Release 26.165 - August 13th, 2026

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New features | **Enhancements** | **Resolutions** | **Beta Program**

Highlights

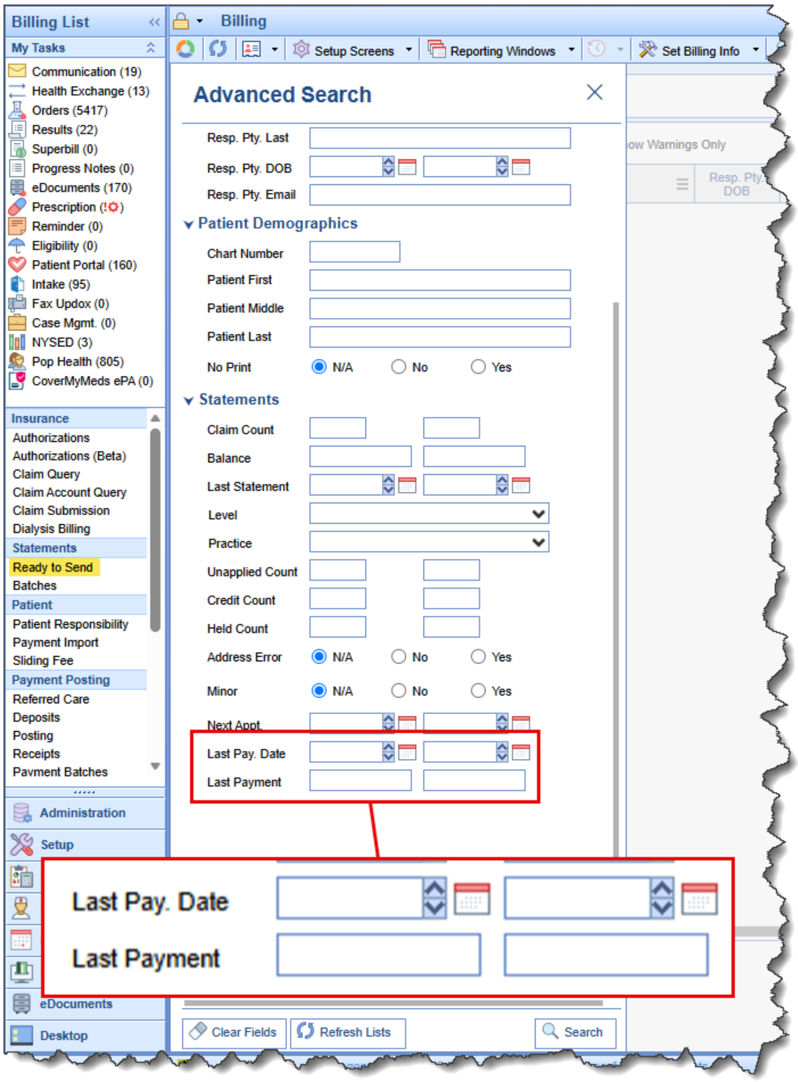
New features

Ready to Send Statement – New Last Payment Date & Amount Display Setting

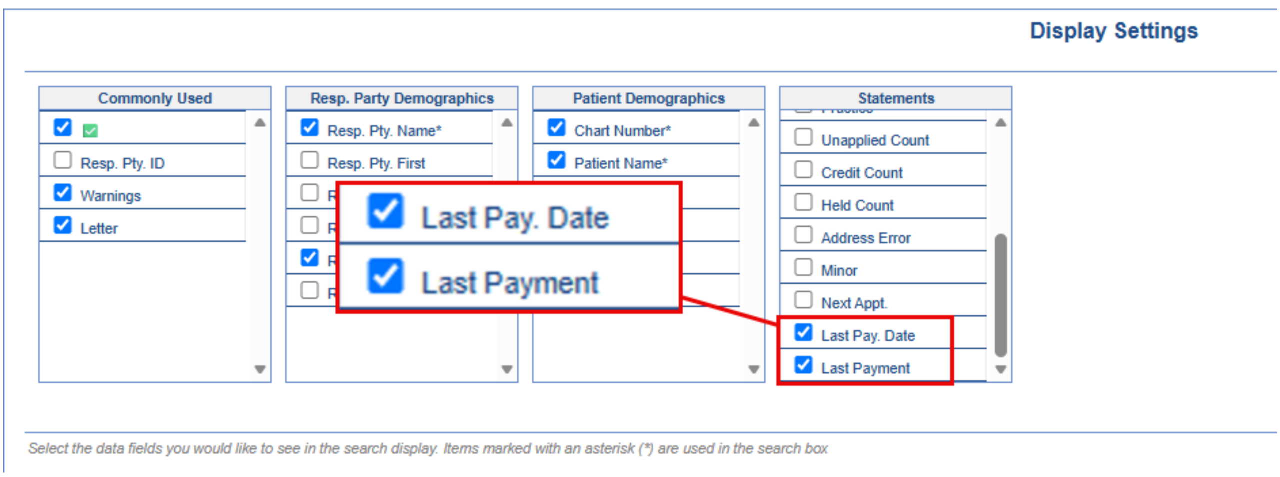
ISL- 8550: The **Ready to Send Statement** window now supports displaying the patient's last payment date and amount, giving billing staff quicker visibility into recent payment activity without leaving the statement workflow. When enabled, these columns show the most recent payment made toward the patient's account by their responsible party. If a patient has more than one responsible party, the displayed date and amount will reflect the most recent payment made by either party, ensuring the information shown is always the latest, regardless of who made the payment. If no responsible party payment exists for the patient, the **Last Payment Date** and **Last Payment Amount** fields will simply display blank.

Both fields have also been added as **Advanced Search parameters**, allowing users to filter statements by:

- **Last Payment Date** (as a date range)
- **Last Payment Amount** (as an amount range)

