



CompuGroup™
Medical

Configuring Microsoft Edge Settings

May 25, 2022

CGMwebPRACTICE™
Fully Web-Based Practice Management Suite



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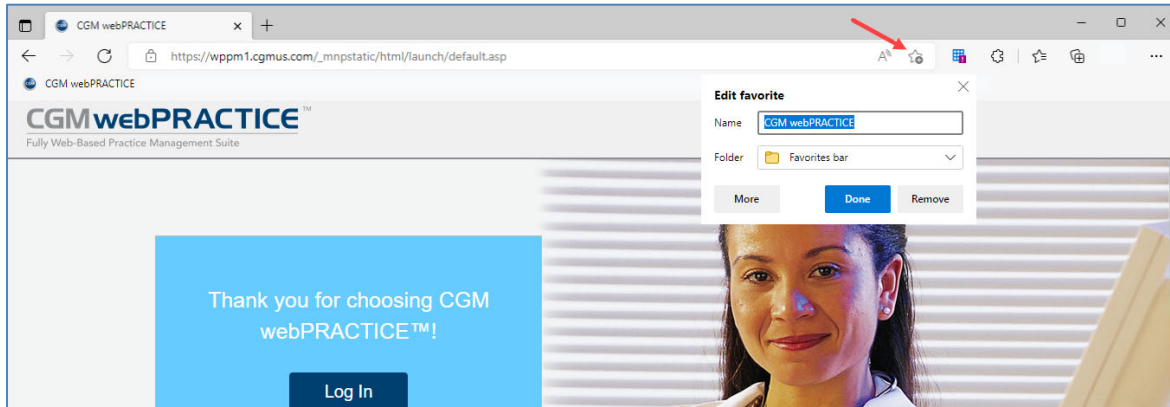
ABOUT THIS DOCUMENT

This document includes instructions for the Microsoft Edge settings needed when using CGM webPRACTICE and lists some functionality changes that had to be made when using Edge.

Add CGM webPRACTICE Website to Favorites

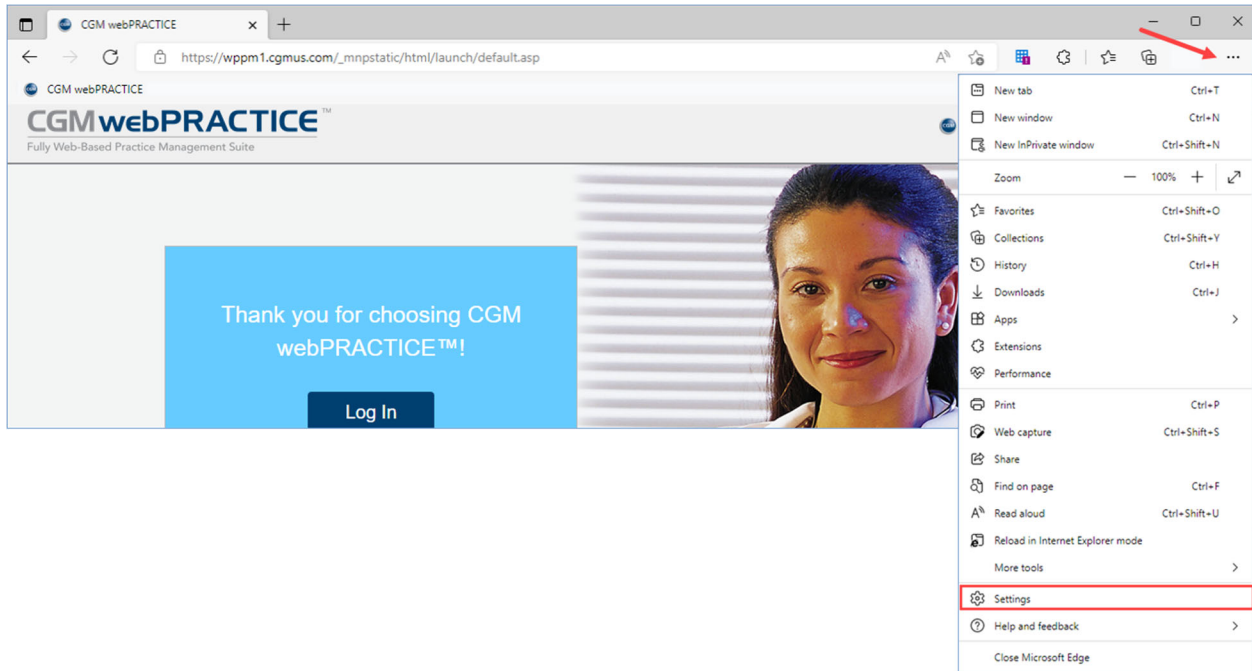
Add CGM webPRACTICE to your favorites, so you can quickly and easily access it each time.

