

Billing System Release Notes - 2026-03-08

New and Updated Features

Statements

Updates to Statement Default Options (the Statement Setup Add/Edit Screen)

- **Statement Setup and Configuration section:**

- The Statement Address To option has been removed. This option previously appeared right after the Statement Mode option.
- The options for Statement Mode have been updated:
 - **One Statement Per Guarantor** - Generate one Statement per Guarantor account. Each Statement combines the Guarantor's outstanding claims and all other Patient claims the Guarantor is responsible for. Statements generated in this mode will always be addressed to the Guarantor.
 - **One Statement Per Patient** - Generate one Statement per Patient account. All outstanding claims for each Patient are shown in one statement. Statements generated in this mode will always be addressed to the Patient.
 - The previous One Statement Per Claim option has been combined into two new options:
 - **One Statement per Claim addressed to the Guarantor** - Generate one Statement per Claim. Patients will receive one Statement for each outstanding Claim addressed to the Guarantor.
 - **One Statement per Claim addressed to the Patient** - Generate one Statement per Claim. Patients will receive one Statement for each outstanding Claim addressed to the Patient.
 - The Statement Mode option only applies to Statements printed from the Collection Manager and does not apply to Statements printed from the Patient Dashboard.

- **Single Patient Statement Setup section:**

- The title of this section has been changed to **Patient Dashboard Statement Printing**.
- The options in this section only apply when printing statements from the Patient Dashboard by clicking the Patient Statement button.
- A new option was added to this section called **Address To**:
 - **One Statement per Guarantor** - When this option is selected, the Patient Statement button prints all statements addressed to the Guarantor of the claim(s). Each Statement

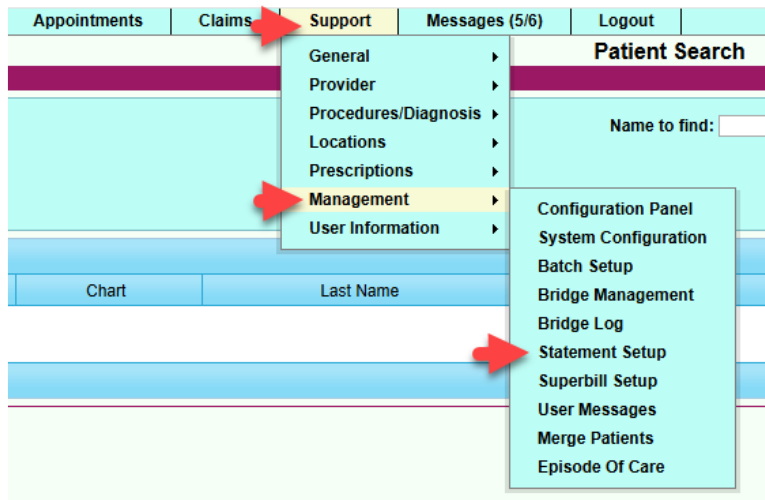
contains only the patient's outstanding claims for which that guarantor is responsible and is addressed to that specific Guarantor.

- **One Statement per Responsible Party** - When this option is selected, the Patient Statement button prints all statements addressed to the Patient's Responsible Party, overriding the Guarantor of the claim(s). Each statement contains only the patient's outstanding claims, and they will all be addressed to the Responsible Party
- **One Statement per Patient** - When this option is selected, the Patient Statement button prints all statements addressed to the Patient, overriding the Guarantor of the claim(s). Each statement contains only the patient's outstanding claims, and they will all be addressed to the Patient.
- The Address To option only applies when printing Statements from the Patient Dashboard by clicking the Patient Statement button, and does not apply when printing Statements from the Collection Manager.
- The Statement Mode option does not apply to Patient Statements - overridden by the Address To option.