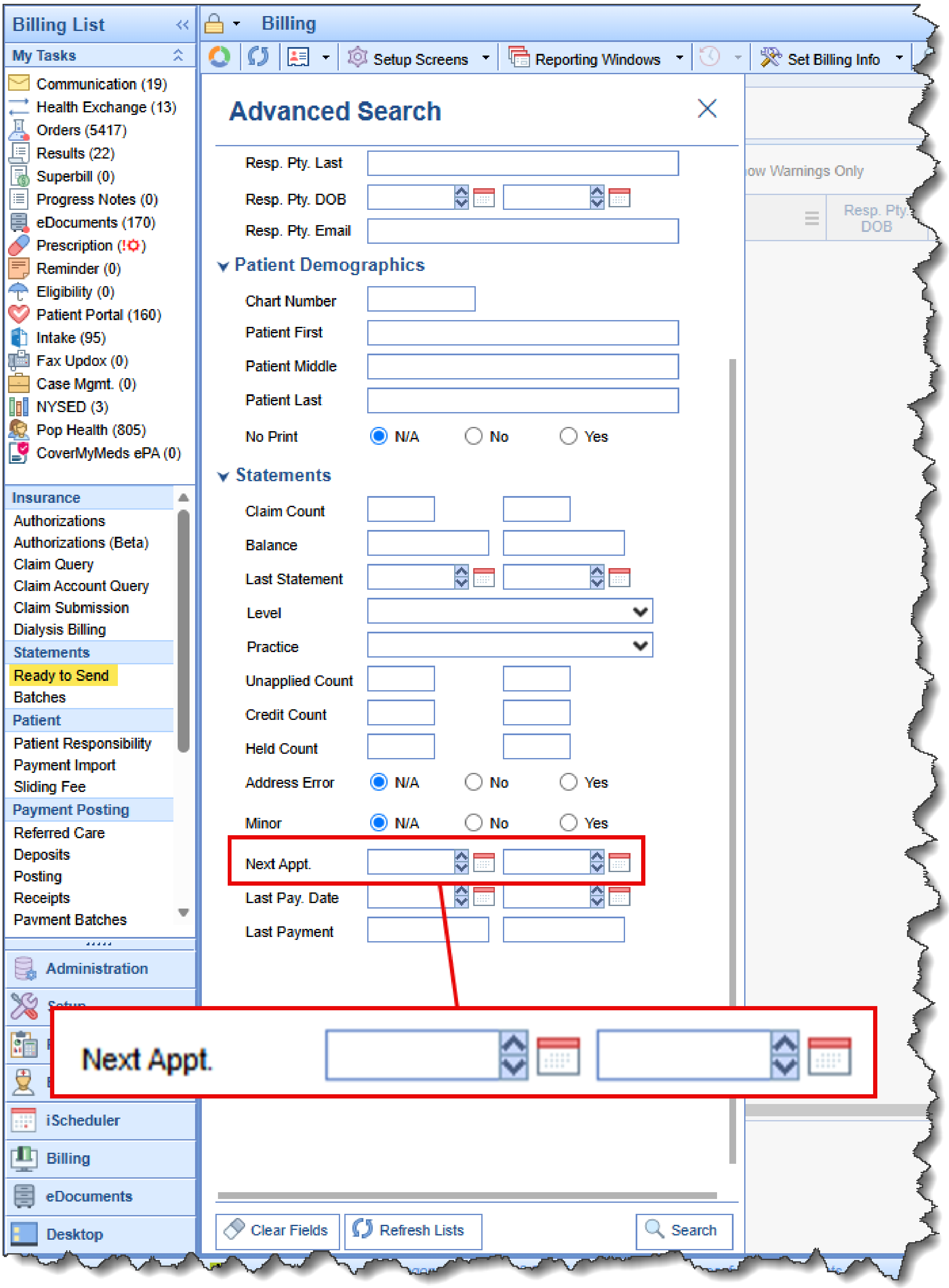


To Enable the columns go to Billing > Statements > Ready to Send > More > Change Display Settings and select Last Pay. Date & Last Payment.

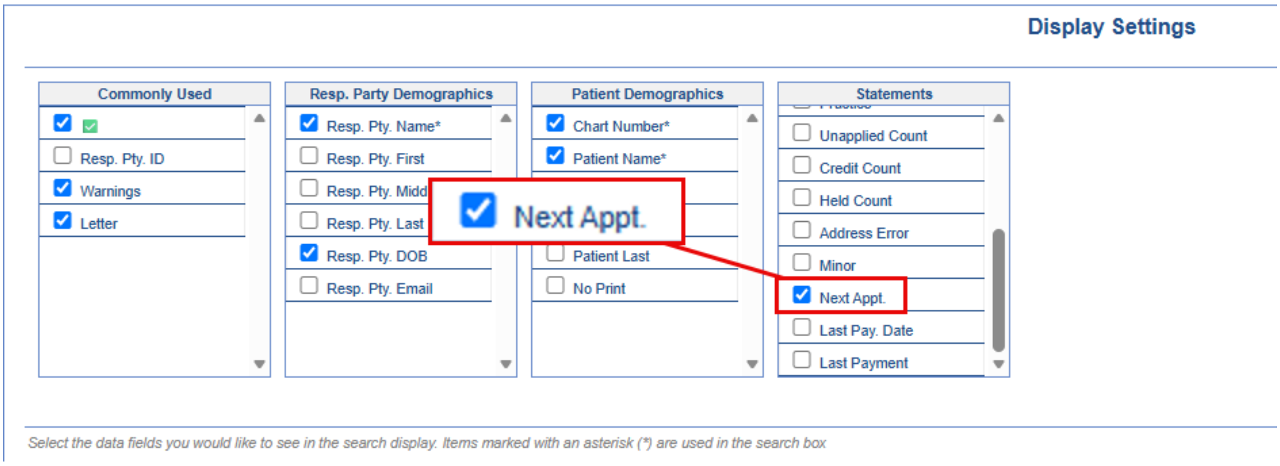


Ready to Send Statement – Next Appointment Display Setting

ISL- 7883 The **Ready to Send Statement** window now also supports displaying a patient's next upcoming appointment, giving billing staff useful context about scheduled visits directly within the statement workflow. When enabled, this new column displays the patient's **first future appointment** (i.e., the earliest appointment with a date/time greater than today), shown with both date and time. This enhancement gives billing staff added context when reviewing statements helping identify patients with upcoming visits, which can be useful for coordinating statement timing, in-office collections, or follow-up communication.



