TIERED ROLLOUT IN THREE RELEASE PERIODS

OCT 7, 16 & 23

2025 FALL RELEASE FEATURES

PRACTICE MANAGEMENT

AdvancedMD Pay Refund Enhancements
Through AdvancedMD Pay you can now easily refund credit card payments to the cardholder, even when the payment has been split multiple times across visits and payments, and even after they've been archived. Our new refund button replaces the old void process for greater convenience, and you can easily track whether your refund was issued via cash, check, or credit card. This helps save staff time and eliminates patient frustrations.

Patient and Responsible Party Enhancements
Our latest update to the demographics dashboard introduces a new column for improved organization of patient information, making data easier to scan and find. Also, your patient cards will automatically save in your preferred order. No more wasted time reorganizing or searching for information. With these enhancements, you'll enjoy a smoother, more intuitive workflow.

Patient Contact Card
Our new Patient Contact Card is a streamlined solution for accessing and managing patient communication details such as emergency contacts and next of kin. With this enhancement, clinicians can now view and edit contact information directly from the patient demographic dashboard, reducing time spent navigating multiple screens. By streamlining emergency contact management, our system speeds care delivery, enhances patient safety, ensures privacy compliance, and increases trust and operational efficiency for long-term success.

Enhanced Analytics
We're excited to announce a powerful upgrade to Analytics that transforms how you interact with your data. Enhancements include new options for creating reports and dashboards, and basic mathematical analysis and insights into data. This upgrade boosts productivity and empowers faster, data-driven decisions with a more intuitive experience.

Patient Appointment Mini Card
Introducing the new Patient Appointment Mini Card—your streamlined solution for delivering appointment details immediately. This feature empowers front office staff with quick access to essential patient and scheduling information in real-time, reducing clicks and improving workflow efficiency.

Single Sign-on
With the new Single Sign-on (SSO) feature, you can use the same login credentials to access AdvancedMD and the mobile app that you use for other SSO-enabled applications. AdvancedMD now integrates with SAML-based Single Sign-on Identity Providers (IdP), like Microsoft® Entra ID, so you have fewer credentials to manage. This can also provide your practice with more streamlined control over user accounts.

Waystar Eligibility Integration Parity
Waystar eligibility integration now offers full parity with existing clearinghouse workflows, streamlining transitions and reducing manual intervention. Clients can confidently manage eligibility transactions with consistent payer ID mapping, ensuring accuracy and operational continuity. This enhancement empowers practices to maintain efficiency and flexibility while navigating clearinghouse changes.

Waystar Single Sign-on
We have integrated access to the Waystar clearinghouse website, so you can access the site directly from PM without needing separate login credentials. This secure, automated connection routes users to the correct screen based on their role and permissions, streamlining workflows and saving time. The result is a faster, more efficient experience that enhances both productivity and security.

Waystar Enrollments Accelerator
The new Enrollments Accelerator is a powerful tool you can use to send recent test claims to Waystar, who will then create your payer agreements. This feature eliminates manual steps and ensures faster, more accurate enrollment processing.

Link Unapplied Payments to Visit
Now, when you un-apply an insurance payment, the visit number and EOB link will remain linked to the payment. This reduces errors and preserves essential data relationships for accurate financial tracking and efficient claim management.

Provider: Supervising & Carrier Category to IDs Screen
You can now add billing exceptions by Carrier Category in the Provider Billing IDs system setting. This enhancement improves billing setup, as you can now use existing carrier categories to efficiently apply exceptions in bulk.

Multiple Co-pays per Appointment Type
You can now assign multiple co-pay amounts to a single appointment type, giving you the flexibility to tailor billing based on patient categories like Medicare, Medicaid, or telehealth. This enhancement increases charge accuracy and reduces manual overrides, ensuring smoother workflows and fewer billing errors.

Report Center Updates
We have enhanced the Demographics Listing report to remain compliant with federal standards by adding patients' preferred phone and language. This upgrade ensures your organization stays ahead in delivering compliant, patient-centered care.

Facility NPI per Carrier
You can now assign unique Facility NPIs by carrier or carrier category, streamlining claim submissions for specialties that require carrier-specific identifiers. This enhancement eliminates the need for manual toggling and delayed billing, reducing administrative burden and improving claim accuracy. The result is faster, more accurate submissions and greater flexibility for your practice.