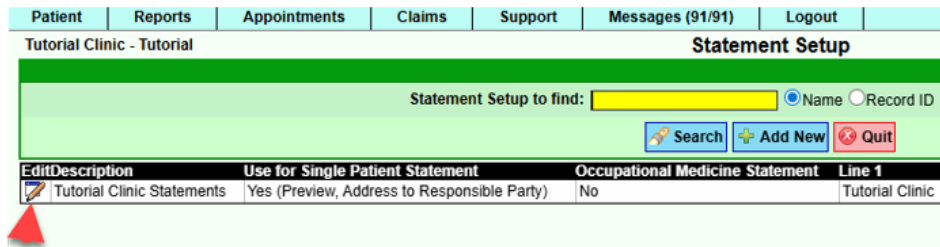
Updates to the Statement Setup Screen

- When viewing the list of setups on the Statement Setup screen, two new columns were added to the search results list:
 - **Use for Single Patient Statement**
 - Indicates which setup is used when generating single patient statements.
 - Displays No for setups that are not used for generating single patient statements.
 - For setups that are used for generating single patient statements, displays all of the options selected in the setup's Patient Dashboard Statement Printing section (found on the setup's edit screen).
 - **Occupational Medicine Statement**
 - Indicates which setups are used for Occupational Medicine Statements.
 - The values will be Yes or No, depending on what is selected for a setup's Occupational Medicine Statement option.

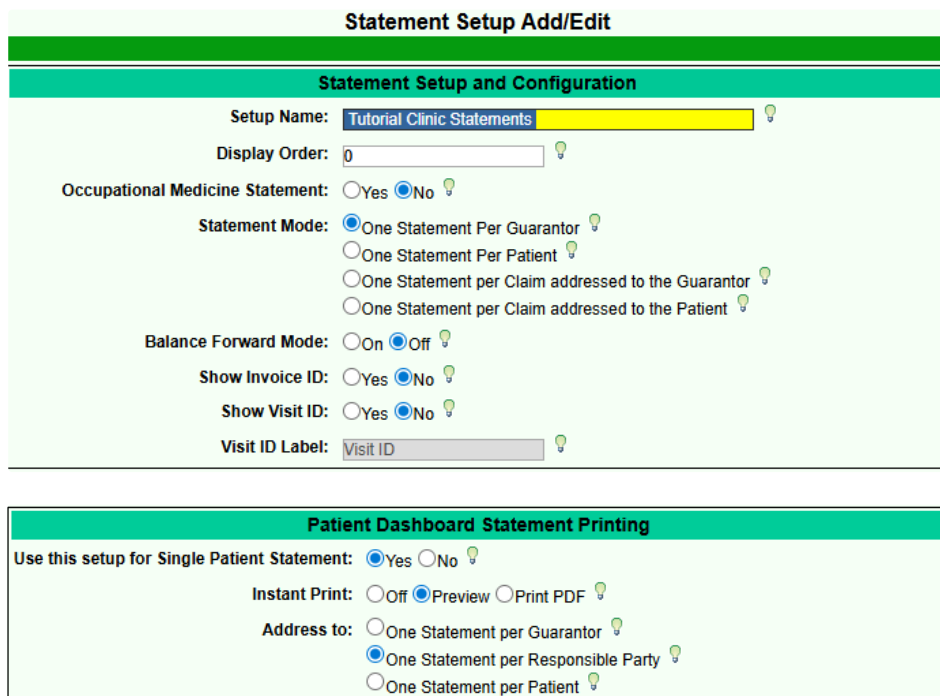
To access the Statement Setup, go to the Support tab>Management>Statement Setup:



The Statement Setup is the area where you will review/edit your current statement setup(s). You also have the ability to add a new statement setup.




Below are the sections of the Statement Setup with updates (New). The following example is of a Guarantor Statement setup. Please review to familiarize yourself with all of the available options and configurations.





Statement Setup prior to the recent update (Old):




Statement Setup Add/Edit



Statement Setup and Configuration


Setup Name: 


Display Order: 


Occupational Medicine Statement: Yes No 


Statement Mode: One Statement Per Guarantor 
 One Statement Per Patient 
 One Statement Per Claim 

Statement Address To: Address to Guarantor  Address to Patient 


Balance Forward Mode: On Off 


Show Invoice ID: Yes No 

Show Visit ID: Yes No 

Visit ID Label: 

Single Patient Statement Setup

Use this setup for Single Patient Statement: Yes No 

Instant Print: Off Preview Print PDF 

Note: Once you make updates or create a new statement setup, it is best practice to **preview** your changes in the Collection Manager before generating statements.