To Enable the Next Appointment column go to Billing > Statements > Ready to Send > More > Change Display Settings and select Next Appt.



Enhancements

Scheduler Analytics Cube – Appointment Insurance Section Added

ISL- 8403: The **Scheduler Analytics Cube** now includes appointment-level insurance information, giving users the ability to analyze and report on scheduling data alongside the insurance details captured at the time of the appointment. We added the following new sections to the Scheduler Analytics Cube:

- **Insurance Profile**
- **Primary Payer**
- **Secondary Payer**
- **Tertiary Payer**

These fields reflect the insurance information as it was set on the appointment itself, allowing for accurate historical reporting and analysis. It allows practices to build reports and analyses that incorporate insurance context directly into scheduling data, supporting use cases such as:

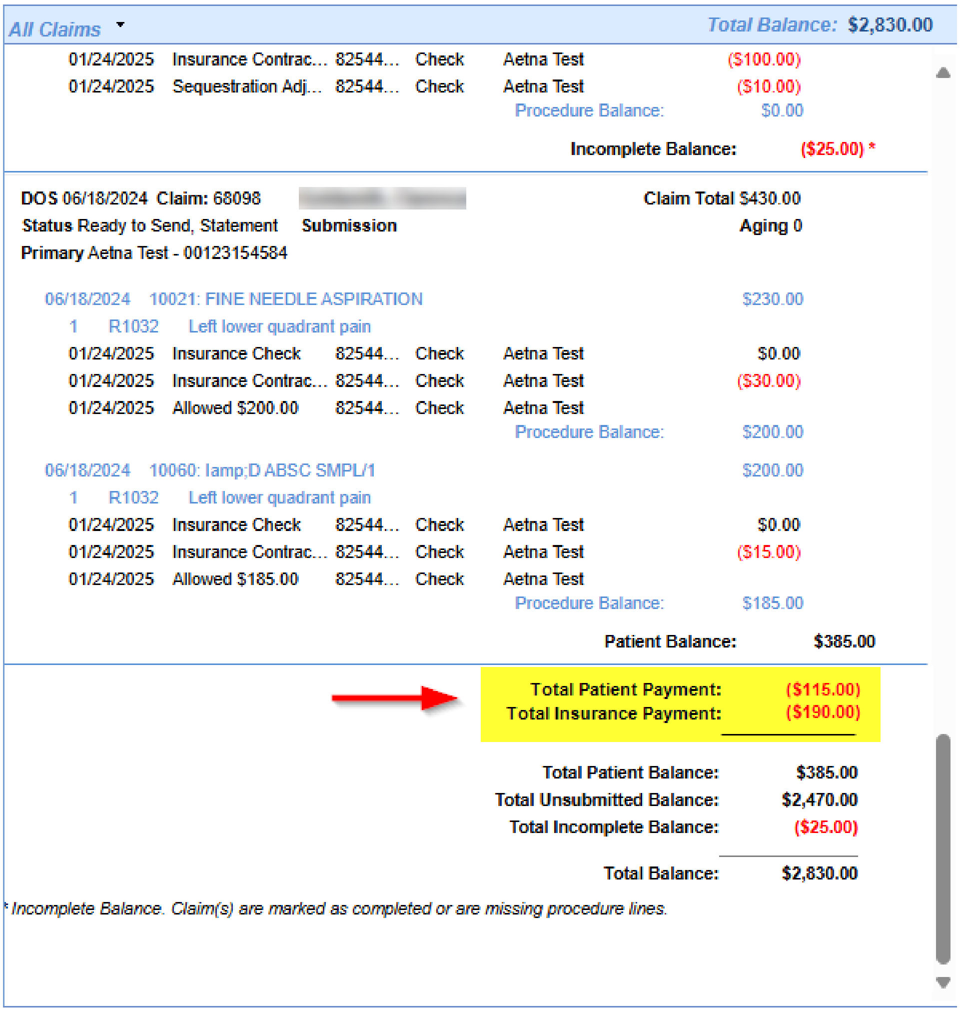
- Identifying scheduling trends by insurance profile or payer
- Analyzing appointment volume by primary, secondary, or tertiary insurance
- Cross-referencing scheduling and insurance data without needing to pull from multiple sources

