Assembly Neos

January 2025 Release:
Additional Enhancements/Fixes

Advanced Search:

- Provider roles have been added as a column in Advanced Search (currently you can add a Provider Role as a filter in any Contact search within Advanced Search, but you are not able to add the Provider Role as a column in any of those searches).
- Added the following Standard Reports for Advanced Search:
  - Case Document Search
  - Conflict Check
  - Detailed Medical Bill Summary
  - Detailed Medical Bill Summary by Provider
- The Memo Field in Value Records that are linked to Time Records is now editable.
- Resolved issue with Open Checklist creating a "Completed by" & "Date" when using Bulk Actions.

Case Related:

- Case Tab filters no longer persist across cases. When filtering within a case tab (such as for Notes, Value, Time, Documents, and Calendar) the filters now persist for the user within the same case and session. The search filters no longer persist in other cases (sorting and columns will continue to persist for a user within case tabs).
- Address Line 2 now displays in the Party Preview side pane when selecting a party from the Party Tab of the case.
- The "Provider" filter has been added to the filter in the Values tab.

- DTF values now copy the value category from its parent: When a user creates a "DTF" value item, from a transaction, the "DTF's" value category will now be the same as the value category from the originating value item.
- Moved "Reply All" out of the 3 Dot Menu in Message Details (When a user is composing a message, when they are in the message details, then they will see the following: Reply/Reply All/Forward as secondary buttons). Under the 3 Dot Menu you will now see: Reply/Delete/ Move To/Delete/ Mark as Read.
- Updates to checklist items made in bulk are now done in the background and users receive a notification when complete.
- Users can edit their value notes from the side pane, so they no longer must open the full detail screen to make edits.
- Resolved issue with Multiple Document Email Subject Display: Emailing a single document from case documents populates case details in the subject. If you multiselect multiple documents however, it instead provides a document count in the subject. It also provides a document count in the subject when emailing multiple documents from several cases in browse docs. Now the subject will show case details when emailing any number of documents from case docs.

UX/UI Related:

- Updated the Header throughout Neos. Users will now see the Header expand to the full width of the page so that all the valuable information is laid out. Padding was also updated to be consistent across Neos.
- Updated the Navigation Tabs throughout Neos - the navigation tabs now appear below the header and have icons when necessary.
- Updated “Browse Intakes” to the SyncFusion grid:
  - Updated all filters (but Party Name) to sit in the 3-Line Filter Menu.
  - Bulk Actions now works the same for Intakes.
  - The “Column Chooser” sits in the 3 Dot Menu in the Header for both Intakes and Cases.

- Moved the play/pause button for the announcements section of the login page to the bottom of the page. Also updated the layout when the captions were long, or no background was defined.

Settings:

- The UTBMS Code was added to the Task in the "Exception Rates Table" like we can do today in Task Dropdowns.
- Custom Invoice Information: Allows users to include details on the invoice (such as the Tax ID) so that they no longer must manually add it to every invoice. There will be a 250 max character input for this field.

Miscellaneous:

- Resolved issue with Intakes: When opening an Intake a user will now see "Activity Feed Plat" above it. This indicates to users that this is behind the NeosAI Platinum Package.
- PDFTron was updated to the latest version.