What's New in

CGM webPRACTICE™ v2021.2.0

Preliminary Release Notes

May 11, 2021

CGMwebPRACTICE™
Fully Web-Based Practice Management Suite

Table of Contents

INTRODUCTION

This document provides an overview of new features, resolutions, and enhancements available in the release of CGM webPRACTICE v2021.2.0. 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.2021.2.0 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
21	Import Fee Schedules	Load the updated files if applicable
21	Load the HCPCS Codes	Load the updated files if applicable
21	Import RVU Unit Values	Load the updated files if applicable

Summary of Changes to Document

Version 1 of Preliminary Release Notes to be released May 11, 2021.

Section	Function	Added/Deleted/Revised

Billing

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

Made the following enhancements to the summary screen, to provide additional information and for practices that have CGM webPAY™; identify accounts that have a credit card on file.

- Added a **CC Status** column - ***CGM webPAY Clients Only*** The following credit card statuses will display a:
  - Green Dot if the account has a valid credit card on file.
  - Yellow Dot if the account has a credit card on file that is going to expire soon (based on **Days to Warn for CC on File Expiring** setting in the *CGM webPAY Integration* function).
  - Red Dot if the account has a credit card on file that is expired.
  - White dot with line if the account does not have a credit card on file.
  - **Note**: The **CC Status** will only appear in databases with CGM webPAY enabled and only for the current statement file (not historical files).
- Added an **Acct Balance** column - Displays the account balance at the time of the statement.
- Renamed the **Balance** column to **Pt Balance** - Displays the Patient Balance at the time of the statement. Prior to this change, the Balance column was actually displaying the patient balance, so the contents of this column have not changed, only the name.
- Added a **Last Stmt** column - Displays the date of the last statement for this account.
- **Last Pt Pmt Date** column - Displays the date of the last patient payment on this account at the time of the statement.
- Added a **Last Pt Pmt Amt** column - Displays the amount of the last patient payment on the account at the time of the <u>last</u> statement.
- Added a **Last DOS** column - Displays the last date of service at the time of the statement.
- Added a **Print to Excel** Action Column button, which will print the contents of the summary screen to Excel.

For additional information, see the *CGM webPAY Integration* entry under the *System* section of these release notes.

Review/Send Electronic Statements

System Manager
EASTSIDE MEDICAL (1)

Approve	File Name: 20210304.1S	Created on: 03-04-2021	
History	File Status: Not Approved	Total Stmts (Pages): 15	
Transfer	Last Pat Viewed: 26356	Total Stmts (1st page): 15	
View All		Total Addtnl Pages: 0	
Print to Excel		Total Stmt File Balance: 5,401.19	

CC Status	Acct #	Patient	Guarantor	Dr	Bill Grp	Acct Balance	Pt Balance	Last Stmt	Last Pt Pmt Date	Last Pt Pmt Amt	Last DOS
🟢	26079	Cullen, Edward	Cullen, Edward	1	COL	25.00	25.00	02-19-2021	05-08-2014	40.00	02-12-2021
🟢	26202	LINEER, MARK	LINEER, MARK	1	BC	329.25	329.25	02-19-2021	02-01-2021	0.75	02-01-2021
🟢	26362	Carter, Jimmy	Carter, Jimmy	1	MED	200.00	200.00	02-19-2021	01-21-2021	100.00	07-13-2020
🟢	26008.1	Lowe, George	Lowe, George	1	CNV	229.00	97.00	01-28-2019	03-02-2021	50.00	03-02-2021
🔴	26239	Lambert, MIA	Lambert, MIA	1	BC	404.00	155.00	02-19-2021	01-29-2020	25.00	01-29-2020
🔴	26241	Hutchison, Scott	Hutchison, Scott	1	COL	-52.00	14.00	02-19-2021	05-07-2014	130.00	04-05-2019
🔴	26328	Garner, Jennifer	Garner, Jennifer	1	AET	1,026.50	174.10	02-19-2021	12-04-2018	10.00	06-04-2018
🔴	26329	Affleck, Violet	Affleck, Violet	1	AET	-126.26	100.00	02-19-2021		0.00	07-01-2020
🔴	26356	Ford, Gerald	Ford, Gerald	1	BC	171.49	171.49	02-19-2021	10-24-2019	34.00	07-27-2019
⊘	25282	GIDCUMB, JULIE	GIDCUMB, JULIE	TOR	COL	0.00	1,000.00	02-19-2021	09-12-2006	30.00	09-19-2008
⊘	25717	LYALL, MARTHA E	LYALL, MARTHA E	1	COL	1,249.00	429.00	02-19-2021	03-20-2020	47.00	01-12-2021
⊘	26088	Ridgell, Starr	Ridgell, Starr	1	COL	25.00	25.00	02-19-2021		0.00	02-12-2021
⊘	26136	Cole, David T	Cole, David T	1	BC	25.00	25.00	02-19-2021		0.00	02-12-2021
⊘	26258	Adams, John	Adams, James	1	BC	2,802.00	2,502.00	02-19-2021	10-12-2015	15.00	09-25-2020
⊘	26521	ABREU, DALDI	ABREU, DALDI	1	MED	154.35	154.35	02-19-2021		0.00	12-01-2020

