TIERED ROLLOUT IN THREE RELEASE PERIODS

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WINTER 2025

MORE CARDS. HEALTHIER POPULATION. AUTO SAVE.

Patient & Responsible Party Cards

Billing IDs in Provider Setup

Clinical Notes AutoSave

Population Health

Patient Pre-call Telehealth Waiting Room

Office Key Level Messaging Identifier

PRACTICE MANAGEMENT

Patient & Responsible Party Cards
The patient demographics and responsible party pages have been redesigned with our new card framework. This layout offers a more intuitive and comprehensive user experience. The main Patient and Responsible Party Cards, along with their respective mini cards, let you quickly view high-level patient information or dive into detailed records as needed. This framework also allows for the addition of new key demographic fields in the future, such as patient pronouns. Additionally, we've improved Scheduler Quick Add with a new feature that allows you to add patients and responsible parties more efficiently, creating a smoother and more connected user experience.

Billing IDs in Provider Setup
We've enhanced the management of provider billing IDs by offering improved flexibility and control. Now you can assign begin and end dates to billing ID exceptions, ensuring accurate claim submissions while saving time. This feature allows you to manage past, present, and future exceptions by carrier or facility, reducing manual tracking and billing errors.

Centralize Provider System Settings
We've streamlined the Professional Provider System Settings screen by grouping related settings in a single, centralized location. This change saves time, reduces complexity, and simplifies workflows for efficient management of provider settings.

Add Multiple Providers in a Single Purchase Request
Our new Application Services module lets you request, approve, and add multiple providers in one batch. Bundle your provider list into a single request, receive one quote, and eliminate unnecessary manual steps—creating a faster, smoother, and more efficient workflow entirely within AdvancedMD.

AdvancedMD Pay Notifications for CC Alerts
Stay informed with in-app notifications for important credit card alerts. These notifications support proactive management of your credit card account by ensuring timely handling of chargebacks and helping you maintain good account standing.

Reporting Additions & Updates in Report Center
We continue to improve and expand reports, including those required by federal or state regulations. We updated our Promoting Interoperability reports and added Lost Patient and Infusion Profitability reports. Our Report Center now includes essential filters in the Transaction Entry report, including Next Appointment on the standard receipts. These updates help streamline data tracking and improve access to insights.

Write-off by Allowed Amount
Our mass write-off feature now supports partial write-offs based on allowed or expected amounts, automating what was previously a manual, charge-by-charge process. This improvement reduces time spent on financial reconciliation and streamlines workflows.

Patient Billing Export to CSV
A new export button has been added to the patient billing processed window. This feature allows you to instantly generate and download a CSV file of processed credit card data, improving reporting and data management workflows.

Practice Management Beta Features

Enhanced Scheduler
We're making scheduling faster and simpler with a major update! This revamp brings improved performance and streamlined workflows, including custom color options for holds and appointments to make organization a breeze. We're enhancing our time zone features for added convenience. New patient cards are being introduced, allowing you to make demographic updates directly from the scheduler.

Patient Merge
We're simplifying the patient merge process by combining all practice management and EHR data from two records into one while removing the duplicate record. This tool makes cleaning up and maintaining accurate patient information quick and effortless.

ELECTRONIC HEALTH RECORDS

Clinical Notes AutoSave
This new feature enhances both efficiency and documentation workflows by automatically saving your notes in real-time. With this feature, critical information is safeguarded, allowing you to focus on delivering exceptional patient care without interruption.

Population Health
Our new population health reporting system for MIPS offers a comprehensive, all-in-one solution for population health and value-based care, including seamless MIPS and Qualified Registry reporting. If you're participating in value-based care programs, we can support you in improving patient outcomes and maximizing quality performance.

Bright Futures Pediatric Template Content
AdvancedMD has partnered with the American Academy of Pediatrics and its Bright Futures initiative to integrate licensed pediatric standards and care templates into our EHR. These tools include intake forms, clinical note templates, guides, and family handouts—helping pediatricians support patients' well-being from birth through adolescence and into young adulthood.

