



CompuGroup™  
Medical

**CGM webPRACTICE™**  
**Information for CGM eMEDIX®**  
**Payment Portal Payments**  
**October 2023**

**eMEDIX®**

Reimbursement Solutions

**CGMwebPRACTICE™**

Fully Web-Based Practice Management Suite



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## NOTICE

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# PROCESSING & VIEWING CGM EMEDIX PAYMENT PORTAL PAYMENTS

## Unposted Payments - Processing Payment Portal Payments

If you have been activated for the *CGM eMEDIX Payment Portal*, any payments received from the CGM eMEDIX Payment Portal will be stored in the *Unposted Payments* function.

- **CGM eMEDIX Payment Portal** will display in the **Source**-column
- **PP** for Payment Portal will display in the **Pmt Method** column
- The Payment Codes entered in the *CGM eMEDIX Payment Portal Integration* function will display in the **Payment Code** column

Unposted Payments												System Manager EASTSIDE MEDICAL (1)		
*** Filter Applied *** (Payment Method = 'CGM eMEDIX Payment Portal')														
	Status	Source	Account	Patient Name	Amount	Payment Date	Payment Type	Payment Code	Pmt Method	Pmt Dr	Loc	Remarks	Patient Balance	Last Service Date
	<input type="checkbox"/>	CGM eMEDIX Payment Portal	26021	ANDERSON, STEPHEN	1145.00	03-08-2020	ROA	Online Visa (OLV)	PP				-3.04	09-12-2019
	<input type="checkbox"/>	CGM eMEDIX Payment Portal	26131	GLOVER, DONALD	255.42	03-08-2020	ROA	Online Amex (OLAX)	PP				0.00	07-22-2019
	<input type="checkbox"/>	CGM eMEDIX Payment Portal	26153	ROSS, BIRDIE	60.00	02-17-2020	ROA	Online Visa (OLV)	PP				0.00	01-01-2019
	<input type="checkbox"/>	CGM eMEDIX Payment Portal	26172	PAISLEY, BRAD	6.60	02-17-2020	ROA	Online Mastercard (OLMC)	PP				0.00	11-25-2019
	<input type="checkbox"/>	CGM eMEDIX Payment Portal	26201	WASHINGTON, GEORGE	11.12	04-23-2019	ROA	CREDIT CARD PMT (CC)	PP				-18.14	02-04-2020
	<input type="checkbox"/>	CGM eMEDIX Payment Portal	26202	LINEER, MARK	203.46	02-17-2020	ROA	Online Visa (OLV)	PP				0.00	12-13-2019
	<input type="checkbox"/>	CGM eMEDIX Payment Portal	26240	SHELTON, BLAKE	13.50	04-23-2019	ROA	CREDIT CARD PMT (CC)	PP				12181.36	04-22-2020
	<input type="checkbox"/>	CGM eMEDIX Payment Portal	26272	RAISIN, MIA	32.49	04-23-2019	ROA	CREDIT CARD PMT (CC)	PP				1.00	06-11-2018
	<input type="checkbox"/>	CGM eMEDIX Payment Portal	26303	KESTERSON, LYNN	4.00	04-23-2019	ROA	CREDIT CARD PMT (CC)	PP				-14.00	02-19-2018
	<input type="checkbox"/>	CGM eMEDIX Payment Portal	26305	FREILE, JENNIFER	12.00	04-23-2019	ROA	CREDIT CARD PMT (CC)	PP				1.00	01-01-2017

You can use the **Add/Edit Filter** Action Column button in *Unposted Payments* to view only Payment Portal payments by selecting the **CGM eMEDIX Payment Portal** option for the **Source** field.

### Unposted Payments Filter

Doctor:

Location:

Begin with Payment Date:

End with Payment Date:

Source:

Payment Type:  ROA  Co-Payment  All

Payment Method:

WP-Pmt Device:

Payment Code:

Status:

The Filter settings will display at the top of the *Unposted Payments Summary* screen.