Total Patient & Insurance Payment Added to Patient Transaction History

ISL-7258: The **Patient Transaction History** screen now displays running totals for patient and insurance payments, so users can instantly see how much a patient or insurance has paid toward a claim without manually adding up individual line items. The new display options are:

- **Total Patient Payment**: Reflects the sum of all responsible party payments.
  - When viewing an **individual claim**, the total reflects patient payments for that claim only.
  - When viewing **multiple claims**, the total reflects the combined patient payments across all claims displayed.
- **Total Insurance Payment**: Reflects the sum of all insurance payments.
  - When viewing an **individual claim**, the total reflects insurance payments for that claim only.
  - When viewing **multiple claims**, the total reflects the combined insurance payments across all claims displayed.

This gives front-desk and billing staff an at-a-glance view of payment activity when a patient calls in, eliminating the need to manually tally individual payment line items to answer questions like "How much have I paid so far?"



Security Report – Time Zone Update

ISL- 4991: Previously, the **Security report** found under the **Reports portal** > **Audit section** always displayed log timestamps in **EDT**, regardless of the time zone actually configured for the client's database. This caused a mismatch for clients on other time zones. For example, a database set to **PDT** or **MDT** would still show log activity in EDT, leading to confusing or inaccurate timestamps.

In this release, the **Security report** has been updated to correctly display log dates and times based on each client's database-configured time zone, rather than always displaying in Eastern Time (EDT). This ensures audit and security log timestamps are accurate and meaningful for every client, regardless of their database's time zone.

Desktop Gadgets – Graphs Upgraded to Syncfusion

ISL- 8620: We upgraded the graphs displayed within **Desktop Gadgets** from HighCharts to **Syncfusion**, our new charting library. This update modernizes the underlying charting technology that powers Desktop Gadgets, ensuring continued reliability and vendor support while keeping the look, feel, and functionality exactly as users expect. This release focuses on preserving everything users already know and rely on. Sector labels continue to display as expected, and hovering over any point on a graph still shows the corresponding label and value. Users can still expand any graph into full screen view, print it directly, or download it in PNG, JPEG, PDF, or SVG format, just as they could previously.

Allergy Screen – UI Aligned to Syncfusion Design

ISL- 8330: The modernized Allergy screen, previously built using our legacy Vue component set, has also been visually realigned to match our newer Syncfusion design. This update brings the Allergy screen's look and feel in line with the Problems screen modernization, creating a more consistent experience across modernized areas of OfficeEMR. This release is focused purely on visual and component alignment rather than new functionality. The legacy Vue UI components used throughout the Allergy screen have been replaced with their Syncfusion equivalents. All existing behavior and workflows remain exactly as they were; only the visual presentation and underlying UI components have changed. The screen also continues to be accessible only through the existing modernization and beta flag configuration, now managed through the new Beta Flag screen in the Admin portal.

Aligning the Allergy screen to the Syncfusion design system ensures a consistent, modern look and feel across the application as more screens are modernized, while laying the groundwork for a smoother transition into QA and Beta testing.