Note: the URL shown in the sample screen below (and throughout the rest of the document) may not be the URL you need to use to access CGM webPRACTICE.



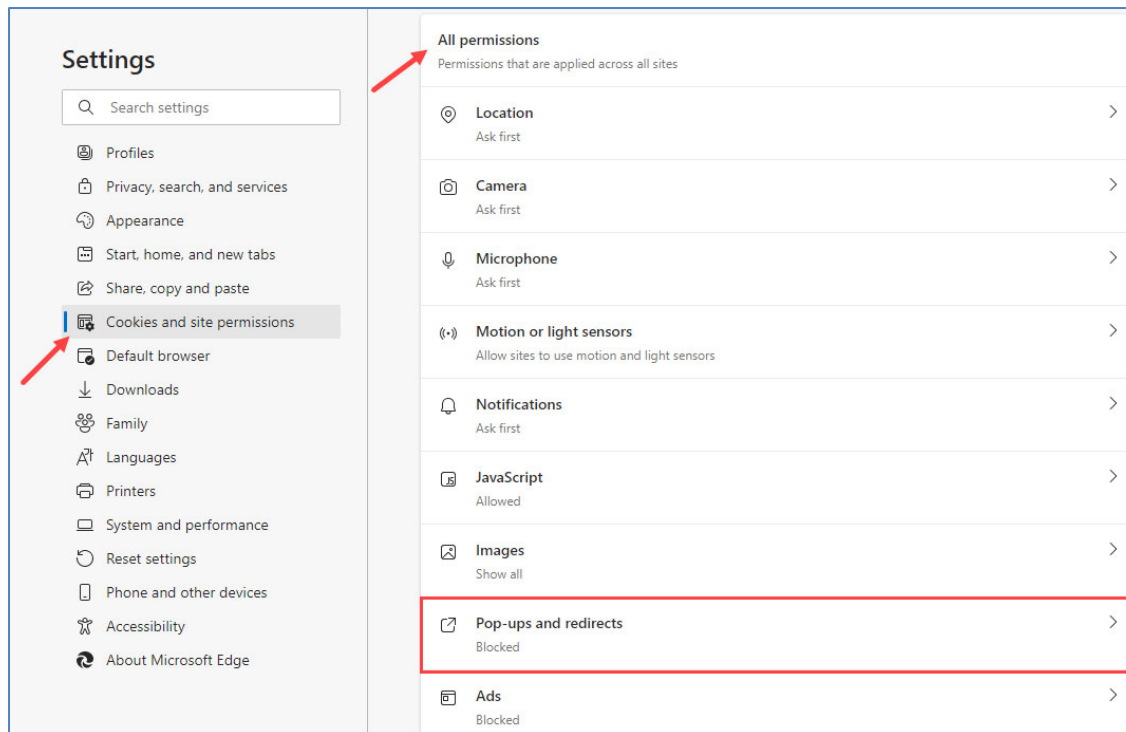
SETTINGS IN EDGE

From the CGM webPRACTICE website tab, click the **Settings and more** icon and select **Settings**.

