

What's New in

CGM webPRACTICE<sup>™</sup> v2022.4.0

# **Final Release Notes**

November 9, 2022



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## **INTRODUCTION**

This document provides an overview of new features, resolutions, and enhancements available in the release of CGM webPRACTICE v2022.4.0. 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 v2022.4.0 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	Load ICD-10-CM Codes	Load the updated files if applicable
10 Import RVU Unit Values		Load the updated files if applicable
10	Load the HCPCS Codes	Load the updated files if applicable
10	Load the HCPCS Codes	Verify the Type of Service codes for Wound Management HCPCS if applicable
11 Import Fee Schedules		Load the updated files if applicable
11 Load the AMA CPT® Codes		Load the updated files if applicable

## **Summary of Changes to Document**

#### Preliminary Release Notes were released November 1, 2022.

Section	Function	Added/Deleted/Revised



## **General Enhancements**

#### **CGM Direct Scanning**

We are pleased to announce that you can now scan images directly within CGM webPRACTICE using our new add-on product *CGM Direct Scanning* when using Google Chrome or Microsoft Edge. This new functionality has been incorporated into the already existing **Attach Image** Action Column button throughout the system.

After *CGM Direct Scanning* has been activated in your system and the *CGM Direct Scanning Integration* has been completed, a new **Attach Image** window will display that includes a **Scan** button in addition to the standard **Attach** button. The file types that can be attached within this function are the same types that can be attached with the regular **Attach** function - png, gif, bmp, and jpeg. After you scan an image, there are multiple options available to edit the image if needed, such as rotate, crop, cut, etc. If you would like more information, contact CGM Sales.

Functions in the system with the Attach Image Action Column button:

Patient > Change Patient Data

- Patient Name and Address Information
- Guarantor Information
- Insurance Policy Information
- Patient Authorization Record
- Images

Patient > Registration

- Patient Name and Address Information
- Guarantor Information
- Insurance Policy Information

Reports > Data Management System > DMS Letter Processor > Maintain Letters (Insert Image) System > Form Wizards > Superbill Wizard > Insert Image Transactions > Transaction Batch Control > Create a Batch Transactions > Transaction Batch Control > Edit a Batch Transactions > Payment Entry Function



## **General Enhancements (cont.)**

#### **E-mail Validation**

Validation rules have been added for e-mail fields throughout the system, to ensure valid email addresses are entered. If the e-mail address is not in a valid format, one of the following messages will display:

- Must contain exactly one @ character.
- Cannot be more than 64 characters long.
- Cannot contain consecutive dots.
- Cannot start with a dot.
- Cannot end with a dot.
- Contains an invalid character. Valid characters are:
  - 'A to Z', 'a to z', '0 to 9'
  - 0 !#\$%'\*+-/?^\_`{|}~=&
- Domain name cannot contain consecutive dots.
- Domain name cannot contain consecutive hyphens.
- Domain name cannot start with a hyphen.
- Last character of domain name cannot be a hyphen.
- Domain name is not valid.

For additional information, see the *Invalid E-Mail Patient Listing* entry under the *Patient* section of these release notes.

Note: You can leave the field blank or enter the word NONE, if a valid e-mail address is not available.



Collections

**Review for Turn Over Report** and **Third Party Turn Over Report** (Collections > Patient Collections > Turn Over Functions)

When you print the reports with **Transaction Detail**, the **Original Charge Amount** for each transaction has been added. Column headings were also added in the Transaction Detail section to make it clear what each column represents.

