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## Patch Release

Version: 4.0 Build: 1

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Total Points: 5

Enhancements: 5 (Generic: 5, Internal: 0, Custom: 0)

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### Enhancement 1: Exclusion of Specific Employers and TPAs from the Scheduled Invoice Creation Process

Module:	PM
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Type:	<b>GENERIC</b>
Case ID:	<b>524751</b>
Affected Screen(s):	<b>Scheduled Process</b> <b>Navigation</b> Settings → Scheduled Process → <b>Create Employer Invoice</b>
Description:	<p>An enhancement has been introduced to allow clinics to exclude specific Employers or TPAs from the invoice generation process without impacting other records.</p> <p>Two new multi-select parameters have been added: <b>Exclude Specific Employers</b> and <b>Exclude Specific TPAs</b>. Users can select up to 25 records from a lookup list of active Employers or TPAs. If the selection exceeds 25, the existing validation message “<b>Maximum records Selected.</b>” gets displayed.</p> <p>By default, the field remains blank (indicating all eligible records will be processed). A search icon allows selection from active records only, and no free-text entry is permitted. Employers or TPAs already selected in the <b>Selected Employers / TPAs</b> parameter will not appear in the exclude list. A <b>Clear</b> option is provided to remove all exclusions and revert to default behavior.</p> <p>During scheduled execution, if no records are selected in the <b>Exclude</b> field, all eligible Employers or TPAs will be processed. If records are selected, those specific Employers or TPAs will be excluded while the remaining records will be processed as per existing logic.</p>

## Enhancement 2: Employer Services CPT/HCPCS Fees to be Displayed in the Superbill

Module:	<b>PM</b>
Type:	<b>GENERIC</b>
Case ID:	<b>523627</b>

Affected Screen(s):	<b>Copay</b> <b>Navigation</b> Remittance → Patient Payment → <i>Copay</i>
Description:	This enhancement updates the Superbill workflow to ensure accurate fee retrieval for encounters associated with <b>Employer Services</b> claim types. Previously, the Superbill fetched CPT/HCPCS fees only from the default fee schedule configured in the system property <b>fee.schedule.id.for.superbill</b> , resulting in missing or incorrect fees for employer-related encounters. With this enhancement, during Superbill generation, the system validates the Encounter Type and associated Claim Type. If the Claim Type is <b>Employer Services</b> , the system identifies the linked Employer, retrieves the Employer-specific Fee Schedule, and fetches the corresponding CPT/HCPCS fees. If a fee exists in the Employer Fee Schedule, it is displayed; if not, \$0.00 is shown. In cases where the Employer does not have an assigned Fee Schedule or the billed CPT/HCPCS code is not present in the Employer Fee Schedule, the system falls back to the default fee schedule defined in <b>fee.schedule.id.for.superbill</b> . For non-Employer Services claim types, the existing logic continues to use the default system property fee schedule.

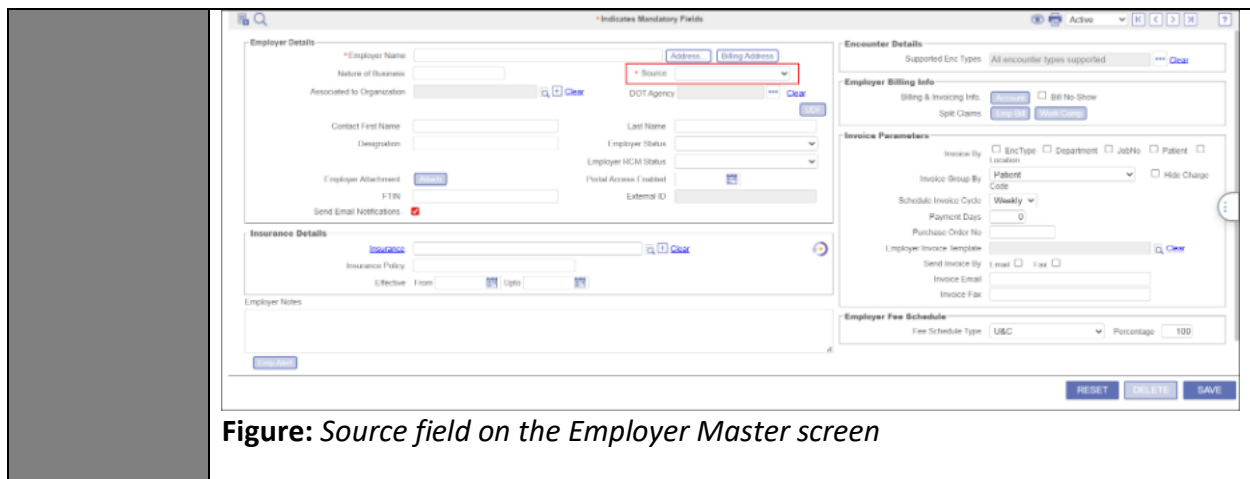
### Enhancement 3: Increase Selectable Claims Limit and Enable Cross-Page Selection on Approved Claim Screen