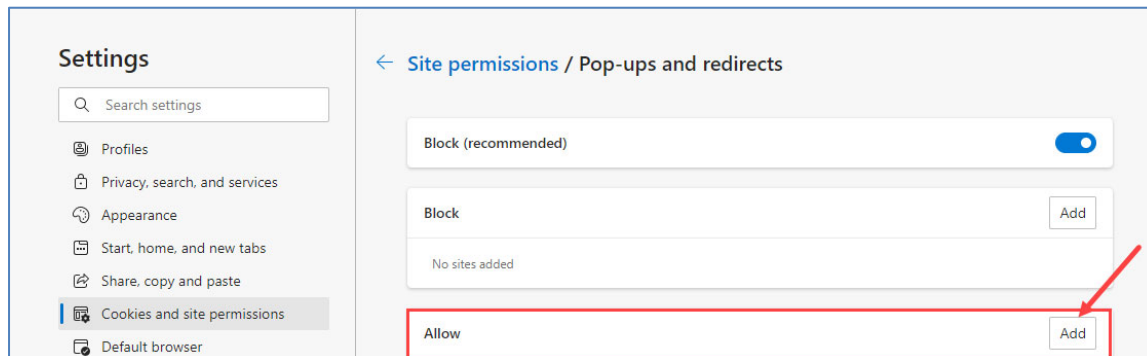


Allow Pop-Ups and redirects

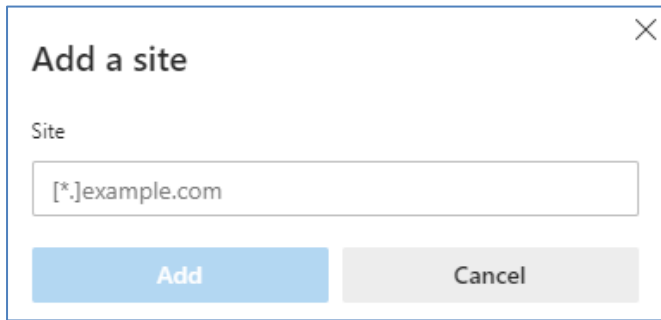
When the *Settings* window displays, click **Cookies and site permissions** then scroll down and click **Pop-ups and redirects** under the **All permissions** section.



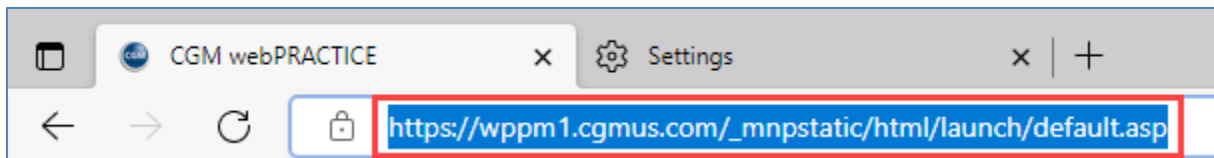
When the **Pop-ups and redirects** page displays and click **Add** to the right of **Allow**.



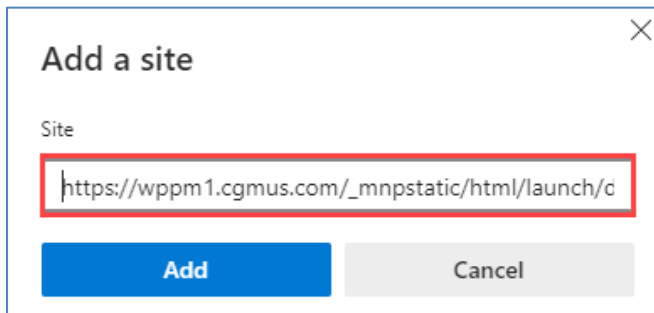
The *Add a site* window will display.



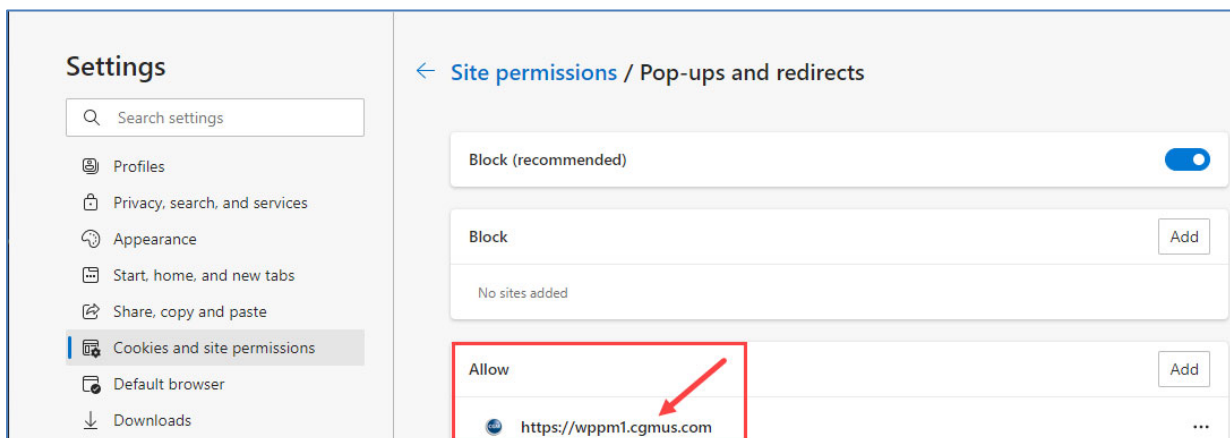
Click back on the CGM webPRACTICE tab, highlight and copy the URL.