Billing (cont.)

Insurance Filing Report *(Billing > Insurance Billing Functions > Insurance Filing Report)*

Added *Microsoft Excel via MyReports* option in the Printers selection window.

In addition to the standard data provided, the Excel version includes separate columns for:

- **Printed** - Prints **Yes** or **No** to indicate if the insurance claim was printed or not.
- **Ins Code** - The Insurance Carrier Code for the claim.
- **Ins Description** - The Insurance Carrier Description for the claim.
- **Ins Form** - The Insurance Form Type stored for the Insurance Carrier Code.
- **Function** - Indicates the function used to create the claim.
    - **C** = Create Insurance Print File function
    - **P** = Procedure Entry function
    - **S** = Secondary Filing generated by response from primary carrier
    - **T** = Tertiary Filing generated by response from secondary carrier
    - **A** = Delinquent Insurance File Create (Automatic refile)
    - **E** = Electronic submission (moved to paper)
    - **D** = Insurance on Demand function
    - **R** = Refiled
    - **JP** = Transfer Journal to Current File or a Transfer Journal to Paper Claims
    - **F** = File a Claim - When the File or Demand action is performed from within Encounter view. **Note**: This code is recorded for a Demand action only when the claim has not been previously filed.
    - **JP** = Journal to Paper - When the Transfer Journal to Paper Claims function is performed.
    - **X** = Automatic Refile - When paper claims are created using the Create Delinquent Insurance function.
    - **H** = On Hold - When a date is entered in the Claim Hold field in Procedure Entry.
    - **XP** = Exceptions to Paper - When an electronic exception is moved to the Paper File.
- **Claim Type** - Prints Primary, Secondary or Tertiary

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	22-Apr-21													
2	EASTSIDE MEDICAL													
3	Insurance Filing Report													
4	From Carrier First Through Carrier Last													
5	For Printed and Non-Printed Claims													
6														
7	Printed	Ins Code	Ins Description	Ins Form	Function	Claim Type	Acct #	Patient	Acct Date	Serv Date	Performing Dr	Insurance Dr	Location	Superbill #
8	No	AET	AETNA	F	C	P	25444.6	Fatt, Flopsy	1/28/2021	1/28/2021	1	1	1	
9	No	TRV	TRAVELERS WORK COMP	G	R	P	25465.1	Dean, Chane	1/17/2021	1/17/2021	1	1	UB1	
10	No	TRV	TRAVELERS WORK COMP	G	R	P	25465.1	Dean, Chane	1/17/2021	1/17/2021	1	1	UB1	
11	No	UHC	United HealthCare	G	R	P	25442.1	ROSE , RED	1/17/2021	1/17/2021	1	1	UB1	
12	No	UHC	United HealthCare	G	R	P	25442.1	ROSE , RED	1/17/2021	1/17/2021	1	1	UB1	
13	No	UHC1	UNITED HEALTH CARE	F	S	S	25462.1	Swan, Bella	1/28/2021	1/28/2021	1	1	1	

Note: Totals for columns are not provided on the Excel report, so that they won't interfere with any additional sorting or filtering you may perform.

Billing (cont.)

