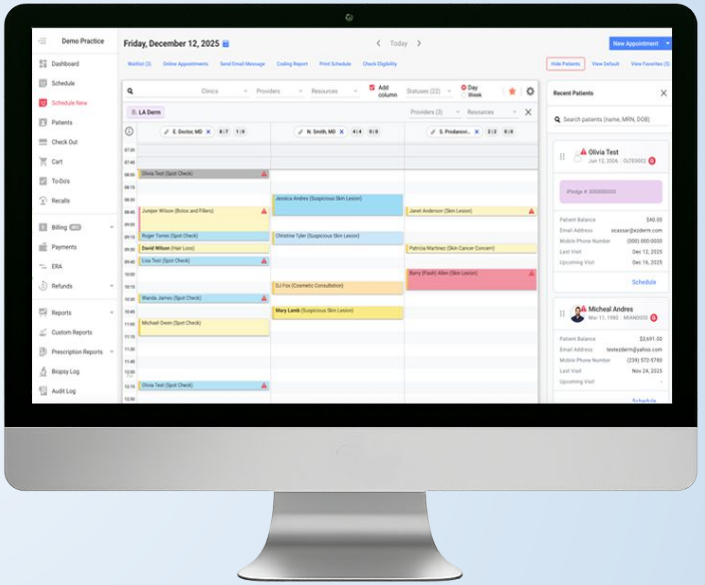
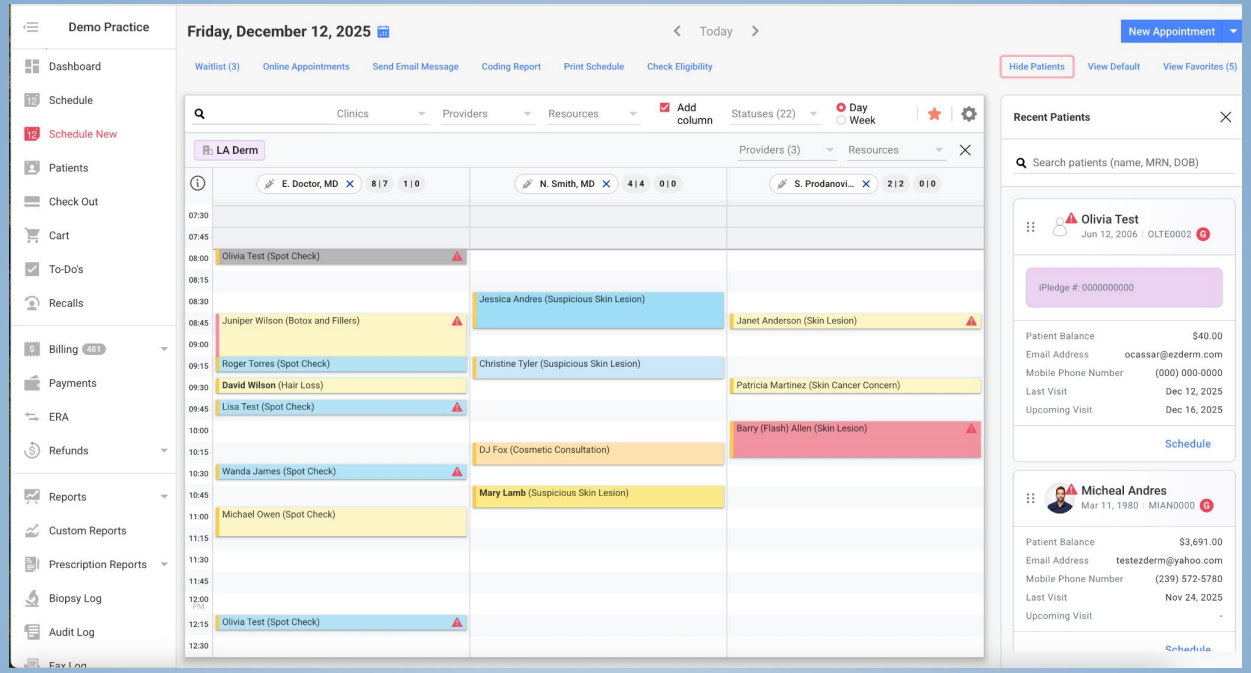


New Reporting Insights Advanced Scheduler Introducing Side Kick

First look at our Advanced Scheduler, launching December 29, 2025.
Best practices for getting the most out of your reports with recent product enhancements.