Click back on the *Settings* window, paste the CGM webPRACTICE URL into the **Site** field then click **Add**.

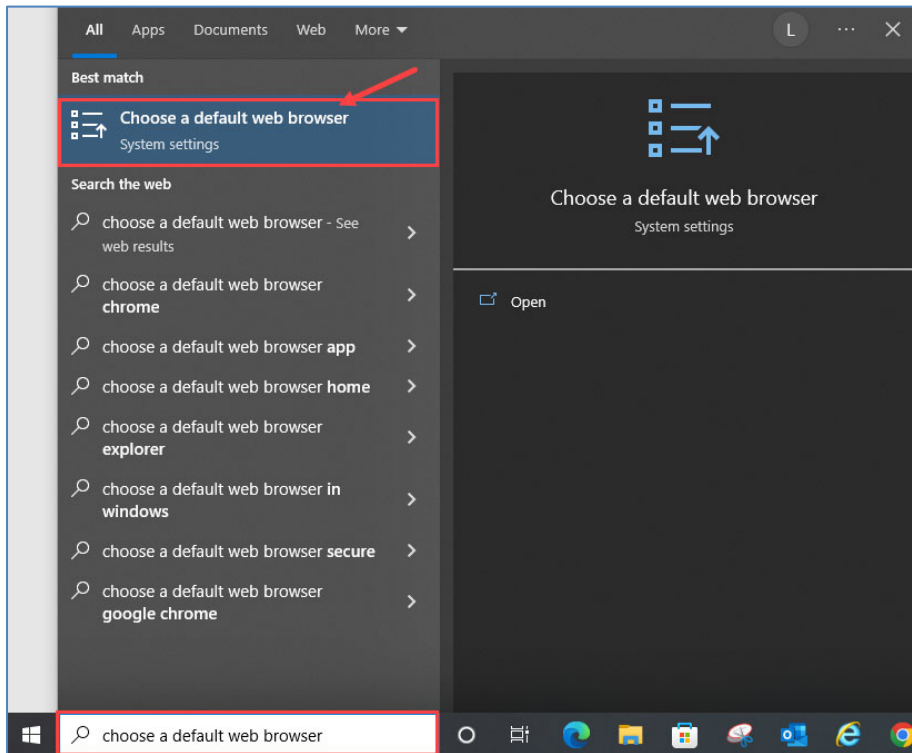


Confirm the CGM webPRACTICE URL displays under the **Allow** section.