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

Enhanced the report to *Print to Excel via MyReports* and changed the report format to print both the Accounting Date (**Acct Date**) and the Date of Service (**DOS**).

```
                                  Insurance Never Filed
                              Excludes Patients without Insurance
                                From 01-01-2020 Through 02-19-2021

#       Patient Name      Billing Group       Insurance                        Effective   Terminated  Spl/Bill
---------------------------------------------------------------------------------------------------------------


26521 -                   MED - MEDICARE PATIENTS MED - MEDICARE                01-01-2021               N    Y
                                              APIPA - APIPA/UHC COMMUNITY PLAN AHCCCS   01-01-2019        N    Y

                                  Case Acct Date  DOS        Code    Location  Amount   Balance  Batch
                                  -------------------------------------------------------------------
                                       12-01-20   12-01-20   99203    1         154.35   154.35

                                  Total Charges Never Filed >    154.35**
```

Collections

Maintain Collection Status Codes *(Collections > Patient Collections > Collection Tables > Collection Status Table > Maintain Collection Status Codes)*
   Removed the **Path Name if Work Document** field, since it is no longer used.

Work Accounts (*Collections > Patient Collections > Work Accounts*)
   Added a **Print to Excel** Action Column button.

Print Collection Roster (*Collections > Patient Collections > Print Collection Roster*)
   Enhanced the *Microsoft Excel via MyReports* function to include a 'Worked' column with 'Y' or 'N' to indicate if the account has been worked or not, if you select to print for 'All' accounts.

Print Roster Summary (*Collections > Patient Collections > Print Roster Summary*)
   Enhanced the report so you can print it to *Microsoft Excel via MyReports.*

Print Dead-End Report (*Collections > Patient Collections > Print Dead-End Report*)
   Enhanced the report so you can print it to *Microsoft Excel via MyReports.*

Print Collection Letter Statistics (*Collections > Patient Collections > Print Collection Letter Statistics*)
   Enhanced the report so you can print it to *Microsoft Excel via MyReports.*

Turn Over History Report (*Collections > Patient Collections > Turn Over Functions > Turn Over History Report*)
   Enhanced the report so you can print it to *Microsoft Excel via MyReports.*

Print Collection Roster (*Collections > Insurance Collections > Print Collection Roster*)
   Enhanced the report so you can print it to *Microsoft Excel via MyReports* and added a 'Worked' column that will print with 'Y' or 'N' to indicate if the account has been worked or not, *i*f you select to print for 'All' accounts. In the standard printed report, changed the **Insurance Balance** heading to **Acct Bal** and changed **Delinquent** to **Delinq Ins Bal** to make it clear which balance is printed. When printed to Excel the column headings will print **Acct Balance** and **Delinquent Ins Balance**.
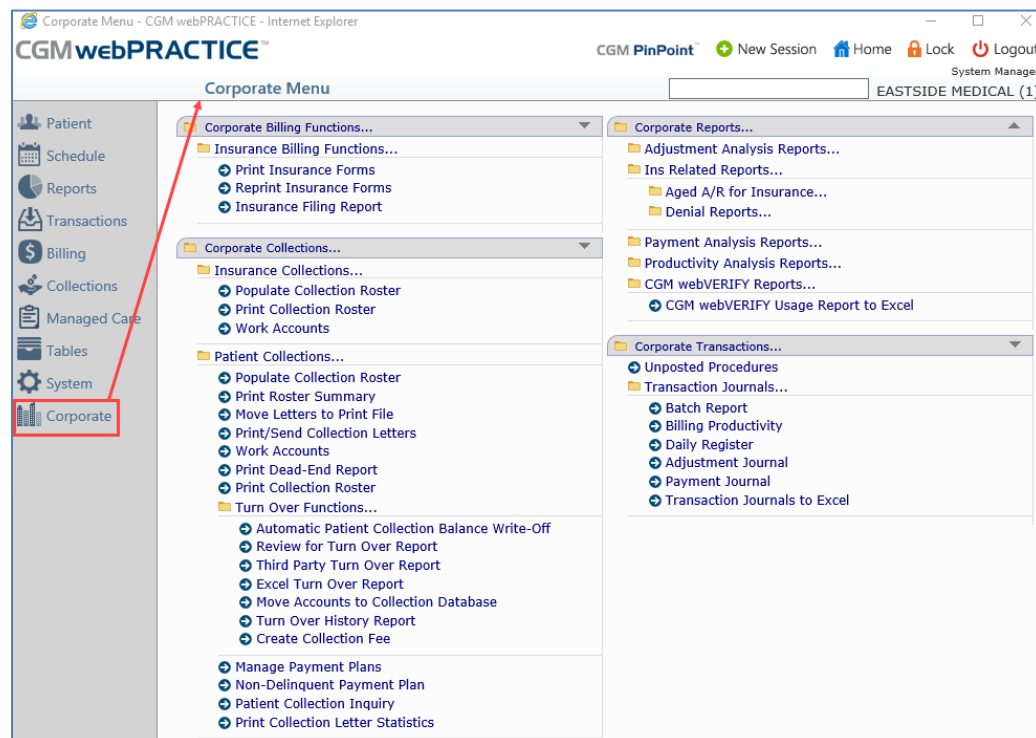
Corporate