Module:	<b>PM</b>
Type:	<b>GENERIC</b>
Case ID:	<b>522685</b>
Affected Screen(s):	<b>Approved Claim</b> <b>Navigation</b> Claims → <i>Approve Claim</i>

<b>Description:</b>	<p>This enhancement increases the maximum number of selectable claims on the <b>Approved Claim</b> screen from 25 to 100 to support bulk billing and operational workflows. The screen will continue to display 50 claims per page with no changes to pagination. When a user clicks <b>Select All</b>, all 50 claims on the current page will be selected, and selections will persist across page navigation until explicitly deselected or the screen is refreshed.</p> <p>The system will allow selection of up to 100 claims at a time and will block further selections once the limit is reached, displaying the validation message: <b>"A maximum of 100 claims are selected."</b></p> <p>The existing 25-claim selection limit will be removed. Additionally, the <b>Claim Count</b> field at the bottom of the screen will be enhanced to dynamically display both the Selected Claim Count and Total Claim Count in the format <b>Selected Claims   Total Claims</b>.</p>
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#### Enhancement 4: A New Source Field is Introduced on the Employer Master Screen

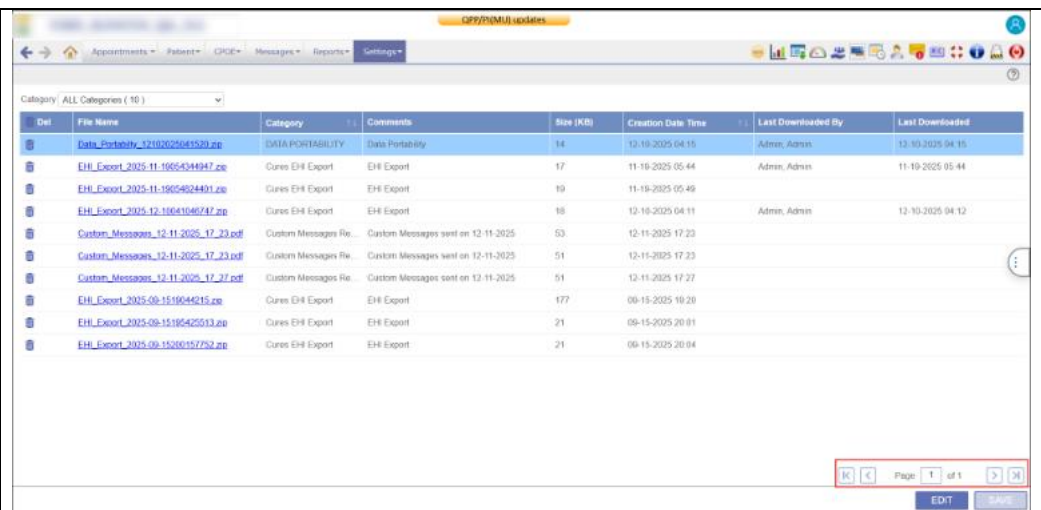
<b>Module:</b>	<b>EMR+PM</b>
<b>Type:</b>	<b>GENERIC</b>
<b>Case ID:</b>	<b>527835</b>
<b>Affected Screen(s):</b>	<b>Send Text popup</b> <b>Navigation</b> Settings → Configuration → Vendors column → <b>Employer</b>
<b>Description:</b>	<p>In this enhancement, a new <b>Source</b> field has been introduced on the <b>Employer</b> Master screen to capture employer referral information. The field is configurable through Group Types, supports property-driven mandatory enforcement, includes field-level history tracking, and provides new tags for reporting, forms, and templates. Additionally, existing Employer Source data previously maintained via UDFs has been migrated at the backend to ensure continuity.</p>



**Figure:** Source field on the Employer Master screen

## Enhancement 5: Download Files Screen Performance Improvement and Pagination controls

Module:	EMR+PM
Type:	GENERIC
Case ID:	533418
Affected Screen(s):	<p><b>Download Files</b></p> <p><b>Navigation</b> EMR → Settings → Configuration → Clinic column → <b>Download Files</b></p> <p><b>Navigation</b> Billing → Settings → <b>Download Files</b></p>
Description:	The <b>Download Files</b> screen has been enhanced with pagination to improve performance and usability when handling large datasets.