Unposted Payments												System Manager EASTSIDE MEDICAL (1)
*** Filter Applied *** (Source = 'CGM eMEDIX Payment Portal')												
	Status	Source	Account	Patient Name	Amount	Payment Date	Payment Type	Payment Code	Pmt Method	Patient Balance	Last Service Date	
<input type="checkbox"/>		CGM eMEDIX Payment Portal	26021	ANDERSON, STEPHEN	1145.00	03-08-2020	ROA	Online Visa (OLV)	PP	-3.04	09-12-2019	
<input type="checkbox"/>		CGM eMEDIX Payment Portal	26131	GLOVER, DONALD	255.42	03-08-2020	ROA	Online Amex (OLAX)	PP	0.00	07-22-2019	
<input type="checkbox"/>		CGM eMEDIX Payment Portal	26153	ROSS, BIRDIE	60.00	02-17-2020	ROA	Online Visa (OLV)	PP	0.00	01-01-2019	
<input type="checkbox"/>		CGM eMEDIX Payment Portal	26172	PAISLEY, BRAD	6.60	02-17-2020	ROA	Online Mastercard (OLMC)	PP	0.00	11-25-2019	
<input type="checkbox"/>		CGM eMEDIX Payment Portal	26201	WASHINGTON, GEORGE	11.12	04-23-2019	ROA	CREDIT CARD PMT (CC)	PP	-19.14	02-04-2020	
<input type="checkbox"/>		CGM eMEDIX Payment Portal	26202	LINEER, MARK	203.46	02-17-2020	ROA	Online Visa (OLV)	PP	0.00	12-13-2019	
<input type="checkbox"/>		CGM eMEDIX Payment Portal	26240	SHELTON, BLAKE	13.50	04-23-2019	ROA	CREDIT CARD PMT (CC)	PP	10986.15	04-22-2020	
<input type="checkbox"/>		CGM eMEDIX Payment Portal	26272	RAISIN, MIA	32.49	04-23-2019	ROA	CREDIT CARD PMT (CC)	PP	1.00	06-11-2018	

## Patient Transaction History - Viewing Payment Portal Payments

The **Payment Portal Statement ID** prints on *Electronic Patient Statements* or *Electronic ECOLLECTIONS Letters* and is required for patients to make an online payment. If the patient happens to misplace their statement or letter and calls the office to ask for the Statement ID, you can look it up from within their Transaction History (*Patient > Change Patient Data > Transaction History*).

Transaction History											System Manager EASTSIDE MEDICAL (1)	
Patient: 25831 - Mayer Jr, Kayo Tyler** 3300 N Central Ave Phoenix, AZ 85012-2501 (H)						A - All Cases		Insurance w/Doctor				
						Date of Service				Actions:		
						From						
						Thru						
Acc/Date	Ser/Date	Case	Code	Description	Org/Amt Lc	Dr	Ins/Bal	Pat/Bal I	Img	Act		
04-15-20	04-15-20	0	AWO	**ACCOUNT TURNED TO ..	-80.00							
04-15-20	04-15-20	0	AWO	**ACCOUNT TURNED TO ..	-79.00							
02-26-20	02-26-20	0	LET	Sent E-Letter ECL PA..	0.00				(C)			
02-24-20	02-24-20	0	99214	OV EST LEV 4	79.00 1	1		CY				
01-31-20	01-31-20	0	99213	OV EST LEV 3	160.00 1	1		160.00 CY				
01-30-20	01-30-20	0	99213	OV EST LEV 3	160.00 1	1		CY				
01-30-20	01-30-20	0	SLIDE	SLIDE	-80.00							
01-20-20	01-20-20	0	99213	OV EST LEV 3	160.00 1	1		Y				
01-20-20	01-20-20	0	SLIDE	SLIDE	-160.00							
12-17-19	12-17-19	0	STM	STATEMENT SENT-File	0.00							
01-28-19	01-28-19	0	STM	STATEMENT SENT-File	0.00				(ST)			

You can view the patient's statement or letter that was sent to CGM eMEDIX by clicking on the **ST** icon for a statement or the **C** icon for a collection letter. The Statement ID will display on the bottom of the statement or collection letter.

Dear Kayo,

Just a reminder that your account is past due in the amount of \$319.00. Please remit your payment today.

If you have any questions regarding these charges, please contact our billing office at 602-555-0111.

Sincerely,

Collection Manager

Statement ID: AQ1-J7X7-0T3G-54QB

## CGM WEBPRACTICE SETUP FOR PAYMENT PORTAL PAYMENTS

### CGM eMEDIX Payment Portal Integration

During the Activation process, you indicated which payment codes to use when a payment portal payment is received and the Implementation Team stored those codes in the *CGM eMEDIX Payment Portal Integration* function, located on the *System, Database Maintenance Menu, Integrations* menu.