All Corporate Functions

In the 2021.1.0 update, we had removed collection databases from the database selection screen, but that change has been reverted since some clients do still need access to them.

> **Note**: If you accessed any of the corporate functions and selected databases in the Database Selection screen after the installation of the 2021.1.0 update, those databases were set as your 'default' selections and were defaulted the next time you accessed the screen. Your default selections will remain intact and this modification will not affect you.

Corporate Functions

Added a new **Corporate** main menu to make it easier to access every corporate report and function. Every function that was previously on the *Reports > Corporate Reports* menu was moved to the new menu and placed on the appropriate sub-menu. New menu functions were also added for Corporate Insurance Collections and Corporate Patient Collections.

Corporate (cont.)

General notes for Corporate functionality:

- *User Database Access* function must be set up for each User (*System > User Management > User Database Access*)

It is required that 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.

```
Jan 13, 2021                            Testing Database                                          Page 6
                                     Adjustment Analysis Report
                                 For Month of December, 2020 by Billing Group
                     Corporate Totals for Database(s): 1, 2, 3, 4, 5, 6, 7, 9, 10, 11, 12, 22, 33, 92, 102, 212
                                              Summary Page


                 |------------- 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.

Corporate (cont.)

Due to the quantity of enhancements made to the Billing, Insurance Collections and Patient Collections functions to provide Corporate functionality, the following definitions have been provided to prevent repetition in the release notes:

Definition of Corporate - Report
Includes a Database selection screen.
The report footer will print **Requested by** (*User*) and **from** (*Database Name (DB#).*
Print Here functionality
- Will print a separate report for each database you selected.
- The report heading will contain the Database Name and Number.

Microsoft Excel via MyReports option in the Printers selection window or Print to Excel.
- The report heading will print the Database Numbers you selected.
- Includes columns for the Database (number) and Database Name.

Definition of Corporate Function
Includes a Database selection screen.
Includes a Database Summary screen that lists all of the selected databases, so you can easily work each database from a single access point.
Database Summary screen includes a **Print to Excel** Action Column button. The Excel report includes a Database (number) and Database Name column.
When possible, the Database Summary screen provides a column(s) that lists the total(s), so you can easily keep track of the databases you have worked. To access a database, click anywhere in a Database row. Follow the standard process and when you are done, you will automatically return to the Corporate Database Summary screen.

Corporate Billing Functions

Insurance Filing Report (*Corporate > Corporate Billing Functions > Insurance Billing Functions > Insurance Filing Report*)
Turned into a corporate report - see *Definition of Corporate Report*
For additional information, see the *Insurance Filing Report* entry under the *Billing* section of these release notes.

Print and Reprint Insurance Forms (*Corporate > Corporate Billing Functions > Insurance Billing Functions > Print/Reprint Insurance Forms*)
Turned into a corporate function - see *Definition of Corporate Function*
The Database Summary screen provides columns that list the quantity of claims that are **Not Printed** and **Printed.**

Corporate (cont.)
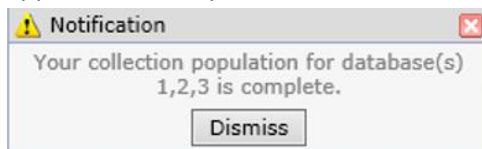
Corporate Patient Collections

- *The following Tables must be shared for Corporate Patient Collections*
  - Collection Status Table must be Shared
  - Collection Agency Table must be Shared
  - Same Collection Letters (names) must be used in all Corporate Databases

Populate Collection Roster (*Corporate > Corporate Collections > Patient Collections > Populate Collection Roster*)