Improved Visibility of Annotations & Messages on Dashboard Worklists
Spend less time searching and save time reviewing items in your worklists with improved visibility of annotations and messages directly associated with chart items. Now all relevant details are conveniently accessible in one place.

Automatically Link Lab Result to Lab Order
Lab results are now more efficiently organized with direct links to their corresponding lab orders. Additionally, lab PDFs are connected to the results in the timeline, reducing administrative time when results fail to map automatically to the correct patient or provider. You can also choose to send Lab PDFs to the Documents Card in addition to the imaging results PDF.

Renewal & Change Requests Workflow Enhancements
The updated Renewal and Change Requests workflow lets you review and approve renewal and change requests directly from the pharmacy donut or patient chart. The new Renewal Card centralizes all patient renewal and change requests, streamlining management workflow. From patient Change and Renewal requests, you can also manage electronic prior authorization requests, PDMP, and messages. Additionally, the Renewal and Change Request form now matches the format of the prescription form in the Medications Card.

Enhance NewRx, Refill, Renewal & Change Request Workflow
We've simplified the NewRx, Refill, Renewal, and Change Request workflows giving you better visibility, fewer clicks, and easier overall prescription management. Pharmacy instructions and directions from the prescription are displayed as you hover. Last Fill and Sold Date from the pharmacy are displayed in the Medications List. Simplifying sign and eSend workflow are now managed with one button, while allowing individual actions, if needed. We streamlined the renewal process to a single Renew button. This gives you safer and more efficient prescribing. You now have more visibility of the status of a requested electronic prior authorization for the prescription. Use the All for Date checkbox in the medication list to select all prescriptions written today to sign and send all at one time with one click. The Message screen in our EHR has a new updated look and feel and it can be accessed and used from renewal and change requests.

Updated Outbound CIE Document (C-CDA)
We've enhanced our interoperability tools by updating the Consolidated Clinical Document Architecture or C-CDA to support a broader range of patient clinical data exchange. These updates align with the HTI-1 ONC/ASTP regulations and the US Core Data for Interoperability or USCDI version 3 set of clinical data elements for health information exchange. Additional USCDIv3 data elements will continue to be introduced throughout 2025 to further improve health information exchange capabilities.

EHR Beta Feature

Editor for Patient Note Narratives
We're introducing a new in-app editor within our EHR to simplify the creation, editing, and management of narrative document templates. The HTML-based rich text editor eliminates the need for Word Merge, giving you greater flexibility to design templates. Narrative documents will now share consistent header and footer information across templates, streamlining the process further. This integrated, user-friendly solution saves time and boosts efficiency by making it easier to manage patient note narratives.

Patient Engagement

Patient Pre-call Telehealth Waiting Room
We're introducing a new feature for Zoom telehealth that allows patients to click the Join Call button from the Meeting Hub up to 60 minutes prior to the appointment. This gives patients time to ensure they have the Zoom application set up and test their microphone and camera ahead of time. When you start the call from Scheduler, in the Provider List View, you are prompted to admit the patient from the virtual waiting room, allowing you to begin the session without delay.

Intake Improvements in Telehealth
We've added new settings to streamline front-desk workflows for telehealth appointments. You can allow or require patients to enter a credit card on file prior to their visit and customize the terms and conditions. A flat fee can be assigned to appointment types based on the service provided. A new worklist allows you to track and manage insurance card images uploaded by patients.

Provider Matching Updates to Holds
We've updated the calculation for available timeslots in Provider Matching to align with the logic used in Online Scheduling. When using the Show Only Hold Times option in Provider Matching, the system will now generate all available hold times based on the selected filters.

Toggle for Online Payments
A new system default allows you to activate or deactivate online statements. You can now manage settings before having the feature go live in your key.

Mobile

Telehealth Pre-call Chat for Clinical App
The chat feature can now be accessed from the Provider List View in the scheduler within the AdvancedMD Clinical App. This allows you to respond to patient inquiries for upcoming telehealth appointments in real time.

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