If you need to edit those codes later, access the function and edit the Payment Codes as needed. You should NOT edit any of the CGM eMEDIX fields in the top portion of the screen as this could prevent payments from processing. Patients will not be able to make payments via the *CGM eMEDIX Payment Portal* unless all of the required fields have been completed.

CGM eMEDIX Payment Portal Integration	
CGM eMEDIX Submitter ID	<input type="text"/> ✓
CGM eMEDIX User Name	<input type="text"/> ✓
CGM eMEDIX Password	<input type="text"/> ✓
CGM eMEDIX DSN/TPID	<input type="text"/> ✓
Default Payment Code	<input type="text"/> ✓ Q
Mastercard Payment Code	<input type="text"/> Q
Visa Payment Code	<input type="text"/> Q
American Express Payment Code	<input type="text"/> Q
Discover Card Payment Code	<input type="text"/> Q

Do NOT edit these fields. ←

#### Notes

- If multiple databases have been activated, the *CGM eMEDIX Payment Portal Integration* function must be completed in each database.
- If you want to track Payment Portal payments separately from other payments in CGM webPRACTICE, you should create new Payment Codes specifically for Payment Portal.

## CGM WEBPRACTICE REPORTS FOR PAYMENT PORTAL PAYMENTS

The reports available to identify Payment Portal payments include:



- Unposted Payments Journal
- Unposted Payments - Print to Excel
- Daily Register to Excel
- Transaction Journals to Excel (Payment)

The examples provided show just a few of the printing and sorting options available.

### Unposted Payments Journal

With the *Unposted Payments Journal (Transactions > Transaction Journals > Unposted Payments Journal)*, you can print a report that lists the Payment Portal payments for electronic patient statement payments or collection payments, that have been *stored* but have not been *posted* to the patient account.

After accessing the function, select the **Print in Payment Method Order** check box so the report will provides totals for each payment method.

Unposted Payments Journal	
Print in Patient Order	<input type="checkbox"/>
Print in Payment Code Order	<input type="checkbox"/>
Print in User Code Order	<input type="checkbox"/>
Print in Date Order	<input type="checkbox"/>
Print in Location Order	<input type="checkbox"/>
Print in Resp Doctor Order	<input type="checkbox"/>
Print in Dr Assigned to Pmt Order	<input type="checkbox"/>
<b>Print in Payment Method Order</b>	<input checked="" type="checkbox"/>
Summary Only	<input type="checkbox"/>
Print From Date	07-30-2020 
Print Through Date	07-30-2020 

## Unposted Payments Journal (cont.)

All Payment Portal payments are identified by 'PP' in the **Payment Method** column in addition to listing the Payment Codes entered in the *CGM eMEDIX Payment Portal Integration* function.

Sep 23, 2020		EASTSIDE MEDICAL						Page 1	
		Unposted Payments Journal							
		Sorted by Patient							
		From 02-17-2020 Through 03-08-2020							
Acct	Patient Name	Pmt Date	Pmt Type	Pmt Method	Pmt Code	Amount	Loc	Pmt Dr	Resp Dr
26021	Anderson, Stephen	03-08-2020	ROA	PP	OLV	1145.00			1
		Total Payments for 26021 - Anderson, Stephen				1145.00*			
26131	Glover, Donald	03-08-2020	ROA	PP	OLAX	255.42			1
		Total Payments for 26131 - Glover, Donald				255.42*			
26153	Ross, Birdie	02-17-2020	ROA	PP	OLV	60.00			1
		Total Payments for 26153 - Ross, Birdie				60.00*			
26172	Paisley, Brad	02-17-2020	ROA	PP	OLMC	6.60			1
		Total Payments for 26172 - Paisley, Brad				6.60*			
26202	LINEER, MARK	02-17-2020	ROA	PP	OLV	203.46			1
		Total Payments for 26202 - LINEER, MARK				203.46*			
		Grand Total of Payments				1670.48**			
End of Report. Transactions/Journals/Unposted Payments Journal Requested by MGR and completed at 12:13PM on Sep 23 2020									



## Unposted Payments - Print to Excel

Upon accessing the *Unposted Payments* function, you can filter and print the Payment Portal payments to Excel using the **Print to Excel** Action Column button. There are multiple options to extract and filter the data, but the simplest method is shown below.

