



CompuGroup™
Medical

What's New in

CGM webPRACTICE™ v2021.1.0

Preliminary Release Notes

February 2, 2021

CGMwebPRACTICE™
Fully Web-Based Practice Management Suite



Table of Contents

Introduction	3
New Features and Enhancements	4
Summary of Action Required Items.....	4
Summary of Changes to Document.....	4
General Enhancements	5
Billing	5
Patient	6
Reports	7
System	10
Tables.....	10
Transactions.....	11

INTRODUCTION

This document provides an overview of new features, resolutions, and enhancements available in the release of CGM webPRACTICE v2021.1.0. Each section defines the specific feature and/or enhancement associated with the new CGM webPRACTICE release, as well as any resolved issues.

NEW FEATURES AND ENHANCEMENTS

This section is not meant to be cumulative and only contains information associated with the CGM webPRACTICE v.2021.1.0 release.

Note: You will need to complete the *****Action Required***** items (where applicable) to make sure your system functions properly with this updated version.

As with all updates, for all new menu functionality, you will need to identify which users you want to have access to the new menu functions. Then, you must activate the new menus using the *Model User Menus* function located on the *System, User Management* menu. You must also set the security level that you want on the new menus using the *Change Function Security* function located on the *System, User Management, Function Security Menu*.

Summary of Action Required Items

Page #	Function	Action
10	Import Fee Schedules	Load the updated files if applicable
10	Load the HCPCS Codes	Load the updated files if applicable
10	Import RVU Unit Values	Load the updated files if applicable

Summary of Changes to Document

Version 1 of Preliminary Release Notes to be released February 2, 2021.

Section	Function	Added/Deleted/Revised

General Enhancements

CGM webPRACTICE Update Version Numbers

Effective January 2021, the version numbers for update releases will change. The first portion of the number represents the year, the second portion is the update cycle number (there are four updates in the cycle for each year) and the third portion is the patch version number for the current release. For example, 2021.1.0.

Billing

Insurance Never Filed (*Billing > Insurance Billing Functions > Insurance Management Reports > Insurance Never Filed*)

Enhanced the report to print the **Total Charges Never Filed** at the bottom of the report.

#	Patient Name	Billing Group	Insurance	Effective	Terminated	Spl/Bill		
26506	FORMAT, BOB	CIG - CIGNA PATIENTS	CIG - CIGNA	04-01-2020		N Y		
		Case	Date	Code	Location	Amount	Balance	Batch
		0	03-31-20	10121	GSI	392.48	392.48	
Total Charges Never Filed >						392.48**		

12-30-2020 EASTSIDE MEDICAL Insurance Never Filed Excludes Patients without Insurance From 01-01-2020 Through 12-30-2020 Page 1

End of Report. Billing/Insurance/Reports/Never Filed
Requested by MGR and completed at 11:10AM on Dec 30 2020

Review/Send Electronic Statements (*Billing > Review/Send Electronic Statements*)

Resolved the following issue that would occur when an empty statement file was created. When the User accessed the *Review/Send Electronic Statements* function, the message "*The statement file is empty and will not be loaded.*" would display and the User would be sent back to the menus when they clicked **OK**. Each time the *Review/Send Electronic Statements* was accessed in the future, the same message would display and the User would be sent to the menus until a new statement was created that actually contained patient statements. A change has been made so that after the User clicks **OK** on the message, it clears that message out and allows the User to access the *Review/Send* screen, so they can access the **History** Action Column function.

Patient

Case Information (Patient > Change Patient Data > Case Information & Patient > Patient Registration > Case Information)

Enhanced the **Insurance Primary**, **Secondary** and **Tertiary** fields to display the **Insurance Policy Number** to make it easier to select the correct carrier. In addition, you will no longer be able to change the **Carrier Type** field on the patient's insurance policy if that insurance carrier is tied to a Case.

Insurance Primary	*STATE COMP FUND (SCF), Policy #1a1a1a1a
Secondary	*GHI (GHI), Policy #2b2b2b2b
Tertiary	*STATE FARM (SF), Policy #3c3c3c3c

Reports

Corporate Reports (Reports > Corporate Reports)

Made the following enhancements to the Database Selection screen for all corporate reports:

- An **All Databases** option is now available.
- When a User selects databases, the next time they access the Database Selection screen, their previous selections are defaulted.
- A User can only select databases that they have access to in the *User Database Access* function (*System > User Management > User Database Access*). When **All Databases** is selected, only the databases that the User has access to are included for the report.