Updates to Printing Statements From the Patient Dashboard

- The previous button labeled Statement has been removed.
- The Statement button has been replaced with two new buttons (Guarantor Statement and Patient Statement):
 - **Guarantor Statement**
 - Prints one statement for each of a patient's guarantors (claim guarantors), or select a specific guarantor to generate a statement for.
 - Statements show claims for the guarantors, this patient and all other patients that the guarantors are responsible for.
 - Statements are always addressed to the guarantor.
 - The Statement Setup options for Statement Mode and Address To do not apply when clicking the Guarantor Statement button.
 - If there are either zero or multiple setups selected to be used for Single Patient Statements, select a setup from the dashboard without being redirected to the Collection Manager.
 - Zero selected - can select from any non occ med setup.
 - Multiple selected - can select from only the setups that are selected for Single Patient Statements.
 - **Patient Statement**

- Print a Statement for this Patient according to what value is selected for the Address To option in the Statement Setup selected to be used for generating single patient statements.
 - One Statement per Guarantor:
 - Print individual statements for each of this patient's guarantors (claim guarantors).
 - Each Statement contains only this patient's outstanding claims for which a Guarantor is responsible.
 - Statements are addressed to the Guarantor.
 - One Statement per Responsible Party:
 - Generates a single Statement that includes all of this patient's outstanding claims.
 - Statement is addressed to this patient's responsible party, overriding the Guarantor of the claim(s).
 - Address to Patient:
 - Generates a single statement that includes all of this patient's outstanding claims.
 - Statement is addressed to this Patient, overriding the Guarantor of the claim(s).
- If there are either zero or multiple setups selected to be used for Single Patient Statements, select a setup from the dashboard without being redirected to the Collection Manager.
 - Zero selected - can select from any non occ med setup.
 - Multiple selected - can select from only the setups that are selected for Single Patient Statements.

Patient Dashboard (Guarantor) - There are new buttons to generate [Guarantor Statement] [Patient Statement]. The illustration is from a Guarantor Account.

The screenshot displays the Patient Dashboard for a Guarantor account. The top navigation bar includes links for Patient, Reports, Appointments, Claims, Support, Messages (91/91), Logout, and Home. The dashboard title is 'Patient Dashboard' for 'Tutorial Clinic - Tutorial' with account #14518 and chart #14518. The user is identified as 'T Tutor' on Wednesday, Mar 4 2026, at 4:37 pm.

The main content area is divided into several sections:

- Patient Contact Information:** Guarantor Test, 123 Happy Street @1, Port Barre, LA 70577 USA. Home: (555) 555-5555, Cell: (555) 555-5555, Employer: none, E-mail: none.
- Other Patient Information:** Payment Terms, Chart #: 14518, Financial Class, Patient Payment: \$0.00, Billing Code: G, Payment Date: None, Last Visit Date: 07/29/2025, Last Diagnoses: A:110.
- Responsible Party:** #14518-Test, Guarantor, Relationship: Self.
- Demographics:** Date of Birth: 05/08/1990, Patient Age: 35 years, SS Number: -, Admin Sex: Female, Marital Status: Married, Student Status: None, Emerg. Contact: -, Emerg. Phone: -, Employer: -.
- Default Billing Information:** Provider: -, Referring Provider: -, Last Seen: -, Primary Care Pro: -, Default Location: -.
- Insurance Policies:** A table showing two policies: Primary (Aetna) and Secondary (Administrative Procedures).
- Guarantor Ledger:** A table showing financial details for the Guarantor, Patient, and Account, including Current, Insurance, Medicare, and Medicaid amounts.

At the bottom of the dashboard, there is a row of navigation buttons. The buttons for 'Guarantor Statement' and 'Patient Statement' are highlighted with red boxes, and a red arrow points to them from the bottom left.

The **Guarantor Statement** button will generate a statement addressed to the Guarantor for the claim(s).

The **Patient Statement** Button will generate a patient statement with only the patient's statement. This example is a Guarantor as well as a Patient.

Patient Dashboard (Patient linked to Guarantor) - Both the Guarantor Statement and Patient Statement buttons appear at the bottom of the screen.