1

Meet the New Schedule

Key new functionalities on the schedule

1

Advanced Filtering

Advanced filtering options, making it easier to manage complex schedules across multiple providers, clinics, and resources.

2

Favorite Views

Ability to save multiple favorite views of the schedule based on user.

3

Add Clinic Colors

Assign a color per clinic to help with differentiation

4

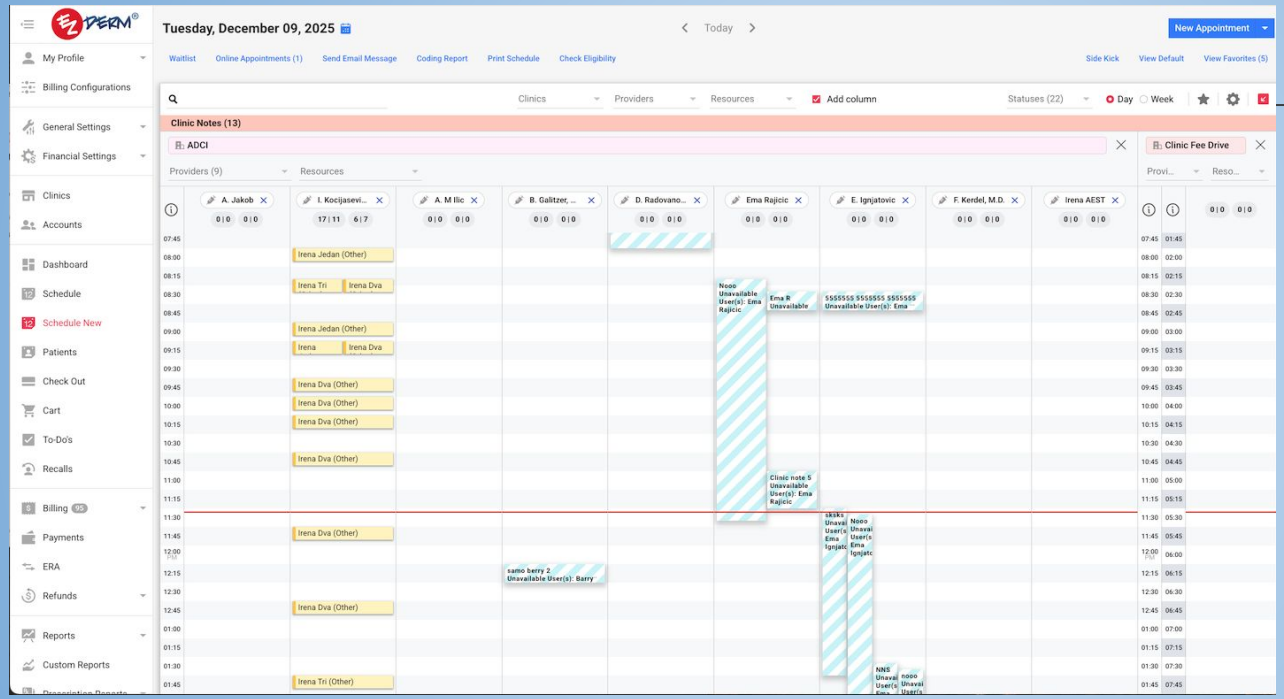
Side Kick View

Side Kick is a new tool on the schedule that lets you search patients, view key scheduling details, and quickly access the last 30 patient charts you've viewed.

5

Drag & Drop Scheduling

From the Side Kick, you can drag and drop patients for quick scheduling.