Turned into a corporate function, so you can populate the patient collection roster for multiple databases at the same time. Upon accessing the function, the corporate database selection screen displays. After selecting the databases that you want to populate, they will start populating in the background and display the status on the screen.

After all of the selected databases have started populating, you can click **Proceed**. A notification message appears in the top left of the screen when the patient collection roster has populated for all databases.

Print Collection Roster (*Corporate > Corporate Collections > Patient Collections > Print Collection Roster*)

Turned into a corporate report - see *Definition of Corporate Report*
For additional information, see the *Print Collection Roster* entry under the *Patient Collections* section of these release notes.

Print Roster Summary (*Corporate > Corporate Collections > Patient Collections > Print Roster Summary*)

Turned into a corporate report - see *Definition of Corporate Report*

Corporate Patient Collections (cont.)

Work Accounts (*Corporate > Corporate Collections > Patient Collections > Work Accounts*)

Turned into a corporate function- see *Definition of Corporate Function*

The Database Summary screen provides:

- Total number of accounts
- Number of accounts worked
- Number of accounts unworked
- Total patient collection balance for each database
- Total Patient Collection Balance for all the selected databases at the top of the screen

	Corporate - Patient Collections - Work Accounts				System Manager EASTSIDE MEDICAL (1)
Print to Excel	Total Patient Collection Balance: $20,213.46				
	Database ▼	Name	# Accounts	# Worked	# Unworked	Total Balance
	1	EASTSIDE MEDICAL	15	14	1	13,704.48
	2	EASTSIDE PEDIATRICS-FAMILY DB	10	7	3	3,335.64
	3	Community Health Clinic	25	3	22	3,173.34

After you access a database from the Corporate Database Summary screen to work the accounts, if you select the **Print to Excel** Action Column button, the Excel report will include a Database (number) and Database Name column.

Manage Payment Plans (*Corporate > Corporate Collections > Patient Collections > Manage Payment Plans*)

Turned into a corporate function- see *Definition of Corporate Function*

	Corporate - Patient Collections - Manage Payment Plans	
Print to Excel		Total Payment Plans: 7
	Database ▼ Name	# Payment Plans
	1 Eastside Medical - 0002	7
	2 Family Practice-0002	0
	3 Linking Practice-0002	0

After you access a database from the Corporate Database Summary screen to work the payment plans, if you select **Print** and *Microsoft Excel via MyReports*, the Excel report will include a Database (number) and Database Name column.

Print Dead-End Report (*Corporate > Corporate Collections > Patient Collections > Print Dead-End Report*)

Turned into a corporate report - see *Definition of Corporate Report*

The **From/Thru Patient** fields are inactive because 'corporate' functionality includes every patient account.

Corporate Patient Collections (cont.)

Automatic Patient Collection Balance Write-Off (*Corporate > Corporate Collections > Patient Collections > Turn Over Functions > Automatic Patient Collection Balance Write-Off*)

Turned into a corporate function- see *Definition of Corporate Function*

	Database	Name	Acct Date of Last Write-Off		System Manager EASTSIDE MEDICAL (1)
Print to Excel	1	EASTSIDE MEDICAL	06-01-2020		
	2	EASTSIDE PEDIATRICS-FAMILY DB	05-04-2021		
	3	Community Health Clinic			

Corporate - Patient Collections - Automatic Patient Collection Balance Write-Off

Create Collection Fee (*Corporate > Corporate Collections > Patient Collections > Turn Over Functions > Create Collection Fee*)

Turned into a corporate function- see *Definition of Corporate Function*

	Database	Name	Acct Date of Last Collection Fee	System Manager EASTSIDE MEDICAL (1)
Print to Excel	1	EASTSIDE MEDICAL	05-04-2021	
	2	EASTSIDE PEDIATRICS-FAMILY DB	05-04-2021	
	3	Community Health Clinic		

Corporate - Patient Collections - Create Collection Fee

Move Letters to Print File (*Corporate > Corporate Collections > Patient Collections > Move Letters to Print File*)

Turned into a corporate function- see *Definition of Corporate Function*

