

Release Notes (Date: 07.22.2025)

Enhancements:

1. Resident: Pre-populating the memo field when closing the resident.
2. Manage Vendor: Updated UI to accommodate address 2 and postal code.
3. File Export: Added option to separate the deposits and direct deposits for Reliable Health Systems.
4. Account Settings: Clean up the UI to separate out Account settings and password update sections.

Bug Fixes:

1. Transactions: Fixed height issue in transactions screen.
 2. Residents: Resident names mapping fix in transactions grid.
 3. Transactions: Fixed delete receipt issue.
 4. File Export: Included headers for national care systems export file.
 5. 2FA: Hiding 2-factor checkbox in security tab for pilot corps and facilities.
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Release Notes (Date: 06.20.2025)

Enhancements:

5. Debit Card: Added an option to remove the transactions.
6. Direct Debits: Remove default credit option for Direct debit screen.
7. Admin: Resident Groups- Added alpha numeric support for Facility field.
8. UPS service: Updated UPS Auth service with the modern secure implementation.
9. Resident Screen: Send Funds to Abandoned Property
Added an alert message when Abandoned Property option is selected.
10. Manage Checks: Added an additional note when voiding the check.
11. Added sort and filter option for Debit Card transactions.
12. Updates to US bank Adjustments report.
13. Reports: Added Burial Addendum form and Abandoned Property Report Multi(Corp) reports.
14. Reports: Transaction type Summary by description Report: Added Resident filter

Bug Fixes:

6. Surety Bond File Upload: Added Client-side validation for File Size.
 7. Transactions: Fixed Delete withdrawal receipts issue.
 8. Offset vs Disb report: Updated the report to handle the hybrid Trustar accounts
 9. Debit Card Webhook : Fix to save debit card transactions and activity.
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Release Notes (Date: 05.24.2025)

Enhancements:

1. Debit Card updates: Added new updates and improvements to Debit card feature. Added default ACH vendor email for Debit cards.
2. Updates and Improvements to Debit card UI.

Bug Fixes:

1. Debit card Design - Fixed Juice fin Eps file issue.
 2. Withdrawal Transactions grid UI height fix.
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Release Notes (Date: 04.26.2025)

Enhancements:

1. Print Checks: Added Pop up to revert the printed checks.
2. RDC- Updated RDC message for IE browsers.
3. Print Checks: Add a log entry when reverting the printed checks.
4. Print Checks- Adding a log entry when the check numbers are cleared.
5. print check confirmation popup disabled by using server-side cookie.
6. Updates to US bank Adjustments report (Corp : Mentor)
7. Resident: Add Date of birth field in resident account screen.
8. Maintenance- Deactivate inactive users - Excluding SSO users
9. ****Debit Card Feature**** Implemented Debit card feature.
10. Debit Card Feature: Backend fixes and updates to create withdrawal record from Debit Card transactions.
11. Account Settings- UI updates when validating user Phone number.
12. Debit Cards: Extend the custom toggle for facility.

Bug Fixes:

1. MFA: MFA-Remember browser checkbox validation
 2. Account Settings- MFA: Bug fix to disable the Save button.
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Release Notes (Date: 02.22.2025)

Enhancements:

1. Resident: Hide Direct debit form, if the uploaded form is rejected/not uploaded.
2. Resident- Close Resident pop-up - pre populate the facility address, memo and name on check.
3. New popup added while void check "Voiding a check in the check register DOES NOT return funds to resident account(s). This would require a Transaction Batch Reversal"
4. Changes to Direct Debit Authorization form to populate resident ID - Customized for Corp 0579.
5. Changes to Direct Debit Authorization blank form - Customized for Corp 0579 to add "Day of the Month" for debit frequency and "attach void check".

Bug Fixes:

1. Invoice (Advice of Debit) Report: Compress line item spacing on invoice
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Release Notes (Date: 01.18.2025)

Enhancements:

1. MFA- Custom implementation: Implemented custom 2FA in RFMS to force the enrolled customers to 2FA. With this option, users can't disable the 2FA option. Mandating phone number and text message validation for User sign in.
2. Trial Balance Report: Rep Payee info on Trial Balance report - Added Rep payee name filter.
3. Twilio- Updated text message service to incorporate latest security standards. accounts.
4. BillPay- Implemented BillPay Address validation.
5. Print Checks: Print Checks- Confirmation - Added confirmation box and options to revert the printed checks.
6. Reports improvement- Created new recent reports for the Withdrawal and Deposit Transaction.

Bug Fixes:

1. Check Order: Remove 3 to A Page product options for Citi bank facilities.
2. BillPay- Check tracking: Check tracking: Updated the tracking URL to google to support multiple shipping carriers
3. Pay Vendor- bug fix in pay vendor details tab.
4. Check Images: Removed displaying check image for Voided Bill Pay Checks.
5. Check images report-: Bug fix to show the check image.
6. Mobile Withdrawals receipts: Validate Source code for Withdrawal records.