Fit to Screen

Click this icon to include all columns (up to 10) on one screen

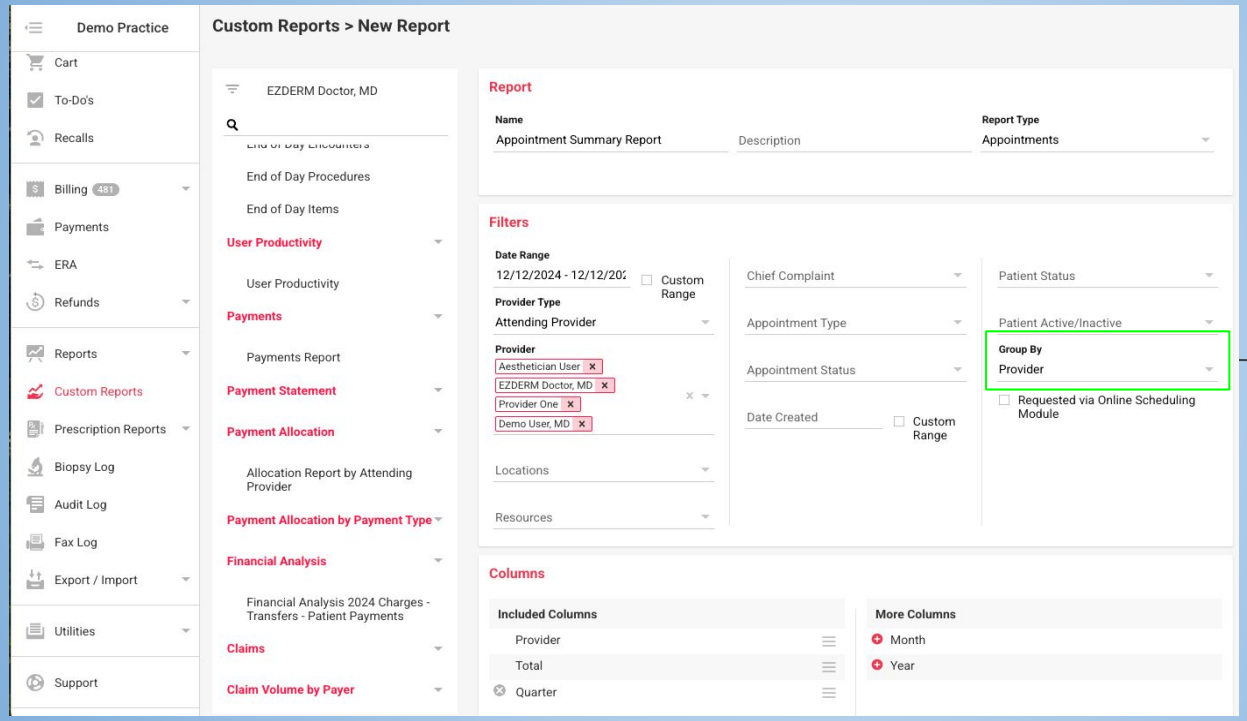
Appointment Summary

Provider	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Total
Aesthetician User	0	3	11	1	4	19
Demo User, MD	25	93	117	136	15	386
EZDERM Doctor, MD	134	720	552	641	623	2670
Provider One	0	13	10	2	2	27
Total Number of Appointments	159	829	690	780	644	3102

2

New Reports & Insights

Appointment Summary Report



NEW

Group by Filter

Group by Provider or Clinic to automatically update the columns and view monthly, quarterly, and yearly trends in appointments.