Corporate - Patient Collections - Move Letters to Print File — System Manager EASTSIDE MEDICAL (1)

Total Not Printed/Sent: 1, Total Printed/Sent: 3

	Database	Name	Not Printed/Sent	Printed/Sent	
Print to Excel	1	EASTSIDE MEDICAL	1	0	
	2	EASTSIDE PEDIATRICS-FAMILY DB	0	2	
	3	Community Health Clinic	0	1	

Print/Send Collection Letters (*Corporate > Corporate Collections > Patient Collections > Print/Send Collection Letters*)

Turned into a corporate function- see *Definition of Corporate Function*

Corporate - Patient Collections - Print/Send Collection Letters — System Manager EASTSIDE MEDICAL (1)

Total Not Printed/Sent: 1, Total Printed/Sent: 3

	Database	Name	Not Printed/Sent	Printed/Sent	
Print to Excel	1	EASTSIDE MEDICAL	1	0	
	2	EASTSIDE PEDIATRICS-FAMILY DB	0	2	
	3	Community Health Clinic	0	1	

Corporate Patient Collections (cont.)

Move Accounts to Collection Database (*Corporate > Corporate Collections > Patient Collections > Turn Over Functions > Move Accounts to Collection Database*)

   Turned into a corporate function- see *Definition of Corporate Function*

Print Collection Letter Statistics (*Corporate > Corporate Collections > Patient Collections > Print Collection Letter Statistics*)

   Turned into a corporate report - see *Definition of Corporate Report.*

Turn Over History Report (*Corporate > Corporate Collections > Patient Collections > Turn Over Functions > Turn Over History Report*)

   Turned into a corporate report - see *Definition of Corporate Report.*

Review for Turn Over Report (*Corporate > Corporate Collections > Patient Collections > Turn Over Functions > Review for Turn Over Report*)

   Turned into a corporate report - see *Definition of Corporate Report.*

Third Party Turn Over Report (*Corporate > Corporate Collections > Patient Collections > Turn Over Functions > Third Party Turn Over Report*)

   Turned into a corporate report - see *Definition of Corporate Report.*

Corporate Insurance Collections

Populate Collection Roster (*Corporate > Corporate Collections > Insurance Collections > Populate Collection Roster*)

Turned into a corporate function, so you can populate the insurance collection roster for multiple databases at the same time. Upon accessing the function, the corporate database selection screen displays. After selecting the databases that you want to populate, they will start populating in the background and display the status on the screen.

Populate Collection Roster

Database 1 : Populating Insurance Collection Roster in background...
Database 2 : Populating Insurance Collection Roster in background...
Database 3 : Integration must first be set up.

After all of the selected databases have started populating, you can click **Proceed**. A notification message appears in the top left of the screen when the insurance collection roster has populated for all databases.
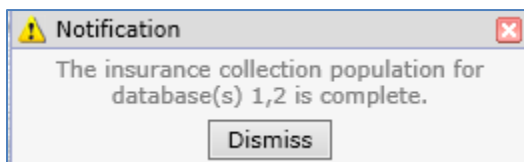
⚠ Notification ✖

The insurance collection population for database(s) 1,2 is complete.

Dismiss

Work Accounts (*Corporate > Corporate Collections > Insurance Collections > Work Accounts*)

Turned into a corporate function- see *Definition of Corporate Function*

The Database Summary screen provides:

- Total number of procedures
- Number of procedures worked
- Number of procedures unworked
- Total insurance collection balance for each database
- Total Insurance Balance for all the selected databases at the top of the screen

	Corporate - Insurance Collections - Work Accounts				System Manager EASTSIDE MEDICAL (1)
Print to Excel	Total Insurance Balance: $145,365.71				
	Database ▼ Name	# Procedures	# Worked	# Unworked	Total Balance
	1 EASTSIDE MEDICAL	196	2	194	99,426.11
	2 EASTSIDE PEDIATRICS-FAMILY DB	551	0	551	45,939.60
	3 Community Health Clinic	0	0	0	0.00

After you access a database from the Corporate Database Summary screen to work the accounts, if you select the **Print to Excel** Action Column button, the Excel report will include a Database (number) and Database Name column.

Corporate Insurance Collections (cont.)

Print Collection Roster (*Corporate > Corporate Collections > Insurance Collections > Print Collection Roster*)
　　Turned into a corporate report - see *Definition of Corporate Report*
　　For additional information, see the *Print Collection Roster* entry under the *Insurance Collections* section of