Provider System Settings Enhancements
We've made enhancements to the Provider system setting with a more intuitive layout that reduce clicks and improves workflow. With improvements such as a "quick add" feature to enter only the minimum required fields, and easier access to the filter feature, these updates make onboarding providers is ow faster and more efficient.

Enhanced Cancel & No-show Automation
You can now exclude Saturday and Sunday from the hours set in the Calculation Fee Window setting. This enhancement provides flexibility to include or skip weekends when applying a fee for canceled or no-show appointments within the set fee window.

New Standard Report: Claim Inspector Errors Found Detail Report
We're excited to introduce the new Claim Inspector Errors Found Detail Report, designed to optimize your claims management workflow. Users can quickly identify and resolve claim errors, reducing manual review and accelerating processing times. With enhanced visibility into error details, billers can take targeted action to improve accuracy and efficiency.

Claims Center Provider Filters
The Claims Center now includes a Provider Filter in both the Claim Inspector and Exclusions tabs, making it easier to isolate and manage claims by provider. This intuitive enhancement mirrors the familiar Charge Review experience and ensures filters persist across batches for consistent workflows. You will see faster navigation, clearer insights, and improved efficiency in claims handling.

Diagnosis Code Lookup Upgrade
We're excited to introduce a smarter, faster way to reorder diagnosis codes in charge entry. With an upgraded search experience, this new reorder functionality reduces errors, saving valuable time and effort.

Electronic Health Records

ePrescribing Pro Package
Our ePrescribing feature just keeps getting better. New enhancements include compound prescribing, drug and image imprint, duplicate therapy notifications, weight-based calculator, and Google maps for pharmacy. Available in both our EHR and mobile platforms, these updates empower healthcare professionals to prescribe with greater accuracy, safety, and convenience, improving workflow and supporting better patient outcomes.

AI-powered Pre-visit Summary
You can now generate pre-visit summaries using AI technology that give providers a clear, concise view of a patient's recent medical history—before the appointment even begins. By pulling together notes, labs, medications, allergies, and risk factors, this feature helps clinicians better focus on delivering informed, personalized care.

EHR Launch for FHIR Smart Apps
You can now launch smart apps from a patient chart. This integration empowers healthcare providers to seamlessly connect applications to their clinical workflow, enhancing data accessibility and decision-making. The result is a smarter, more agile EHR experience that supports better patient outcomes and operational efficiency.

EPCS Multi-authentication Support
You can now improve your EPCS workflow with enhanced multi-authentication support, saving valuable time when signing multiple prescriptions. This new capability integrates seamlessly with DrFirst, boosting compliance for controlled substance prescribing. By simplifying authentication and minimizing duplicate steps, providers can focus more on patient care and less on administrative overhead.

CCDA – Additional Data Elements
The third phase of our three-phase rollout to update to USCDIv3 standards is here, and you can now collect and exchange all USCDIv3 data elements. Your practice can send referrals, progress notes and general information about a patient to another provider or organization using Direct Messaging technology. These updates align with the HTI-ASTP/ONC regulations and the US Core Data for Interoperability or USCDI version 3 set of clinical data elements for health information exchange.

Mental Health Notes, Tools & Assessments
You can now access new mental health and behavioral health assessments, score cards, tools, and questionnaires in the Template Library. This comprehensive suite of content is designed to support behavioral health providers in capturing patient data more effectively, improving care coordination, and meeting compliance standards.

ELECTRONIC HEALTH RECORDS BETA

AI-generated Transcript & Summaries
You can now generate transcription content and summaries directly within EHR notes using AI. This enhancement simplifies clinical documentation, saves providers valuable time, and improves note consistency and completeness.

PATIENT ENGAGEMENT

AI Upload of Patient Insurance Card
Introducing another exciting new AI feature designed to save you time and improve patient care. When you or a patient upload an image of an insurance card, our system will automatically read and populate the information for quick review and seamless integration into the patient chart. This enhancement, available through the patient portal, telehealth intake, and online scheduling forms, ensures a streamlined workflow.

Provider Patient Load & Availability
We're introducing a powerful enhancement to the Scheduler that gives practices real-time visibility into provider availability and patient load percentages. With customizable settings for both schedule and patient load, practices can tailor the experience to match their unique workflows. This feature empowers administrators to optimize scheduling by balancing workloads.

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