Corporate Aged A/R for Ins by Billing Group	
Select Database(s)	
<input checked="" type="checkbox"/>	All Databases
<input type="checkbox"/>	Eastside Medical - 0002 (1)
<input type="checkbox"/>	Family Practice-0002 (2)
<input type="checkbox"/>	Linking Practice-0002 (3)
<input type="checkbox"/>	HOSPITAL (4)
<input type="checkbox"/>	PAIN MANAGEMENT (5)
<input type="checkbox"/>	LOCAL DEV DB=6 (6)
<input type="checkbox"/>	DB=7 (7)
<input type="checkbox"/>	Analytics Testing Database (9)
<input type="checkbox"/>	DIGICHART TRAINING DB (10)
<input type="checkbox"/>	Printing NetPractice PM (12)
<input type="checkbox"/>	DB 13 TEST (13)
<input type="checkbox"/>	Lisa's Test System (22)
<input type="checkbox"/>	SHARED WITH DB=1 (30)
<input type="checkbox"/>	Localdev Database 1 (33)
<input type="checkbox"/>	PEDIATRIX COLL (92)

Corporate Reports (Reports > Corporate Reports)

The following reports were renamed:

- *Global Adjustment Journal* changed to *Corporate Adjustment Journal*
- *Global Payment Journal* changed to *Corporate Payment Journal*
- *Global Journals to Excel* changed to *Corporate Transaction Journals to Excel*

Corporate CGM webVERIFY™ Usage Report to Excel (Reports > Corporate Reports > CGM webVERIFY Reports > Corporate CGM webVERIFY Usage Report to Excel) ***New Functionality***

This report provides the same data available in the *CGM webVERIFY Usage Report*, but was designed to print to Excel for multiple databases, so you can perform additional filtering and sorting as needed.

CGM webVERIFY Usage Report (Reports > Insurance Related Reports > CGM webVERIFY Reports > CGM webVERIFY Usage Report)

Enhanced the report so you can print it to *Microsoft Excel via MyReports*.

Reports (cont.)

Corporate Reports - All reports (Reports > Corporate Reports)

Enhanced every corporate report to prevent possible errors when multiple databases are selected but not all of the required Tables are shared among databases.

Notes: It is required for tables to be shared in order for the reports to function accurately. If tables are not shared:

- If the report encounters a table code for one of the selected databases that does not exist in the Table in the database you are currently logged into, 'undef' will print on the report - along with the totals for that 'undef' code. This alerts you that you may need to go in and manually update your database(s) with these missing codes.

		Monthly Adjustments				Year to Date Adjustments							
		Current	Previous	Deviation		Current	Previous	Deviation					
		No	Year	No	Year	Dollars	Percent	No	Year	No	Year	Dollars	Percent
BCBS PATIENTS TEST	3	<26.00>				<26.00>	100.0%	3	<26.00>	2	<26.00>	<26.00>	0.0%
CASH PATIENTS						---				0			---
CONVERSION						---		6	<46.80>			<46.80>	100.0%
Renee TEST						---				1	<2.00>	2.00	-100.0%
undef SL						---				1	<1.00>	1.00	-100.0%
Grand Total	3	<26.00>	0			<26.00>	100.0%	9	<72.80>	4	<29.00>	<43.80>	151.0%

- The report sorting option is only going to provide table items that exist in the database that you are logged into when printing the report.
- If any additional sorting options are selected within the lead-in screen, the report is only going to provide results for the databases that actually contain the selected code(s) in their tables. Keep in mind that the table code could be different for one database vs another database.
- If the additional sorting options within the lead-in screen are left blank, the report will provide results for all codes across all databases, but if a table code exists in more than one database it will provide the name of the table item for the first database it finds with that table code. Keep in mind that the table code could be different for one database vs another database, but the different names for the table code will not be present in the report.

Reports (cont.)

Corporate Transaction Journals to Excel (*Reports > Corporate Reports*):

The following enhancements were made:

- Added a **Procedures** option, which will print the *Corporate Procedure Journal to Excel* and includes **Ins Carrier Code** and **Ins Carrier Name** columns, which reflect the Insurance Carrier the charge was filed to. If the charge has not been filed to insurance yet, they will reflect the patient's primary insurance.
- For the **Payments** and **Adjustments** options, added **Ins Carrier Code** and **Ins Carrier Name** columns, which reflect the Insurance Carrier entered when the payment or adjustment was posted.
- Added a Database Selection screen to each printing option. Previously, all databases were automatically included.

