

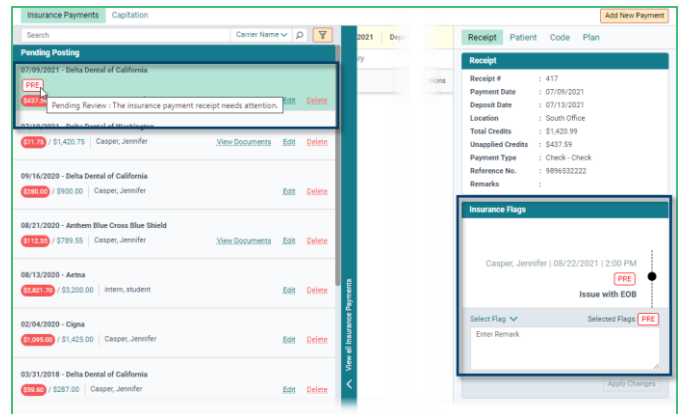
# 5.21 Release Features

In this release, we worked on different Revenue Cycle Management tools, improving the authorization tools, payments, adjustment defaults, and reporting. As we continue to look to the future, you may try some Early Access features. If you do, be sure to give us feedback.

## Key Features

### Wave the Flag

**Red, Yellow, and Green** Identify insurance payments that need special attention with a list of standard and customizable flags. Like Claim Flags, these Payment Flags create a timeline of activities and notes for the payment, no matter what the carrier throws at you.



### Get the Authorization

**All The Authorization Things** Create, edit, and void authorizations for either or both primary and secondary insurance and print or submit them all at once.

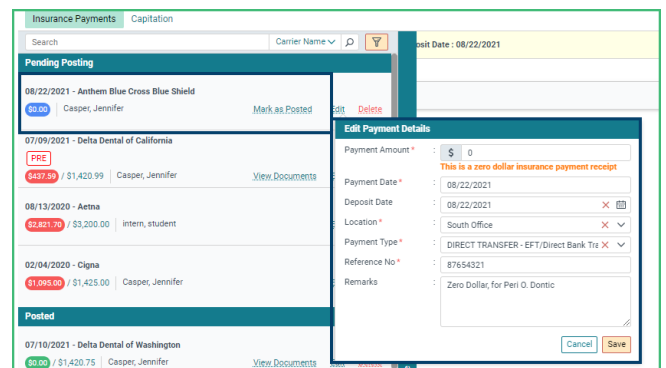
Select	Pre-Auth. ID	Pre-Auth. No	Patient	Tx. Provider	Mode	Insurance Type	Submitted Date	Status
<input checked="" type="checkbox"/>	36	--	Rhodes, Dusty (1317)	PEPPR	Paper Based	Dental		Draft
<input type="checkbox"/>	35	--	Beastly, Belle (1099)	PEPPR	Paper Based	Dental		Draft
<input type="checkbox"/>	34	98765432111	Lemon, Lyme (1196)	PEPPR	Paper Based	Dental	02/27/2020	Pending
<input type="checkbox"/>	29	928291202	Stackwell, Josef (1152)	MCARS	Paper Based	Dental	01/17/2020	Pending
<input type="checkbox"/>	28	12345677777	Huginz, Amanda (1018)	MOLR	Paper Based	Dental	05/10/2021	Void
<input type="checkbox"/>	26	AU10135249	Sudden, Oliver (1217)	MCARS	Paper Based	Dental	10/11/2019	Resubmit
<input type="checkbox"/>	24	AU10130424	Patientz, Seymore (1030)	MCARS	Paper Based	Dental	10/10/2019	Completed

### Zero Dollar Payment, Zero Problem.

#### Payments for Zero Dollars are a Thing

Create those zero-dollar insurance payments for easier tracking of payments - or rather non-payments.

**Video Reference:** <https://vimeo.com/591301786>



## More Improvements

---

### Revenue Cycle Management:

- ≡ Configure your **insurance adjustment defaults** for specific situations with expanded options in an easy to interpret grid. Your current defaults will remain in the new version.
- ≡ Link a claim to an **ERA** and post payments accordingly. The link remains even after the screen is closed unless delinked.
- ≡ Process **BluePay** payments more simply with transactions processed as a single “Sale” transaction instead of two separate Authorization and Capture transactions.


### Clinical:

- ≡ Clarify communications with providers you refer out to by addressing the referral letter separately from providing the referral.
- ≡ Change the email address of your existing referral providers.

### Patient Portal:

- ≡ Customize the look, verbiage, and timing of your patient portal welcome email with new **Specialized Patient Engagement Campaigns**.
- ≡ Allow your patients to enter details about their own insurance plans directly from the Patient Portal. Details come to CareStack in DRAFT form, ready for you to review and verify. Customize the details you want to collect or disable the option entirely.

### Reporting and Analytics

- ≡ Expand your **Analytics Dashboard** with new KPI widget options for Case Acceptance, Checked-out Production, Broken Appointments, Rescheduled Rate, and more.
  - ≡ Arrange the KPIs in your **Scorecards** in your preferred arrangement.
  - ≡ Show how advance payments are applied in the **Income Allocation** and **Income Allocation Extended** reports with a new code filter.
  - ≡ Work with the **Insurance Pending Procedures** report more easily now that checked-out orthodontic codes won't clog it up.
- 

## Early Access

---

### Charting

- ≡ New options for adding elements to the chart.
  - Locate your desired element quickly with the consolidated **+Code** button that allows the addition of procedure codes, explosion codes and conditions.
  - View all the collected elements at once and change the billing provider or other details within the summary slide-out.
  - Add Care Notes directly to the chart in draft status without interrupting your workflow using **Burst** mode or retain the current pop-up options in normal mode.
- ≡ Learn more: <https://vimeo.com/569211177>

### Advanced Planner

- ≡ Group and present treatments with the Advanced Planner's new case presentation features.
  - Tie a Treatment Plan to a specific Treatment Coordinator and track presentation and acceptance statistics.
  - Present a Treatment Plan to the patient as a treatment consultant and mark it as presented, giving it a special icon and color coding.
  - Show the history of the plan's creation, presentation, and status changes.
  - Add notes and communicate with your team about the plan with special treatment plan notes.
  - Present the plan electronically or on paper, with or without fees. In the electronic version, dynamically rearrange or accept treatments.
  - Send the treatment plan to the patient portal
- ≡ Learn more: <https://vimeo.com/569624761>

### CareNotes

- ≡ Write detailed notes about your treatment and interaction with the patient.
  - New view shows all the note's prompts in a list instead of individually.
  - Merge multiple notes into one for a cleaner, clearer record.
  - Track the status of notes with clearer delineation for those that need to be started, completed, or approved.
- ≡ Learn more: <https://vimeo.com/586099045>