　　these release notes.

Patient

Patient Detail to Excel *(Patients > Patient Listings >Patient Detail to Excel)*

Added the following Credit Card data elements for the default credit card stored on a patient's account, so you can print a report to see which patients have a credit card on file. If multiple credit cards are stored for the patient, the report will only print the information for the Default credit card.

- C1.3 - Credit Card Expire Date
- C1.4 - Credit Card Number
- C1.5 - Credit Card Type
- C1.8 - Credit Card Holder Name
- C1.9 - Credit Card Zip Code

	A	B	C	D	E	F	G
1	EASTSIDE MEDICAL						
2	Patient Detail to Excel						
3	From Patient	(Start from the First Patient)					
4	Thru Patient	(End with the Last Patient)					
5	From 01-01-2021						
6	Include Patients	with No Activity N					
7	Account	Patient Name	CC Type	CC Card Holder Name	CC #	CC Exp Date	CC Zip Code
8	23936	ANDERSON, ANDY	Visa	ANDY ANDERSON	8888	12/2020	85012
9	25554	BAKER, CIARA	Visa	CIARA BAKER	5439	12/2023	85004
10	25691	Wizard, Washie					

Reports

Aged A/R for Insurance by Billing Group *(Reports > Insurance Related Reports > Aged Accounts Receivable (A/R) for Insurance > Aged A/R for Insurance by Billing Group)*

Added a new **Include Billing Groups by** option, so you can select which Billing Group to use when printing the report. The **Account** option will include Billing Groups based on the Billing Group stored in the Billing Information screen and the **Transaction** option will include Billing Groups based on the Billing Group stored for each transaction.

Reports (cont.)

Missing Charge Report *(Reports > Transaction Journals > Missing Charge Report)*

Enhanced the Excel version of the report with the following:

- Changed **Doc Code** heading to **Dr Code**
- Changed **Doctor** heading to **Dr Name**
- Changed **Date** heading to **Appt Date**
- Changed **Day** heading to **Appt Day**
- Changed **Time** heading to **Appt Time**
- Changed **Loc** heading to **Loc Code**
- Added **Loc Desc** column
- Changed **Typ** heading to **TOV Code** - Will print **None** if no value stored for the appointment
- Added **TOV Desc** column - Will print **None** if no value stored for the appointment
- Moved the **Acct #** column to the left of the **Patient Name** column
- Changed **Status** heading to **Appt Status Code** - Will print **None** if no value stored for the appointment
- Added a column heading for the **Appt Status Desc** - Will print **None** if no value stored for the appointment
- Added **Pri Ins Code**
- Added **Pri Ins Desc**

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	21-Apr-21																
2	EASTSIDE MEDICAL																
3	Missing Charge Report																
4	For all Doctors																
5	For all Locations																
6	For all Types of Visits																
7	From 06-01-2020 through 04-21-2021																
8	Dr Code	Dr Name	Appt Date	Appt Day	Appt Time	Loc Code	Loc Desc	TOV Code	TOV Desc	Acct #	Patient Name	Appt Status Code	Appt Status Desc	Pri Ins Code	Pri Ins Desc		
9	1	CATHY CASTNER, MD	6/1/2020	MONDAY	4:30 PM	1	MAIN OFFICE	FU	FOLLOW UP	26019	RUBIO, PETER	CONF	CONFIRMED	UHC	United HealthCare		
10	1	CATHY CASTNER, MD	6/1/2020	MONDAY	5:00 PM	1	MAIN OFFICE	FU	FOLLOW UP	26484	HILLMAN, ZANE	CONF	CONFIRMED	BCBS	BLUE CROSS		
11	1	CATHY CASTNER, MD	6/2/2020	TUESDAY	1:00 PM	1	MAIN OFFICE	ALL	ALLERGY SHOT	25300	JACKSON, ANDREA	CONF	CONFIRMED	MED50	MEDICARE COMMERICAL PAYER		
12	1	CATHY CASTNER, MD	6/2/2020	TUESDAY	2:00 PM	1	MAIN OFFICE	OP	OFFICE PROCEDURE	26312	BAKER, BRENDA	CONF	CONFIRMED	MED50	MEDICARE COMMERICAL PAYER		
13	1	CATHY CASTNER, MD	6/2/2020	TUESDAY	2:30 PM	1	MAIN OFFICE	None	None	26282	GOLDSBERRY, SHIRLEY	CONF	CONFIRMED	MD	MEDICAID		
14	1	CATHY CASTNER, MD	6/2/2020	TUESDAY	3:00 PM	1	MAIN OFFICE	NP	NEW PATIENT	26515	KOEHN, SYLVAN	CONF	CONFIRMED	MED	MEDICARE		

Schedule

Post No-Show Appointments (*Schedule > Post No-Show Appointments)*

Enhanced the function to post no-show appointments based on the option selected for the **Post No-Shows Based On** field in the **Scheduling System Integration** function *(System > Database Maintenance Menu > Integrations > Schedule Integration > Scheduling System Integration).* For additional information, see the *Scheduling System Integration* entry under the *System* section of these release notes.