User Productivity Report to Excel (*Reports > User Productivity Report to Excel*)

Changed the following column headings:

- **Pts Appts Scheduled** to **Pt Appts Scheduled**
- **# of Co-Pay Pmts** to **# of Co-Pay Pmts Posted**
- **# of Other Pmts** to **# of Other Pmts Posted**

Added the following columns to show how many complete 'visits' a User posted. If you post all of the encounter charges using superbills, these two columns should have the same totals because each superbill should also be a complete encounter:

- **# of Superbills Posted**
- **# of Encounters Posted**

System

School Integration (*System>Database Maintenance > Integrations> School Integrations>School Integration*)

*****School Clients Only*****

Added a **Prevent Editing of Student Identifier** check box, so you can control whether Users can edit the **Student Identifier** field or not, on existing patient accounts. Typically, this field is populated when patient accounts are created due to an interface but if you have to manually register a patient account, you will be able to add the **Student Identifier** field.

Tables

Import Fee Schedules (*Tables > Fee Schedule Tables > Import Fee Schedules*) *****Action Required*****

The Centers for Medicare and Medicaid Services (CMS) have released the following Fee Schedules:

- 2021 Medicare Physician Fee Schedule, effective January 1, 2021
- 2021 Medicare Clinical Laboratory Fee Schedule, effective January 1, 2021
- 2021 Medicare DME Fee Schedules; Prosthetics/Orthotics and Supplies (DMEPOS), effective January 1, 2021

The updated files are available for import by selecting 2021 in the **Fee Schedule Year** list and the applicable file name in the **Fee Schedule File** list.

Import RVU Unit Values (*Tables > Relative Value Schedule Table > Import RVU Unit Values*) *****Action Required*****

The Centers for Medicare and Medicaid Services (CMS) have updated the 2021 Medicare Relative Value Unit files (RVUs) effective January 1, 2021. To receive the updated codes you must load the **2021** file.

Load the HCPCS Codes (*Tables > Procedure Code Table > Load the HCPCS Codes*) *****Action Required*****

Updates to the 2021 HCPCS data files, effective January 1, 2021 are available. To receive the updated codes you must load the 2021 file.

Transactions

Unposted Procedures (Transactions > Unposted Procedures)

Pre-Treatment (Transactions -> Pre-Treatment)

Added a new **Print to Excel** Action Column button, which will print the contents of the screen to Excel, as it is currently sorted/filtered.

Unposted Procedures				
New Patients (1) Change Batch Print Print to Excel Add/Edit Filter Remove Filter Journal Refresh		There are (1) Un-registered New Patients with (1) charge		
<input type="checkbox"/>	Sta	Source	Account	Patient Name
<input type="checkbox"/>	Ⓢ		23936	ANDERSON, ANDY <i>Hospital Note: 031317 Hospital Note from webMOBILE. One or more Authorization attachments may be required. Procedure 36415 has already been posted for this Patient with Date of Service 10-13-2020 and Location 1.</i>
<input type="checkbox"/>	Ⓢ	E-Superbill	25625	BATES, JESSICA <i>Diagnosis/CPT cross-linking table error 80061 for Diagnosis W22.02XD.</i>

Corporate Unposted Procedures (Transactions -> Corporate Unposted Procedures)

Added the following to the Summary screen:

1. **Print to Excel** Action Column button that will print the contents of the screen to Excel as it is currently sorted.
2. The combined **Total Unposted Procedures \$** for all databases at the top of the screen.
3. A **Total Amount** column, which shows the total for each database.

Corporate Unposted Procedures				
Print to Excel		Total Unposted Procedures: \$40,756.65		Total Amount
Database	Name	# Unposted Procedures		Total Amount
1	EASTSIDE MEDICAL	32		4999.05
2	EASTSIDE PEDIATRICS-FAMILY DB	2		294.00
3	Community Health Clinic	0		0.00
4	HOSPITAL	7		24306.60
5	PAIN MANAGEMENT	0		0.00
6	Northside Med (Medi-Ed Test-PROD)	32		1185.00
7	MediEd Test (QA)	289		9972.00

Transaction Journals to Excel - Procedures (Transactions > Transaction Journals > Transaction Journals to Excel)

Made the following enhancement:

- If you use expanded Procedure Entry to store a different location, referring doctor, or performing doctor code for each procedure entered, these codes will now reflect properly for each procedure on the report.

Transactions (cont.)