Additional New Columns & Filters Released in 2025

Report	New Columns / Filters Added
Custom Patients Report	Added **Gender Identity**, **Sexual Orientation**, **PCP**, **Referring Physician**, **Personal Note**, **CCOF**, **Location of Last Visit**, and **Location of Next Visit**
Items & Custom Items Reports	New **multi-select Patient** filter; **MRN** column added to Custom Item Reports
Patient Origination Report	Added **Patient Date of Birth (DOB)** column
Appointments & Custom Appointment Reports	New **multi-select Appointment Type** filter; added **Street Line 1**, **Street Line 2**, **City**, **State**, **Zip**, **Location of Last Visit**, and **Location of Next Visit** columns
Payments & Custom Payment Reports	Added **Created via EzLink only** filter (unchecked by default)
Billing Charges & Custom Charges Reports	Added **Payment / Adjustment Date** filter for payments, adjustments, and allowed amounts with predefined and custom date ranges

New Report

Claims - December, 2025

Claim ID	Claim Date	Claim Amount	Claim Status	Payer Name	Procedure Code	Clinic Location	CPT Code Units	Diagnosis Code 1
EZ10023133	12/20/2024	$472.60	Ready for Electronic Submission	Blue Cross Blue Shield of Illinois - BCBS	99211	LA Derm	1	D48.5
EZ10023133	12/20/2024	$472.60	Ready for Electronic Submission	Blue Cross Blue Shield of Illinois - BCBS	11102	LA Derm	1	D48.5
EZ10023133	12/20/2024	$472.60	Ready for Electronic Submission	Blue Cross Blue Shield of Illinois - BCBS	17000	LA Derm	1	L57.0
EZ10023133	12/20/2024	$472.60	Ready for Electronic Submission	Blue Cross Blue Shield of Illinois - BCBS	17003	LA Derm	8	L57.0
EZ10046062	12/25/2024	$249.72	Ready for Patient	Aetna	99204	FL Dermatology	1	D48.5
EZ10727679	03/24/2025	$453.12	Denied	Blue Cross Blue Shield of Illinois - BCBS	99213	LA Derm	1	D48.5
EZ10727679	03/24/2025	$453.12	Denied	Blue Cross Blue Shield of Illinois - BCBS	11102	LA Derm	1	D48.5
EZ10727679	03/24/2025	$453.12	Denied	Blue Cross Blue Shield of Illinois - BCBS	11103	LA Derm	1	D48.5
EZ10881115	04/11/2025	$550.62	Ready for Electronic Submission	Aetna	99213	LA Derm	1	L70.0

Claims Report

The Custom Claims Report delivers a detailed CPT-level view of all claims within a selected date range. This report provides a line-by-line breakdown of every claim, including individual CPT codes, helping practices track claim volume, analyze charges, and identify trends with precision.

Custom Reports

Report Type:Claims

Users can configure up to 40 columns to tailor the report to their workflow.

Filters:

Date of Service, Patient, location, claim status, insurance, claim amount, claim balance, provider, and post date

New Report

Claim Volume by Payer 2025

Payer Name	Payer ID	Claim Count	Percentage	Total Charges
Anthem BCBS	60	3919	26.01%	$1,393,280.00
United Healthcare Direct	87726A	2554	18.12%	$1,040,757.00
Cigna	62308J	2616	17.05%	$979,213.03
Aetna	60054A	2244	15.07%	$865,590.00
Medicare	13102	1643	14.42%	$828,098.01
Oxford Health Plans	6111	490	3.05%	$175,270.00
UMR	39026D	208	2.32%	$76,038.00
Allied Benefit Systems Incorporated	37308	9	3.66%	$3,555.00
HealthEZ	41178	8	0.16%	$3,478.00
WellCare Health Plans	14163X	5	0.07%	$3,346.00
Drop to Paper	AUTOMAPDTP	7	0.05%	$3,003.00

Custom Reports

Report Type: Claim Volume By Payer

Filters:

Date of Service, Encounter Date Posted, First Billed Date, Last Billed Date, Provider Type, Providers, Loaction Name, Group By, Segmented By

Claim Volume by Payer

This report provides a **percentage-based breakdown of all claims sent (whether printed & logged or electronically submitted),** within a selected date range. Claims are **grouped by the primary payer**. This report helps practices quickly identify top payers, understand payer distribution, and improve follow-up workflows and operational planning.