Sep (	p 07, 2022 EASTSIDE MEDICAL F Numeric Thind Party Turn Over Report Doctor 1 - CATHY CASTNER, MD, DO Date Last Populated 09-07-2022 AT 12:04A BY CGM webPRACTICE Aged by Accounting Date						Page 1			
Acc ID#	Guarantor's Name & Address Patient's Name	s <mark>L</mark> ast Visit P	Last ayment	Total Balance	Current Balance	30 Day Balance	60 Day Balance	90 Day Balance	120 Day Balance	150 Day Balance
26542	2 Winter, Reese	05-05-22 Pat: 0 Delinquent Ba	6-24-21 lance	429.15 429.15					404.15	25.00
Pat	Phone #: 207-478-2158 DC PO Box 1234 Ridgeport, ME 0441 207-478-2158 Primary Insurance > AET Deductible Amount > Co-Pay Amount > Liability Percentage > 100	DB: 01-01-1976 SSN L6 「 - AETNA 0.00 5.00 )	: 635-46-4	123 Last !	Stm: 11-6	93-2021				
	Service Date         Proc Code           10-05-2021         NS           05-05-2022         99214           05-05-2022         10080	Proc Description NO SHOW OV EST LEV 4 DRAINAGE'S OF PILONI	Patient Reese Reese Reese	Original Cl 25.0 325.0 100.0	hg PtE 00 00 00	Balance 25.00 313.40 90.75				
Tot	tal Patient Balance			429.15					404.15	25.00

The **Original Charge Amount** of each transaction has also been added to the Excel versions of the reports and the **Trans Amount** column heading was changed to **Pt Bal Amt**.



#### **Patient**

### Invalid E-Mail Patient Listing (Patient > Patient Listings > Invalid E-Mail Patient Listing)

With this new report you can print a list of patient accounts that do not contain valid e-mail addresses. Upon accessing this function, you will have the option to sort it alphabetically or numerically, only include patients that have appointments scheduled (for a selected date range), include any patients that have NONE entered for their e-mail address and select if you want to include accounts that have not had any activity. You also have the option of printing this report using a DMS list. For additional information, see the *E-Mail Validation* entry under the *General Enhancements* section of these release notes.

Invalid E-Mail Patient Listing		
Sort Order	OAlphabetic	O Numeric ✓
Only Include Patients with Appointments		
From Appointment Date	08-26-2022	
Through Appointment Date	08-26-2023	
Include Patients with the E-Mail Address 'NONE'	<	
Include Patients with No Activity		
Print from List		~

#### Sample report:

The information contained in this report includes account number, patient name, which record the invalid e-mail address is stored in (for example: *Patient, Guarantor, Pre-Reg, Quick Reg, etc.*), email address and the reason it is invalid and the patient's phone number.

Sep 06, 2022	Sep 06, 2022 EASTSIDE MEDICAL Pag Numeric listing of Patients with Invalid E-Mail Addresses Includes Patients with the E-Mail Address 'NONE'							
Account	Patient Name	Record	E-Mail Address / Reason	Phone				
25215	BAKER, BETTY	Patient	43243 Must contain exactly one @ character	602-222-8967				
25620	Smith, Martha	Patient	beu@bilt	615-332-2200				
25621	Bates, Theresa	Patient	Domain name is not valid. e-mail@email Domain para is not valid	615-232-4252				
25639	Smith, June	Patient	none NONE is not a valid email address					
25996	ANDERSON, ALEXIS	Patient	NONE					
26088	Ridgell, Starr	Patient	NONE is not a valid email address NONE@none.com Cannot start with NONE	207-478-2158				
26090	Swift, Taylor	Patient	noemail@email.com Cannot start with NOEMAIL.					
26556	SMITH, ROCHELLE	Patient	mlyall@pentwater.k12 Invalid E-Mail per CGM CONNECTION					
26565	Bear Smith, Lauren	Patient	HELLO 12-456-7899 Must contain exactly one @ character.					
End of Report. Requested by M	End of Report. Patient/Lists/Invalid E-Mail Patient Listing Requested by MGR and completed at 3:48PM on Sep 06 2022							



#### **Reports**

**Compile UDS Reports** (*Reports* > UDS *Reports* > Compile UDS *Reports*) and **Print UDS Reports** (*Reports* > UDS *Reports* > Print UDS *Reports*)

Enhancements released for the following UDS Reports to meet the new reporting standards for CY 2022.