Transaction Journals to Excel (*Reports > Transaction Journals > Transaction Journals to Excel*)

The following enhancements were made:

- **Procedures** option: Added an **Ins Carrier Name** column and changed the **Insurance Carrier** column name to **Ins Carrier Code**. These will reflect the Insurance Carrier the charge was filed to and if the charge has not been filed yet, they will reflect the patient's primary insurance. Previously, the Insurance Carrier column would always reflect the patient's primary insurance.
- **Payments** and **Adjustments** options: Added **Ins Carrier Code** and **Ins Carrier Name** columns, which reflect the Insurance Carrier entered when the payment or adjustment was posted.

Daily Register to Excel (*Transactions > Transaction Journals > Daily Register to Excel*)

Resolved an issue that would prevent the Superbill Number from printing if you selected to print the report by Superbill #. Now, the report column will print '**Superbill #**' instead of '**Description**' and print the applicable Superbill numbers.

Daily Register to Excel (*Transactions > Transaction Journals > Daily Register to Excel*)

Made the following enhancements:

- Changed the name of the **Print in Doctor Order** field to **Print in Per Dr Order**, so it is clear this will sort by the performing doctor.
- Changed the **Print by Service Date** check box to options for **Service Date** or **Accounting Date**
- The **Dr** column was broken down to two separate columns for **Per DR** and **Ins DR**.
- Added a separate **Ref DR** column, which will print the **Referring Doctor Code** for the procedure.
- If you use expanded Procedure Entry to store a different location, referring doctor, or performing doctor code for each procedure entered, these codes will now reflect for each procedure on the report.
- The **Trans Date** column was renamed **Service Date**.
- The **Acct Date** will always print in the first column and the **Service Date** in the second column, regardless if you are printing the report by 'Service Date' or 'Acct Date'. The appropriate column will be sorted correctly based on your selection.
- The options to print the **Procedure Description** or the **Superbill #** when the **Print Transaction Detail** check box is selected, has been removed. Both the Procedure Description and the Superbill # will automatically print.

Transactions (cont.)

Procedure Journal (*Transactions > Transaction Journals > Procedure Journal*)

Made the following enhancements:

- Changed the name of the **Print in Doctor Order** field to **Print in Per Doctor Order**, so it is clear this will sort by the performing doctor.
- The **Referring Doctor Code** will print in a separate **Ref DR** column, instead of printing on a separate line below the procedure.
- The **P/I DR** column was broken down to two separate columns for **Per DR** and **Ins DR**.
- If you use expanded Procedure Entry to store a different location, referring doctor, or performing doctor code for each procedure entered, these codes will now reflect properly for each procedure on the report.

Daily Register (*Transactions > Transaction Journals > Daily Register*)

Made the following enhancements:

- Changed the name of the **Print in Doctor Order** field to **Print in Per Dr Order**, so it is clear this will sort by the performing doctor.
- The **Dr** column was broken down to two separate columns for **Per DR** and **Ins DR**.
- Added a separate **Ref DR** column, which will print the **Referring Doctor Code** for the procedure.
- If you use expanded Procedure Entry to store a different location, referring doctor, or performing doctor code for each procedure entered, these codes will now reflect for each procedure on the report.
- The **Trans Date** column was renamed **Service Date**.
- Changed the **Print by Service Date** check box to options for Service Date or Accounting Date
- The **Acct Date** will always print in the first column and the **Service Date** in the second column, regardless if you are printing the report by 'Service Date' or 'Acct Date'. The appropriate column will be sorted correctly based on your selection.

Transaction Detail to Excel (*Transactions > Transaction Journals > Transaction Detail to Excel*)

Added the following data elements to the report:

- **Proc-User Code** column - Prints the User code of the employee that posted the procedure.
- **Proc-Actual Date Posted** - Prints the actual date the procedure was posted.

Transactions (cont.)

Transaction Detail to Excel (*Transactions > Transaction Journals > Transaction Detail to Excel*)

Made the following enhancements:

- Added a **Proc-Ref** data element. This will print the Referral Source stored for the encounter or if you use expanded Procedure Entry to store a different referring doctor, it will reflect that code.
- If you use expanded Procedure Entry to store a different location or performing doctor code for each procedure entered, these codes will now reflect properly for the **Proc-Per Dr** and **Proc-Loc** data elements for each procedure on the report.

Import and Post ERA Files (*Transactions > Electronic Remittance Advice (ERA) > Import and Post ERA Files*)

Enhanced the function so that duplicate ERA files are automatically archived during the import process.