New Report

Patient Statement- Payment Report

Payment ID	Payment Date	Patient Name	Transaction Type	Amount	Statement Date	Paid Amount	Application
10260	06/05/2025	Jenn Calvert	Credit Card	$153.00	04/11/2025	$53.00	EzLink
10296	08/26/2025	Test Allen	Credit Card	$1,300.00	11/14/2024	$1,300.00	PMS
10306	09/19/2025	Wanda James	Credit Card	$500.00	01/16/2025	$181.00	Payment Widget
10324	10/31/2025	Wanda James	Cash	$500.00	01/16/2025	$200.00	Payment Widget
10330	11/06/2025	Wendy Willow	Credit Card	$9,572.47	10/07/2022	$30.00	PMS
10330	11/06/2025	Wendy Willow	Credit Card	$9,572.47	10/07/2022	$195.00	PMS
10330	11/06/2025	Wendy Willow	Credit Card	$9,572.47	10/07/2022	$50.00	EzLink
Total						$2009.00	

Payment Statement Report

This report offers a detailed **overview of payments applied to claims, items, and balance transfers after a statement has been sent.** It enables users to easily track and analyze post-statement payments using a range of available filters and columns.

Custom Reports

Report Type: Claim Volume By Payer

Filters:

Payment Date Created, Payment Date, Provider, Created via Payment Widget Only, Created Via Ezlink Only

New Report

Sent Rx Report_12_12_2025

Patient Name	MRN	Rx Name	Prescriber	Pharmacy	Sent Date	Location
Jane Smith	JS0001	Efudex 5 % topical cream	Sally Long, MD	CVS	12/12/2025	Palm Tree Dermatology
John Smith	JS0001	triamcinolone acetonide 0.1 % topical cream	Sally Long, MD	WALGREENS DRUG STORE	12/12/2025	Palm Tree Dermatology
Jane Smith	JS0001	Valtrex 1 gram tablet	Sally Long, MD	WALGREENS DRUG STORE	12/12/2025	Palm Tree Dermatology
John Smith	JS0001	ketoconazole 2 % Topical Cream	Sally Long, MD	WALGREENS DRUG STORE	12/12/2025	Palm Tree Dermatology
Jane Smith	JS0001	dutasteride 0.5 mg capsule	Sally Long, MD	WALGREENS DRUG STORE	12/12/2025	Palm Tree Dermatology
John Smith	JS0001	minoxidil 2.5 mg tablet	Sally Long, MD	WALGREENS DRUG STORE	12/12/2025	Palm Tree Dermatology
Jane Smith	JS0001	hydrocortisone 2.5 % topical ointment	Sally Long, MD	CVS	12/12/2025	Palm Tree Dermatology
John Smith	JS0001	fluconazole 100 mg tablet	Sally Long, MD	CVS	12/12/2025	Palm Tree Dermatology
Jane Smith	JS0001	nystatin 100,000 unit/gram topical ointment	Sally Long, MD	CVS	12/12/2025	Palm Tree Dermatology

Sent Rx Report

Provides visibility into **all electronically sent prescriptions**, giving practices greater transparency into prescribing activity across providers.

Prescription Reports

Report Type: Sent Rx Report

Filters:

Sent date range, Patient, Prescribed, Pharmacy, and location

Upcoming Webinars

2026 SRT Coding Changes

December 30 at 12p ET

Join us for an important overview of the new SRT coding requirements taking effect on January 1, 2026. Our coding specialist will walk through what's changing, how these updates impact your documentation and workflows, and the temporary workaround EZDERM users will follow until the product enhancement is released. This session is required for any practice performing SRT, whether you attend live or plan to watch the recording.

2026 Quality Measure Review & MVP Overview

January 7 at 12p ET

Join us for an overview of 2026 MIPS Quality reporting MVPs for dermatology practices. Our team will walk through what's changing for the new performance year, explain the differences between Traditional MIPS and MVP reporting, and clarify what practices should — and should not — be focusing on early in the year.