The screenshot displays a comprehensive patient dashboard. Key sections include:

- Patient Contact Information:** Child Test, 123 Happy Street @1, Port Barre, LA 70577 USA.
- Other Patient Information:** Chart #: 14519, Patient Payment: \$15.00, Billing Code: G, Last Visit Date: 07/29/2025, Last Diagnoses: A:R50.9.
- Demographics:** Date Of Birth: 03/17/2017, Patient Age: 8 years, Admin Sex: Female, Marital Status: Single, Student Status: None, Emerg. Contact: Employer: none.
- Guarantor Ledger:** Shows a current balance of \$-15.00 for the patient and \$15.00 for the guarantor, with a total of \$260.00.
- Insurance Policies:** A table listing policies such as Blue Cross Capital (889/BLBS) with a policy number of 123.
- Navigation:** Buttons for 'Guarantor Statement' and 'Patient Statement' are highlighted at the bottom.

The **Guarantor Statement** button will generate a statement addressed to the Guarantor on the claim. This statement will list any claims for patients, including the Guarantor linked to the Guarantor on the claim.

<div style="border: 2px solid red; padding: 5px; display: inline-block;"> Guarantor Test 123 Happy Street @1 Port Barre, LA 70577 USA </div>						
Date	Description	Charge	Payment/ Adjustment	Pending Insurance	Patient Responsible	
Claim: 32697 Account: 14518 Guarantor Test - Filed to 14518 Guarantor Test Provider: Les Grossman						
07/15/2025	99204 Office Or Other Outpatient Visit For The Evaluation And Management Of A New P	220.00				
07/15/2025	81000 Urinalysis, By Dip Stick Or Tablet Reagent For Bilirubin, Glucose, Hemoglobin, Ke	50.00				
07/29/2025	Commercial Insurance Service Code C from Aetna		100.00			
07/29/2025	EFT Aetna from Aetna		150.00			
08/06/2025	Insurance Write Off from Administrative Procedures		1.00			
08/06/2025	Insurance Master Card from Administrative Procedures		2.00			
Claim Balance:				0.00		17.00
Claim: 32699 Account: 14519 Child Test - Filed to 14518 Guarantor Test Provider: Les Grossman						
06/29/2025	99203 Office Or Other Outpatient Visit For The Evaluation And Management Of A New P	160.00				
07/31/2025	Cash - 07/31/2025		20.00			
07/31/2025	Commercial Insurance Service Code C from Blue Cross Capital		50.00			
07/31/2025	Insurance Master Card from Blue Cross Capital		50.00			
Claim Balance:				0.00		40.00
Claim: 32698 Account: 14519 Child Test - Filed to 14518 Guarantor Test Provider: Les Grossman						
07/29/2025	99214 Office Or Other Outpatient Visit For The Evaluation And Management Of An Estab	220.00				
07/29/2025	81003 Urinalysis, By Dip Stick Or Tablet Reagent For Bilirubin, Glucose, Hemoglobin, Ke	15.00				
Claim Balance:				0.00		235.00

The **Patient Statement** button will generate a patient statement with only the patient's claims. The Statement is still addressed to the Guarantor due to the selection made in the Statement Setup.

Tutorial Clinic 68 Collins Ave P.O. N8341 Nassau, NP					
		Card Number:		Signature:	
		Exp Date:		Amount:	
		Balance Due Now:	Account:	Date:	
		275.00	14518	03/04/2026	
Please pay the patient due amount only. Thank You					
Guarantor Test 123 Happy Street @1 Port Barre, LA 70577 USA					
Date	Description	Charge	Payment/Adjustment	Pending Insurance	Patient Responsible
	Claim: 32699 Account: 14519 Child Test - Filed to 14518 Guarantor Test Provider: Les Grossman				
06/29/2025	99203 Office Or Other Outpatient Visit For The Evaluation And Management Of A New P	160.00			
07/31/2025	Cash - 07/31/2025		20.00		
07/31/2025	Commercial Insurance Service Code C from Blue Cross Capital		50.00		
07/31/2025	Insurance Master Card from Blue Cross Capital		50.00		
	Claim Balance:			0.00	40.00
	Claim: 32698 Account: 14519 Child Test - Filed to 14518 Guarantor Test Provider: Les Grossman				
07/29/2025	99214 Office Or Other Outpatient Visit For The Evaluation And Management Of An Estat	220.00			
07/29/2025	81003 Urinalysis, By Dip Stick Or Tablet Reagent For Bilirubin, Glucose, Hemoglobin, Ke	15.00			
	Claim Balance:			0.00	235.00