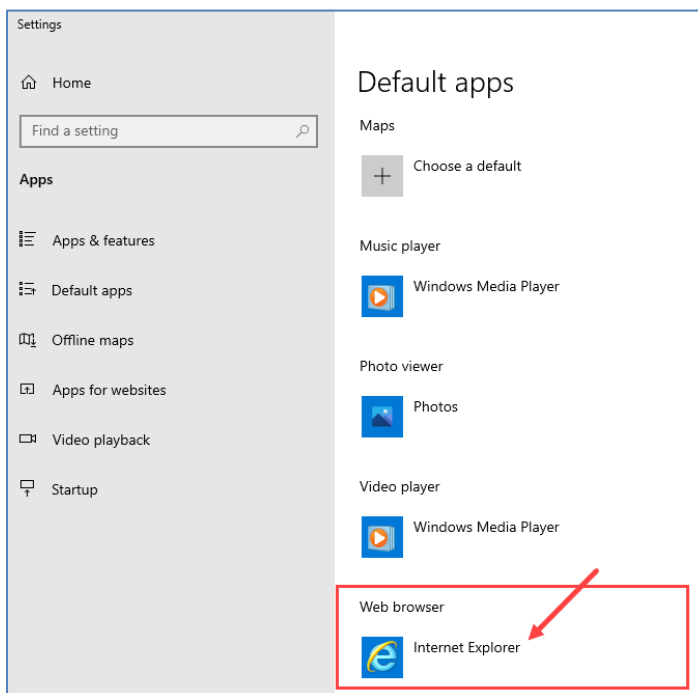


Set Microsoft Edge as the Default Browser

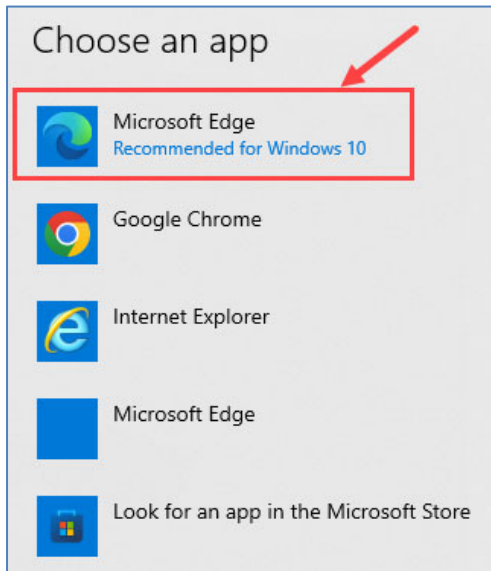
Click in the **Search** field, type “choose a default web browser” and click the *System Settings* option.



When the *Windows Settings* window displays, scroll down to the **Web browser** section, and click the app currently displayed.



From the *Choose an app* window, click **Microsoft Edge**.



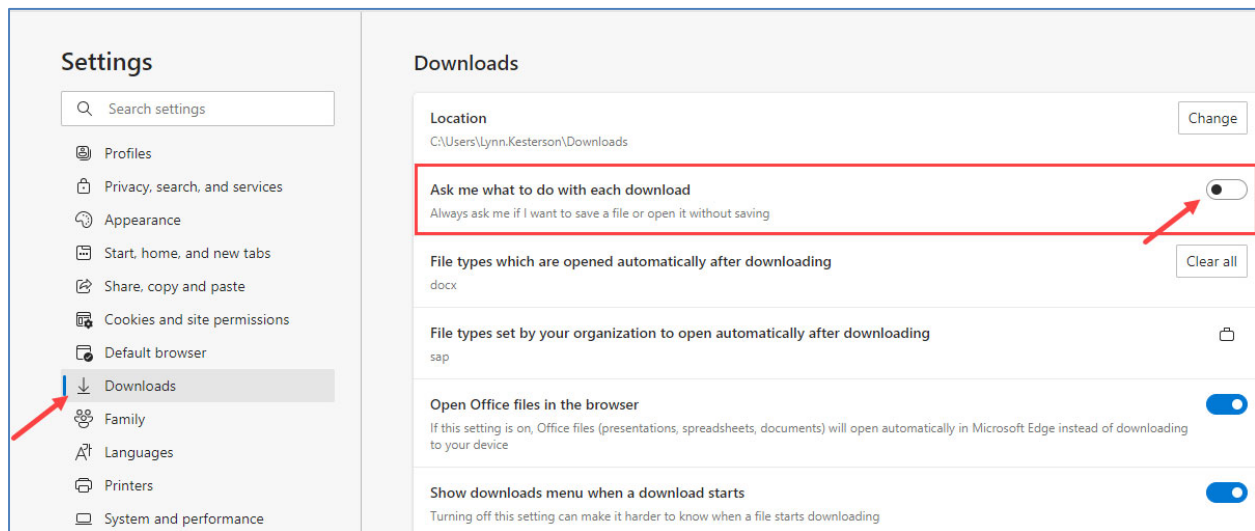
Close the *Windows Settings* window. If you have a shortcut icon saved to your Desktop for CGM webPRACTICE, it will automatically open CGM webPRACTICE using Edge after you complete this step.

FUNCTIONALITY CHANGES IN EDGE

Viewing Reports and Downloaded Documents

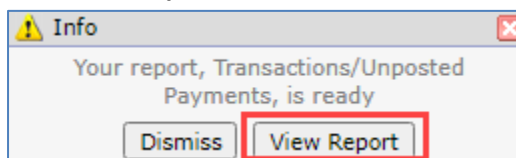
MyReports-View Report - When you print to MyReports and select *'notify me when report is complete'* in the Printers window, then click the **View Report** link in the Notification window, Edge will automatically download a document instead of opening it, unless you perform the steps listed below.