Use the **Add/Edit Filter** Action Column button in *Unposted Payments* to view only Payment Portal payments by selecting the **CGM eMEDIX Payment Portal** option for the **Source** field.

When the filtered payments display, click the **Print to Excel** Action Column button.

Unposted Payments											System Manager
											EASTSIDE MEDICAL (1)
											*** Filter Applied ***
											(Source = 'CGM eMEDIX Payment Portal')
Status	Source	Account	Patient Name	Amount	Payment Date	Payment Type	Payment Code	Pmt Method	Patient Balance		
<input type="checkbox"/>	CGM eMEDIX Payment Portal	26021	ANDERSON, STEPHEN	1145.00	03-08-2020	ROA	Online Visa (OLV)	PP	-3.04		
<input type="checkbox"/>	CGM eMEDIX Payment Portal	26131	GLOVER, DONALD	255.42	03-08-2020	ROA	Online Amex (OLAX)	PP	0.00		
<input type="checkbox"/>	CGM eMEDIX Payment Portal	26153	ROSS, BIRDIE	60.00	02-17-2020	ROA	Online Visa (OLV)	PP	0.00		
<input type="checkbox"/>	CGM eMEDIX Payment Portal	26172	PAISLEY, BRAD	6.60	02-17-2020	ROA	Online Mastercard (OLMC)	PP	0.00		
<input type="checkbox"/>	CGM eMEDIX Payment Portal	26201	WASHINGTON, GEORGE	11.12	04-23-2019	ROA	CREDIT CARD PMT (CC)	PP	-19.14		
<input type="checkbox"/>	CGM eMEDIX Payment Portal	26202	LINEER, MARK	203.46	02-17-2020	ROA	Online Visa (OLV)	PP	0.00		
<input type="checkbox"/>	CGM eMEDIX Payment Portal	26240	SHELTON, BLAKE	13.50	04-23-2019	ROA	CREDIT CARD PMT (CC)	PP	10986.15		
<input type="checkbox"/>	CGM eMEDIX Payment Portal	26272	RAISIN, MIA	32.49	04-23-2019	ROA	CREDIT CARD PMT (CC)	PP	0.00		

When you have the Excel workbook open, you can total the payment amounts or perform additional sorting or filtering.

	A	B	C	D	E	F	G	H	I	J	K
1	Status	Source	Account	Patient Name	Amount	Payment Date	Payment Type	Payment Code	Pmt Method	Patient Balance	Last Service Date
2		CGM eMEI	26305	FREEMONT, JEN	12	4/23/2019	ROA	CREDIT CARD PMT (CC)	PP	0	1/1/2017
3		CGM eMEI	26303	SMITH, LYNN	4	4/23/2019	ROA	CREDIT CARD PMT (CC)	PP	-14	2/19/2018
4		CGM eMEI	26272	RAISIN, MIA	32.49	4/23/2019	ROA	CREDIT CARD PMT (CC)	PP	0	6/11/2018
5		CGM eMEI	26240	SHELTON, BLAKE	13.5	4/23/2019	ROA	CREDIT CARD PMT (CC)	PP	11286.15	9/23/2020
6		CGM eMEI	26202	LINEER, MARK	203.46	2/17/2020	ROA	Online Visa (OLV)	PP	0	12/13/2019
7		CGM eMEI	26201	WASHINGTON, GEORGE	11.12	4/23/2019	ROA	CREDIT CARD PMT (CC)	PP	-19.14	2/4/2020
8		CGM eMEI	26172	PAISLEY, BRAD	6.6	2/17/2020	ROA	Online Mastercard (OLMC)	PP	0	11/25/2019
9		CGM eMEI	26153	ROSS, BIRDIE	60	2/17/2020	ROA	Online Visa (OLV)	PP	0	8/28/2020
10		CGM eMEI	26131	GLOVER, DONALD	255.42	3/8/2020	ROA	Online Amex (OLAX)	PP	0	7/22/2019
11		CGM eMEI	26021	ANDERSON, STEPHEN	1145	3/8/2020	ROA	Online Visa (OLV)	PP	-3.04	9/12/2019
12				<b>TOTALS:</b>	<b>1743.59</b>						
13											
14											
15	Filter Applied: Source = 'CGM eMEDIX Payment Portal'										
16	End of Report. Transactions/Unposted Payments										
17	Requested by MGR and completed at 2:30PM on Sep 23 2020										



## Daily Register to Excel

With the *Daily Register to Excel (Transactions > Transaction Journals > Daily Register to Excel)*, you can print a report which lists all the transactions posted during a specified range of dates.

