

5.13 Release Features

Big things are coming to help us end the year with some exciting big features. In the meantime, Release 5.13 has a little something for everyone.

Key Features

Classify, Organize, Thrive

- **For Documents At Least.** Create your own customized document types for your document types for easier and more customized organization.

Charges, Not Just for Devices

- **No Plug Required.** Identify and calculate **transaction charges** for the CareCredit payment category and follow the impact in the payment and in the Ledger.

The Clock is Ticking on Benefits

- **Can You Squeeze Me In?** Identify patients that still have insurance benefits remaining for a final push to bring them in before the end of the year. Build either a list or launch a promotional engagement campaign.

More Improvements

Front Office:

- Quickly peek at your providers' scheduled and actual production for a location directly from the **Huddle Dashboard**.
- Navigate easily with consistent naming of the **Scheduler** in menus, links, and icons.
- Jump directly to the date of an appointment linked in the **Actions Needed** section of the Patient Overview.

Billing and Insurance:

- Choose to have payments that come from outside sources like text-to-pay and portal payments assigned to patient first, and any remaining to be allocated to other members.
 - Process payments for child patients at the responsible party level with a new section within the responsible party's record.
 - Track **Text-to-Pay** receipts more easily now that the payments are always linked to the recipient of the text.
 - Get more accurate information from the Payment Reconciliation **Insights** report that accounts for transaction charges.
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