First, you need to access **Settings** (see *Settings in Edge* section), select **Downloads** and turn off the **Ask me what to do with each download** switch. This switch can be turned back on after you perform the next two steps for each document type you want to automatically open.

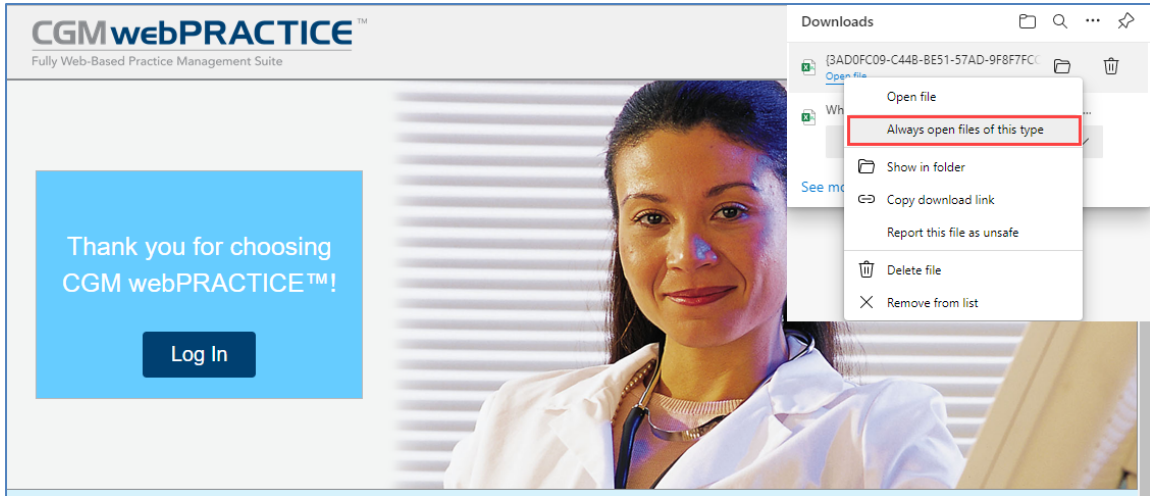


The following example is when you print a report to Excel in MyReports.

1. Click **View Report** to download the document (must only be done once per file type).



2. When the **Downloads** pop-up displays, right-click on the **Open file** link below that file and select "**Always open files of this type**".

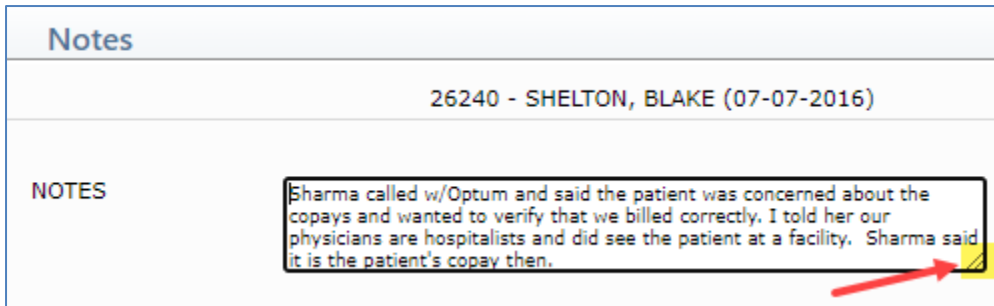


This completes the process. Now the Excel file will always OPEN instead of just downloading. The next time you print to MyReports, **View Report** will automatically open the Excel document. If you also print Word documents to MyReports, you will need to repeat these steps for Word.

To reset this feature, go to *Settings > Downloads*, click **Clear all** for the **File types which are opened automatically after downloading** option.

Resizing Text Boxes

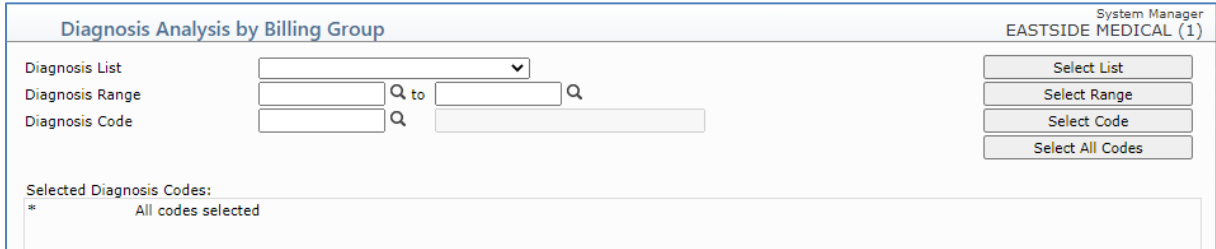
Text box fields that contain large quantities of text can be re-sized horizontally to display more text, by clicking and dragging the resize icon in the lower-right corner.