### Daily Register to Excel

Description or Superbill #  Description  Superbill #

Print by Date of Service

Print from date

Print through date

Print from list

Batch Number

Default Last Batch

When you open the Excel workbook, you can sort by the payment codes (entered in the *CGM eMEDIX Payment Portal Integration* function) and total the payment portal payments.

Acct Date	Trans Date	Actual Date/Time Posted	Acct#	Patient	Guarantor	Code	Description	CGM webPAY	Per Dr	Ins Dr	Loc	Billing Group	Insurance	Charges	Adjustment	Payment	Balance
9/23/2020	3/8/2020	9/23/2020 15:50	26021	Anderson, Stephen	Anderson, Stephen	OLV	Online Visa	UN			UN	UN				-1,145.00	-1,148.04
9/23/2020	3/8/2020	9/23/2020 15:50	26131	Glover, Donald	Glover, Donald	OLAX	Online Amex	UN			UN	UN				-255.42	-255.42
9/23/2020	2/17/2020	9/23/2020 15:49	26172	Paisley, Brad	Paisley, Brad	OLMC	Online Mastercard	UN			UN	UN				-6.6	-6.6
9/23/2020	2/17/2020	9/23/2020 15:49	26153	Ross, Birdie	Ross, Birdie	OLV	Online Visa		1			1 BC				-60	240
																-1,467.02	
9/23/2020	9/23/2020	9/23/2020 13:23	26240	SHELTON, BLAKE	SHELTON, BLAKE	99214	OV EST LEV 4		1	1		1 UHC	UHC	300			13,712.41
14 End of Report. Transactions/Journals/Daily Register to Excel																	
15 Requested by MGR and completed at 3:51PM on Sep 23 2020																	

## Transaction Journals to Excel (Payment)

With the *Transaction Journals to Excel (Transactions > Transaction Journals > Transaction Journals to Excel)*, you can print a report which lists all the payments posted during a specified range of dates.

### Transaction Journals To Excel

Journal to Print    Procedure    Payment    Adjustment

### Transaction Journals To Excel

Print from date  

Print Through Date  

Batch Number  

Default Last Batch  

Print from List

When you open the Excel workbook, you can sort by the payment codes (entered in the *CGM eMEDIX Payment Portal Integration* function) and total the payment portal payments.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	23-Sep-20															
2	EASTSIDE MEDICAL															
3	Posted Payments Journal															
4	From 09-23-2020 Through 09-23-2020															
5	Batch #	User	Acct #	Guarantor Patient Id	Pmt Acct Date	Payment Date	Actual Date Posted	Actual Time	Code	Pmt Amount	Unapplied	Acct Date of Paid Transaction	Service Date of Paid Transaction	Actual Date Transaction Posted	Pt Name	
6		MGR	26172	Paisley, Brad	9/23/2020	2/17/2020	9/23/2020 03:49PM		OLMC	-6.6	-6.6					
7		MGR	26153	Ross, Birdie	9/23/2020	2/17/2020	9/23/2020 03:49PM		OLV	-60	0	8/28/2020	8/28/2020	8/28/2020	Birdie	
8		MGR	26131	Glover, Donald	9/23/2020	3/8/2020	9/23/2020 03:50PM		OLAX	-255.42	-255.42					
9		MGR	26021	Anderson, Stephen	9/23/2020	3/8/2020	9/23/2020 03:50PM		OLV	-1145	-1145					
10										-1467.02						
11																
12	End of Report. Transactions/Journals/Transaction Journals to Excel															
13	Requested by MGR and completed at 4:16PM on Sep 23 2020															



## CGM EMEDIX REPORT FOR PAYMENT PORTAL PAYMENTS

After payment portal payments have been activated for your practice, you will be able to log on to eMEDIX's website and access the *Statements > Payment Transactions* function to view a listing of all payments received via the payment portal. You will then have options to Copy, Export the payment listing to an Excel, CSV, or PDF file or Print the listing.

For detailed information on the Payment Transactions function, you can access eMEDIX's Online Help: [http://online.emedixus.com/static/index.htm#t=Statements%2FPayment Transactions.htm](http://online.emedixus.com/static/index.htm#t=Statements%2FPayment%20Transactions.htm)