Patient Ledger - The Patient Ledger has only one [Statement] button at the bottom. When the Statement button is selected, the Statement will be generated addressed to the Guarantor (subject to the option selected in the Statement Setup). It will only generate claims for the Patient.

Patient Reports Appointments Claims Support Messages (91/91) Logout Home

Tutorial Clinic - Tutorial **Patient Ledger** User: T Tutor

Test, Child Account: #14519 Chart #: 14519 Wednesday Mar 4 2026, 6:08 pm

Total Account Summary				Individual Claim Filing History				Individual Claim Details			
Age	Patient	Account	Balance Details	Date Filed	Payer	Method	Seq	Claim Aging	Balance Details		
Current:	\$-15.00	\$-15.00	Patient: \$260.00					Current:	\$0.00	Patient: \$0.00	
31-60:	\$0.00	\$0.00	Insurance: \$0.00					31-60:	\$0.00	Insurance: \$0.00	
61-90:	\$0.00	\$0.00	Medicare: \$0.00					61-90:	\$0.00	Medicaid: \$0.00	
91-120:	\$0.00	\$0.00	Medicaid: \$0.00					91-120:	\$0.00	Medicaid: \$0.00	
121+:	\$275.00	\$275.00	Total: \$260.00					121+:	\$0.00	Total: \$	
Total:	\$260.00	\$260.00									

Legend Detail View Summary View Filter Claims

Claim Summary List Last Patient Payment: \$15.00 On: 02/24/2026

Claim	Seq	Service Date	MSG	Provider	Location	Filing Status	Payer	Last Patient Pay	Charges	Balance
+ 32755	Pri	None	★	Big Boss	Location 2.0	Filed (Patient Filed)	Unapplied	02/24/2026	\$0.00	\$-15.00
+ 32699	Sec	06/29/2025		Big Boss	Location 2.0	Filed (Patient Pendi...	Patient (gua: 14518)	07/31/2025	\$160.00	\$40.00
+ 32698	Pri	07/29/2025		Big Boss	Location 2.0	Filed (Patient Pendi...	Patient (gua: 14518)	Never	\$235.00	\$235.00

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Payment Adjust Transfer Information Messages Add Service Referral Letter Print Claim Credit Transfer

Statement Print Ledger Unapplied Payment Add Unapplied Payment Apply Pay Account Statement History + Enter Charges + UB04 Charges

+ ADA Charges All Claims Quit

Updates to Printing Statements From the Collection Manager/Advanced Statements Tab

To access the Collection Manager, go to Reports tab>Collection Manager>Advanced Statements tab.

Patient Reports Appointments Claims Support Messages (91/91) Logout Home

Tutorial Clinic - Tutorial **Collection Manager** User: T Tutor

Test, Child Account: #14519 Chart #: 14519 Thursday Mar 5 2026, 11:14 am

Patient Statements **Advanced Statements** Occupational Medicine Statements Statement Batches Move To Collections Move From Collections Collection Batches Write Off

Write Off Batches

Statement Setup: Tutorial Clinic Statements

Statement Mode: One Statement per Guarantor

Provider: All Providers

Provider Group:

Location: All Locations

Location Group: Any

Date Range: mm/dd/yyyy to mm/dd/yyyy

Days Since Last Statement To Exclude: 30

Days Since Last Payment To Exclude:

Account Balance Min: 5.00 Max:

Use Patient Payment Aging: Yes No

Include Unapplied Pre-Payments: Yes No

Include Claims with Negative Balance: Yes No

Include Claims with Zero Balance: Yes No

Patient Contact Options: Include any (no restrictions)

Last Name Range From: To:

Bill Code: Receive Statements (G, C, etc)

Claim #:

Patient Account #:

Guarantor Account #:

Payer Type: Patient

Payer Group: All

Payer: Select Payer

- The **Statement Mode** drop down list that previously appeared to the right of the Patient Account # field has been moved to below the Statement Setup option. The Statement Mode option can now override a setup's default Statement Mode even when a patient account # is not entered. The selected setup's default Statement Mode will be selected by default.
- A new option to filter by **Guarantor Account #** was added below the Patient Account # option.