System

Scheduling System Integration *(System > Database Maintenance Menu > Integrations > Schedule Integration > Scheduling System Integration)*

Added a **Post No-Shows Based On** field, so you can choose between either **Superbill #** or the Check In/Out Status of the patient's appointment to determine when no-show charges should be posted.

- **Check In/Out Status** - If you want to post No Shows for appointments based on Check In/Out Status Codes, select this option. This would only post No Shows for appointments that have not been saved with any Status Code (*Schedule > Patient Status/Location Table > Maintain Status/Locations*) that has the **Check In/Out Status Code** check box selected.
- **Superbill #** - If you want to post No Shows for appointments based on Superbill #'s assigned to appointments, select this option. This would only post No Shows for an appointment that had a superbill printed but no subsequent charges entered in Procedure Entry.

For additional information, see the *Post No-Show Appointments* entry under the *Schedule* section of these release notes.

Demographic Look-up *(System > File Maintenance Menu > Look-Up Functions > Demographic Look-up)*

The carrier name, code, policy number and termination date (if applicable) will now display when you review a Case record that has insurance policies tied to the case. Previously it was only displaying an internal number that pointed to the policy (*on changes made after 2021.1.0*). Changes made to cases prior to 2021.1.0, will only display the carrier code and the carrier name.

CGM webPAY Integration *(System > Database Maintenance Menu > Integrations > CGM webTOOLS Integrations > CGM webPAY Integration)* *****CGM webPAY Clients Only*****

Added a **Days to Warn for CC on File Expiring** field, so you can enter the quantity of days you want to be warned prior to the patient's card expiring. Valid values for this field are 0-99 days and the default setting is 30 days. Currently this only affects the CC Status yellow dot on the *Review/Send Electronic Statements* function.

For additional information, see the *Review/Send Electronic Statements* entry under the *Billing* section of these release notes.

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 April 1, 2021
- 2021 Medicare DME Fee Schedules; Prosthetics/Orthotics and Supplies (DMEPOS and DMEPEN), revised for effective date January 1, 2021 and updates effective April 1, 2021.
- 2021 Medicare Clinical Laboratory Fee Schedule, effective April 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.

Load the HCPCS Codes *(Tables > Procedure Code Table > Load the HCPCS Codes)* ***Action Required***
Updates to the 2021 HCPCS data files, effective April 1, 2021 are available for loading. To receive the updated codes you must load the 2021 file.

Import RVU Unit Values *(Tables > Relative Value Schedule Table > Import RVU Unit Values)* **Action Required**
The Centers for Medicare and Medicaid Services (CMS) released a subsequent update to the 2021 Medicare Relative Value Unit files (RVUs) effective January 1, 2021 and April 1, 2021. To receive the updated codes you must load the **2021** file.

Maintain Insurance Denial Codes *(Insurance Denial Code Table)*
The updated Claim Adjustment Reason Codes (CARC) and Remittance Advice Remark Codes (RARC), effective March 1, 2021 have been released.

Transactions

Transaction Detail to Excel *(Transactions > Transaction Journals > Transaction Detail to Excel)*
  Added the following data element to the report:
  - **Proc-Timestamp Posted** - Prints the date and time the procedure was posted.

Electronic Remittance Advice (ERA) - EOB *(Transactions > Electronic Remittance Advice (ERA)… > Import and Post ERA Files)*
Made the following enhancements to printed EOBs:
  - Removed AMT*AU segment data from the GRP/RC Column, since the total allowed amount already displays.
  - Changed "**ADJS: PREV PD**" to "**PAT PREV PD**" at the bottom. The F5 information will continue to display there.
  - Added a **Claim Status** field for each claim to display the status provided in the CLP02 segment.
  - The code returned in the F5 segment will now print at the bottom of the EOB in the **CARC CODE/DESCRIPTION**.