Diagnosis and Procedure Analysis Report Changes

Detailed Diagnosis Analysis and **Detailed Procedure Analysis** reports (all sorting options) (*Reports > Statistical Reports > Detailed Diagnosis Analysis*) and (*Reports > Statistical Reports > Detailed Procedure Analysis*)

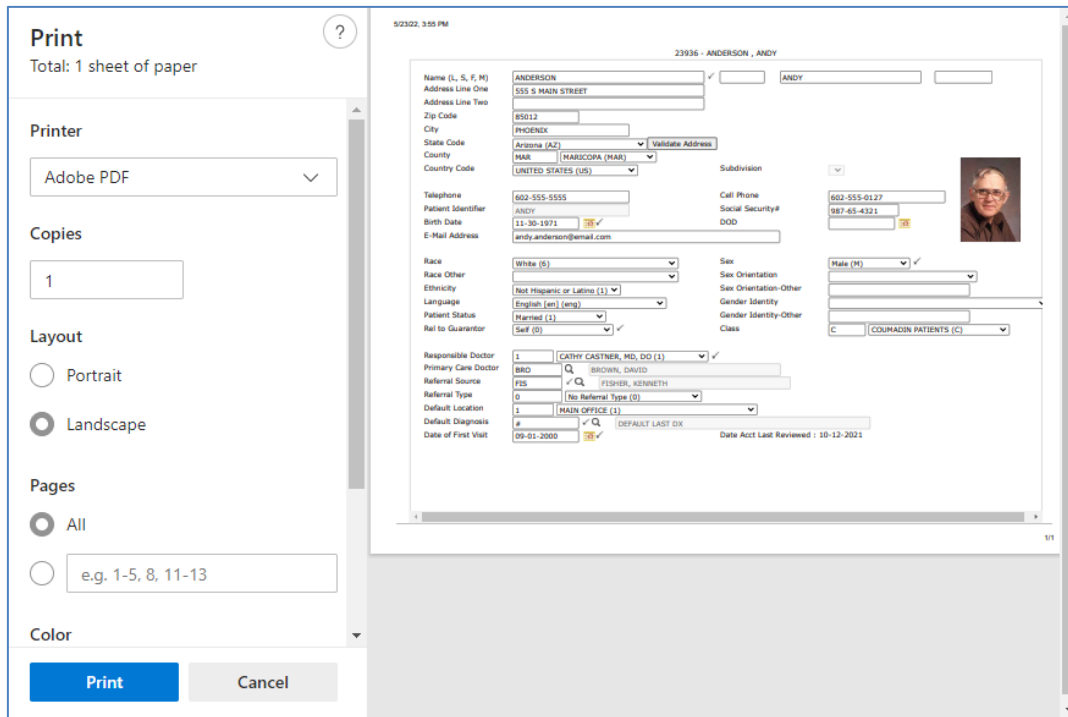
If you click **Select All Codes**, the screen will display **All codes selected** instead of listing out the individual codes. In addition, if you want to remove all the selected codes, you can type an asterisk (*) in the **Diagnosis Code** field and click **Delete**. The ability to remove specific codes from the list of selected codes is no longer available.



Printer Settings

When printing a screen from various functions using the printer icon in the lower-right corner, you may need to access the printer settings and adjust margins, scaling, layout, etc., so the page will print all the data properly. In the following example for the Patient Name and Address screen, the following settings were modified:

- Layout changed to Landscape
- Margins changed to Minimum

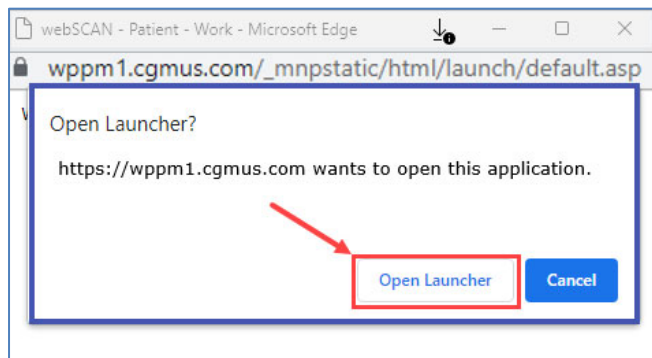


Another approach could be to change the Scaling so the data would print on one page.