The screenshot displays the 'Collection Manager' interface for 'Tutorial Clinic - Tutorial'. The main navigation bar includes 'Patient', 'Reports', 'Appointments', 'Claims', 'Support', 'Messages (91/91)', 'Logout', and 'Home'. The user is identified as 'User: T Tutor'. The current patient is 'Test, Child' with account #14519 and chart #14519, dated Thursday Mar 5 2026, 11:14 am.

The 'Advanced Statements' tab is active, showing the 'Statement Setup' configuration for 'Tutorial Clinic Statements'. The 'Statement Mode' is set to 'One Statement per Guarantor'. Other settings include 'Provider: All Providers', 'Location: All Locations', 'Date Range' (mm/dd/yyyy to mm/dd/yyyy), 'Days Since Last Statement To Exclude: 30', 'Days Since Last Payment To Exclude', 'Account Balance Min: 5.00', and 'Max:'. There are radio buttons for 'Use Patient Payment Aging', 'Include Unapplied Pre-Payments', 'Include Claims with Negative Balance', and 'Include Claims with Zero Balance'. The 'Patient Contact Options' are set to 'Include any (no restrictions)'. The 'Last Name Range From' and 'To' fields are empty. The 'Bill Code' is 'Receive Statements (G, C, etc)'. The 'Patient Account #' and 'Guarantor Account #' fields are highlighted with red boxes. The 'Payer Type' is 'Patient' and the 'Payer Group' is 'All'. A 'Select Payer' button is at the bottom.

Reports

- Update to the **Daily Posting Report** (Reports tab > Daily > Daily Posting):
 - Payment transfers have been moved from the payment source columns (Cash, Check, Credit Card and Other) to two new columns on the report:
 - Transfers From Unapplied - Only transfers that are attached to Unapplied Claims (Take it Out of Unapplied)
 - Transferred to Claim - Only transfers that are attached to non-Unapplied Claims (Put it into a Claim)
 - To see the added columns, select “Yes” at the bottom of the criteria page.

Tutorial Clinic		Daily Posting Report (Details)							
Run Date: 03/05/2026	Run Time: 15:44:21	Posting Dates from 03/04/2026 to 03/05/2026 - User: All					User: T Tutor		
Payer: All - Payer Group: All - Payer Type: All									
Provider: All - Provider Group: All									
Location: All - Location Group: All									
Posting Date	Payer	Check Number	Checks	Cash	Credit Card	Other	Transfers From Unapplied	Transferred To Claim	Totals
Totals:			0.00	0.00	0.00	0.00	0.00	0.00	0.00

Issue Resolutions

- **Patient Search - Patient Add/Edit - Referring Provider Lookup**

- Issue: Referring Provider Add dialog opened behind the Referring Provider Search dialog.
- Resolution: Resolved issue that was causing the Referring Provider add dialog to open behind the Referring Provider search dialog.

- **Patient Add/Edit - Duplicate Checker**

- Issue: Duplicate checker being displayed when editing an existing patient.
- Resolution: Display duplicate checker only when adding a new patient.

- **Patient Search - Quick Add**

- Issue: When searching for a patient by name and the patient does not exist, the name entered did not retain.
- Resolution: Added the ability to populate the name field in the quick add dialog with the name that was entered in the search field.

- **Patient Search - Did not retain value of previous search.**

- Issue: The recent updates to the Patient Search screen failed to include remembering the search input criteria when navigating back to the search screen from the Patient Dashboard. Only the search mode, Show Guarantor and Show deleted criteria was being remembered.
- Resolution: Added the ability to remember the value that was searched for.

- Please contact your Customer Care Team with any questions that you may have regarding the above updates.