enter benefits," and the updated values were not populating in the cost estimator. This meant that to load the new values, the user had to refresh the screen or completely close and reopen the cost estimator. To correct this, we added a broadcast on the legacy eligibility check screen so that when a new eligibility check is performed, it notifies and refreshes the Cost Estimator.

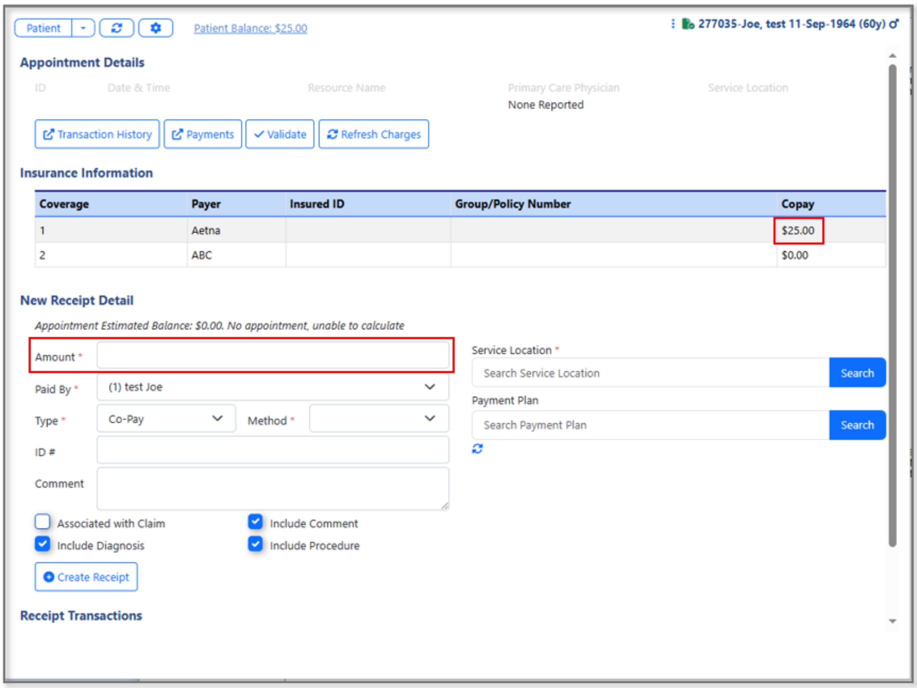
Deposit Check Number Search Error

B19585: Corrected an issue from release 25.130 where, when performing a check number search in the deposit window using the quick search, the user either encounters an error if multiple items partially match the check number or no results appear. The check number search criteria was removed from the quick search, it is found under the advanced search criteria.



Quick Pay Window Not Populating the Copay Amount

B19587: Corrected an issue where the new Quick Pay window did not populate the copay amount when opened if the patient had a primary insurance copay. We have resolved this so that the copay amount can be added when the copay dropdown is selected for a patient with a primary insurance copay.



Enabled The Print Receipt Button on the New Quick Pay Window

B19581: On the new Quick Pay window, the Print Receipt button is disabled unless the user either creates a receipt or takes a payment. In contrast, on the previous Quick Pay window, the Print Receipt button was always enabled. Some practices have incorporated printing the receipt as part of their standard workflow, even when no payment is taken, in order to provide the patient with information about their upcoming appointments. In this release, we removed the receipt blocker when printing and enabled the Print Receipt button on the Quick Pay window, even when no receipt is created.

Deposit ERA Import Not Populating Claim Level

B19495: Corrected an issue within Billing > Deposits where, when importing an ERA file to create a deposit, the Claim Level field was not being set based on the ERA response.

Deposit Claim Posting Error (Missing Procedures) Unclickable Checkboxes

B13989: Corrected an issue specific to ERA responses with no procedures and only a claim associated with it, where, when resolving a Deposit Claim Error for Missing Procedures, the checkboxes were not selectable. Users could select the top checkbox to "check all," but not the individual checkboxes. To address this issue, we implemented an update that will improve the positioning of the checkboxes and guarantee their clickability.

Quick Pay Window Claim Tab Not Populating Appointment Date

B19610: Resolved an issue causing the Claim tab under the new Quick Pay window to not populate the DOS as the appointment date when the Quick Pay is opened from an appointment. This issue arose because the code did not account for a resource on the schedule that was not a provider and used an inner join to combine the appointment and provider tables, causing the appointment date not to populate correctly.

Optimized the Connect Report > Reconciliation Charge Report

B19380: Updated the Reconciliation Charge Connect Report to improve its performance and allow it to run in UOI for a month's worth of data without timing out. We revised the code to use the ClaimBillingMaterialized table to obtain the claim list and procedure list, thus eliminating the need for those two user-defined functions.

Unable To Yield Results When Searching by Procedure Code

B19590: Corrected an issue stemming from release 25.130 where searching for a procedure code in the Code Search window (Billing > Setup Screens > Procedures) using the quick search yielded no results. We have applied an update to both procedure code and diagnosis code searches to ensure correct results populate when using a basic quick search.