Resolutions

Fixed: PM Reports – Patient Transaction History Column Alignment

ISL-11086: We resolved a column alignment issue in the **Patient Transaction History** report that could occur when a claim contained a large number of payments, such as a claim with 39 payments spanning roughly 43 rows, causing the report's page-break logic to split that claim across two pages in a way that separated the claim information from its associated procedure and payment rows. Because the claim's row was designed to span all of its related rows as a single connected block, splitting it across pages caused everything on the following page to shift one column to the left. As a result, values like the Balance column would appear misaligned and no longer line up under their correct headers.

In this release, we updated the report's page-break logic so that when a single claim is too large to fit within a full page on its own, it's now allowed to run long on that page rather than being split apart from its related rows. This keeps the claim information and all of its associated procedure and payment rows together in the same table on the same page, preserving correct column alignment throughout the report.

Fixed: Down-Coding Report – Remark Code Filtering, Claim Status, and Scrolling

ISL-14321: This release addresses three reported issues with the **Down-Coding report**, improving how remark codes are filtered and displayed, updated the claim status value to reflect current status value, and fixing scrolling behavior on the drilldown when viewing large result sets.

Remark Code Filtering and Display

Previously, the Down-Coding report's drilldown only filtered and grouped by claim-level remark codes (MOA), even though procedure-level remark codes (LQ) were also being pulled correctly from the claim. This meant that remarks tied specifically to a procedure weren't being reflected in filtering or grouping, even though the underlying data existed.

To resolve this, the drilldown now separates and displays remark codes more clearly. Claim-level remarks are broken out into **RARC 1**, **RARC 2**, and an **Other RARCs** column, which lists any additional remarks (3–5) concatenated together. Procedure-level remarks now follow the same structure, displayed as **PRC RARC 1**, **PRC RARC 2**, and **PRC Other RARCs**.

To keep the drilldown easier to scan, remark code columns now display just the code itself rather than the full description, with the complete description available on hover via tooltip. Most importantly, filtering and grouping by remark code now takes both claim remarks and procedure remarks into account, so procedure-level remarks are no longer excluded from results.

Claim Status Accuracy

The drilldown was previously displaying the claim status as it existed at the time the deposit was posted, rather than the claim's current status. This has been corrected so the drilldown now reflects the claim's **current status**, giving users an accurate, up-to-date view when reviewing down-coded claims.

Scrolling and Pagination Display

When viewing the drilldown with a high number of items per page, such as 50 or 100, the footer and column headers would scroll out of view, making it difficult to navigate or read the table without scrolling all the way down first. This has been fixed: the column headers now stay fixed in place while scrolling vertically, and the footer remains visible, allowing users to scroll and navigate the table more easily regardless of page size.

Fixed: Billing Analytics – Download Link Fix

ISL-14149: We resolved an issue occurring when downloading the **Billing Analytics** from the Billing portal. Previously, attempting to download Billing Analytics from the Billing portal resulted in an invalid link and a connection error, preventing users from opening the .odc file. The broken download link has been corrected, and Billing Analytics can now be downloaded successfully from the Billing portal without encountering a connection error.

Quick Pay Screen Receipt Transactions Not Refreshing After Taking a Credit Card Payment

ISL-14396: Corrected an issue on the QuickPay window where, after a credit card payment was taken and the credit card screen was closed, the Receipt Transactions were not refreshed to reflect the payment.

Beta Program

As iSalus modernizes the application, there is an option to opt in to early access to a specific feature and provide feedback before releasing it to all users or deprecating a legacy version. Below is the list of items available for your team to enable. Read more about the Beta Program

Name & Description	Status
EverHealth Scribe *Ambient AI Scribe for drafting Notes and managing the Problem List*	**Closed Beta Until 8/28**
Modernized Allergies *Modernized Allergies screen within the EMR to better manage a patient's allergies.*	**Coming Soon (TBA)**
Modernized Problem List *Modernized Problem List Screen for efficient management of patient Diagnoses and ongoing management of chronic problems.*	**Available 8/17**

Name & Description	Status
Modern Patient Summary & Demographics *Updated Patient Demographics, allowing for starred contacts for a patient, reorganization of patient demographics sections, and simplification of the patient summary screen, allowing for customization by the user.*	**Available 8/17**