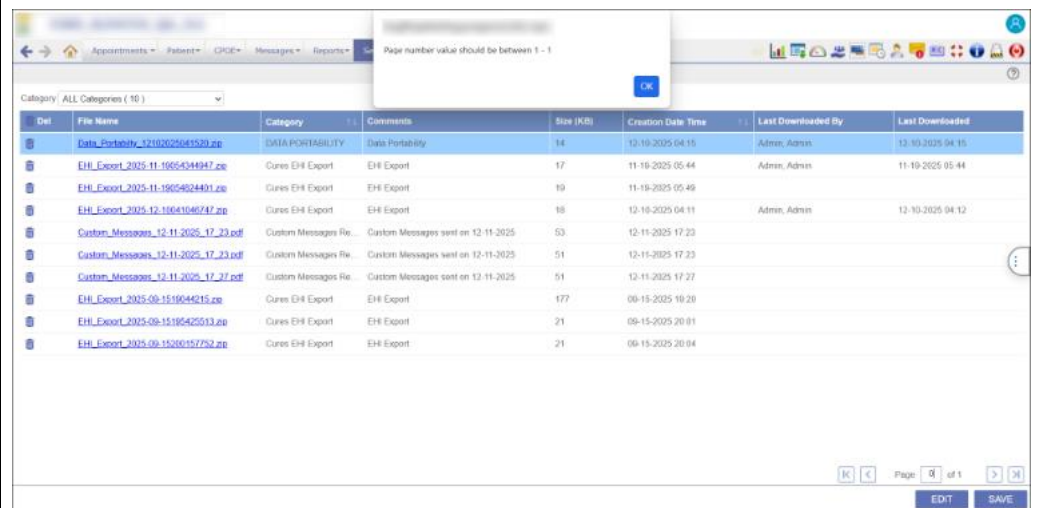


Del	File Name	Category	Comments	Size (KB)	Creation Date Time	Last Downloaded By	Last Downloaded
	Data_Portability_12-10-2025-041520.zip	DATA PORTABILITY	Data Portability	14	12-10-2025 04:15	Admin, Admin	12-10-2025 04:15
	EHI_Export_2025-11-19-05434947.zip	Cures EHI Export	EHI Export	17	11-19-2025 05:44	Admin, Admin	11-19-2025 05:44
	EHI_Export_2025-11-19-054924401.zip	Cures EHI Export	EHI Export	19	11-19-2025 05:49		
	EHI_Export_2025-12-10-041046747.zip	Cures EHI Export	EHI Export	18	12-10-2025 04:11	Admin, Admin	12-10-2025 04:12
	Custom_Messages_12-11-2025_17_23.pdf	Custom Messages Re.	Custom Messages sent on 12-11-2025	53	12-11-2025 17:23		
	Custom_Messages_12-11-2025_17_23.pdf	Custom Messages Re.	Custom Messages sent on 12-11-2025	51	12-11-2025 17:23		
	Custom_Messages_12-11-2025_17_27.pdf	Custom Messages Re.	Custom Messages sent on 12-11-2025	51	12-11-2025 17:27		
	EHI_Export_2025-09-15-19-04215.zip	Cures EHI Export	EHI Export	177	09-15-2025 19:20		
	EHI_Export_2025-09-15-19-042013.zip	Cures EHI Export	EHI Export	21	09-15-2025 20:01		
	EHI_Export_2025-09-15-20-0157292.zip	Cures EHI Export	EHI Export	21	09-15-2025 20:04		

**Figure: Download Files screen**

The screen now displays 25 records per page instead of loading all records at once. This significantly reduces load time and improves overall responsiveness.

Navigation controls are available to move to the **First**, **Previous**, **Next**, and **Last** pages. Users can also directly enter a page number to quickly access specific records. Page validation ensures navigation remains within valid limits.



Page number value should be between 1 - 1

Del	File Name	Category	Comments	Size (KB)	Creation Date Time	Last Downloaded By	Last Downloaded
	Data_Portability_12-10-2025-041520.zip	DATA PORTABILITY	Data Portability	14	12-10-2025 04:15	Admin, Admin	12-10-2025 04:15
	EHI_Export_2025-11-19-05434947.zip	Cures EHI Export	EHI Export	17	11-19-2025 05:44	Admin, Admin	11-19-2025 05:44
	EHI_Export_2025-11-19-054924401.zip	Cures EHI Export	EHI Export	19	11-19-2025 05:49		
	EHI_Export_2025-12-10-041046747.zip	Cures EHI Export	EHI Export	18	12-10-2025 04:11	Admin, Admin	12-10-2025 04:12
	Custom_Messages_12-11-2025_17_23.pdf	Custom Messages Re.	Custom Messages sent on 12-11-2025	53	12-11-2025 17:23		
	Custom_Messages_12-11-2025_17_23.pdf	Custom Messages Re.	Custom Messages sent on 12-11-2025	51	12-11-2025 17:23		
	Custom_Messages_12-11-2025_17_27.pdf	Custom Messages Re.	Custom Messages sent on 12-11-2025	51	12-11-2025 17:27		
	EHI_Export_2025-09-15-19-04215.zip	Cures EHI Export	EHI Export	177	09-15-2025 19:20		
	EHI_Export_2025-09-15-19-042013.zip	Cures EHI Export	EHI Export	21	09-15-2025 20:01		
	EHI_Export_2025-09-15-20-0157292.zip	Cures EHI Export	EHI Export	21	09-15-2025 20:04		

**Figure: Validation message when page number added to the field is outside the valid range**

Pagination controls have been introduced on the screen. The UI has been updated accordingly while maintaining consistency with other Prognosis listing screens.



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	This enhancement improves response time, supports better scalability, and provides a faster and more flexible user experience.
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