CGM webSCAN

Change Patient Data – CGM webSCAN (Patient > Change Patient Data > CGM webSCAN)

Each time you click the **CGM webSCAN** Action Column button you must click **Open Launcher** to proceed with scanning. The reason for this extra step is because Edge does not provide a setting like IE did that would always allow the program to open automatically.







Rich Text Editor Changes

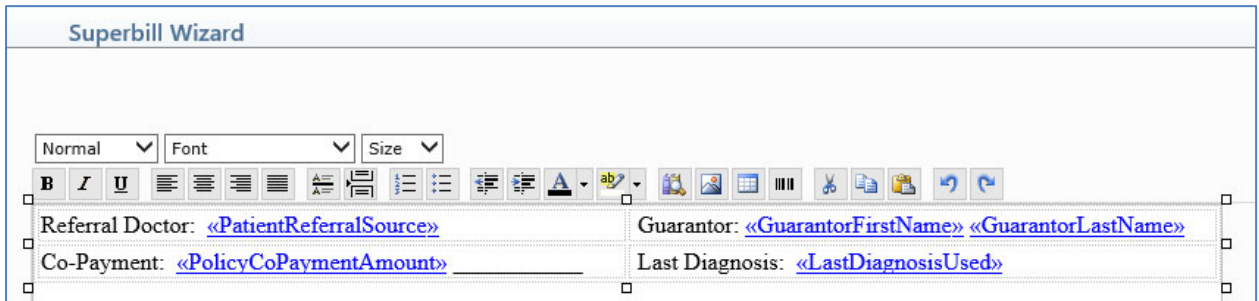
*Reports > DMS > DMS Letters > Maintain Letters-Rich Text Editor
System > Form Wizards > Superbill Wizard-Rich Text Editor*

The following modifications were made to the Rich Text Editor, when using Edge to create new documents or edit existing documents:

- Toolbar functions that had to be removed:

	Text Color
	Background color
	Barcode
	Paste

- Data elements, images, and table cells can no longer be resized. Example below from IE showing the resize handles. In Chrome, there are no resize handles available.



- The font or font-size for data elements can no longer be changed.
- Previously saved letters or superbills will not lose any existing formatting, but you will not be able to make any future edits for the items mentioned above.

Scanning and Attaching Images

Every function that previously provided **Acquire Image**, so you could scan images directly within CGM webPRACTICE or **Attach** previously scanned images was modified. When using any browser besides IE, you will only have the option for **Attach Image** and all scanning must be performed outside of CGM webPRACTICE. This change was made for the following functions:

- Patient > Change Patient Data-Patient Name & Address- Acquire Image
- Patient > Change Patient Data-Guarantor- Acquire Image
- Patient > Change Patient Data-Insurance-Add a policy, Acquire Front & Back Img
- Patient > Change Patient Data-Images - Acquire Image
- Patient > Change Patient Data-Authorizations-Add/Edit an Auth-Acquire Image
- Patient > Patient Registration-Name & Address-Acquire Image
- Patient > Patient Registration-Ins Carriers-Acquire Image
- Reports > DMS > DMS Letters > Maintain Letters-Rich Text Editor
- System > Form Wizards > Superbill Wizard-Rich Text Editor
- Transactions > Payment Entry Function
- Transactions > Transaction Batch Control > Create a Batch
- Transactions > Transaction Batch Control > Edit a Batch
- Transactions > Electronic Remittance Advice (ERA) > Import and Post ERA Files (Post and select a batch)

Note: The Attach image function in Edge accepts the following file types: .gif, .jpg, .png and .bmp (.png is new – it wasn't allowed in IE).

Paper Claim Alignment Changes

The **Scan** function was changed to **Attach**. After you print the paper claim using the **Print** function, you will need to scan it outside of CGM webPRACTICE and then use the **Attach** function to proceed with the alignment process.

Note: The Attach image function in Edge accepts the following file types: .gif, .jpg, .png and .bmp (.png is new – it wasn't allowed in IE).