- Table 6A Selected Diagnosis and Services Rendered
- Table 6B Quality of Care Measures
  - The Date used to identify age has been changed to December 31<sup>st</sup> instead of June 30<sup>th</sup>.
- Table 3A Patients by Age and Sex Assigned at Birth
  - The Date used to identify age has been changed to December 31<sup>st</sup> instead of June 30<sup>th</sup>.
- Table 3B Demographic Characteristics
- Table 4 Selected Patient Characteristics Section
- Table 7 Health Outcomes and Disparities

## Schedule

### **Enter Patient Appointments** (*Schedule > Enter Patient Appointments*)

Two new navigation buttons have been added under the calendar so you can quickly jump forward 3 months or 6 months in the schedule.

Enter Patient App	ointments									E	asts	side	Me	s) dic	STEI al -	4 MA 00(	NAGER
Patient						Oc	tob	er	~	2022	2 ~	No	vem	ber		20	)22
Referring Doctor:						s	М	Т	W	T F	S	S	М	Т	W	r F	S
Commont:											1			1 2	2 3	4	5
comment:						2	3	4	5 6	7	8	6	7	8 9	1	11	12
Phone:		Patient E-Mail:				9	10	11	12 1	3 14	15	13	14	15 1	6 1	7 18	19
Rsp Doctor:			Billing	Grp:		16	17	18	19 2	0 21	22	20	21	22 2	23 24	1 25	26
Visits since Jan:	N	lo Shows:	Sex:	Age.		23	24	25	26 2	7 28	29	27	28	29 3	80		
Pri Ins:	Copay:	Spec Copay:	Pat \$:		0.00	30	31										
Sec Ins:	Copay:	Spec Copay:	Ins \$:		0.11	«		: <b>Т</b>	oday	/ >	<b>&gt;</b>	OF	FIC	E VI	SIT		~
Last Visit:	Col Bal:		Tot \$:		0.00	3	mo	s ≫		6 mo	s≫						
Schedule for Monday, October 17, 2022																	



### **Tables**

Load ICD-10-CM Codes (Tables > Diagnosis Code Table > Load ICD-10-CM Codes) \*\*\*Action Required\*\*\* The updated ICD-10 code set, effective October 1, 2022-September 30, 2023 is available for loading. This code set is included, so you are **not** required to purchase it.

**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 2022 Medicare Relative Value Unit files (RVUs) effective October 1, 2022. To receive the updated codes, you must load the **2022** file.

Load the HCPCS Codes (Tables > Procedure Code Table > Load the HCPCS Codes) \*\*\*Action Required\*\*\* Updates to the 2022 HCPCS data files, effective October 1, 2022, are available. To receive the updated codes, you must load the 2022 file.

Maintain Insurance Carriers (Tables > Insurance Carrier Table > Maintain Insurance Carriers) Corrected an issue when adding a new insurance carrier or editing an existing carrier and you clicked the *eMEDIX Website* Action Column button or the *eMEDIX Payer List* Action Column button prior to clicking **Save.** For example, if you were entering a new insurance carrier and filled out the address, phone number, etc. and then clicked the *eMEDIX Payer List* Action Column button, the address, phone number fields, etc. would be cleared out. With this correction, any data entered or edited in the input fields will no longer be cleared out when you click the Action Column buttons, but you will still need to click **Save** prior to exiting the function.

Load the HCPCS Codes (*Tables > Procedure Code Table > Load the HCPCS Codes*) **\*\*\*Action Required\*\*\*** The following issues have been corrected for the loading of Wound Management codes (A2000 - A2999).

- 1. If you only selected **Wound Management**, when you clicked **Save** you would receive the message "*No Codes Selected*." and the codes would not load.
- 2. If you selected **Wound Management** in addition to other selections, you were not required to pick a **Type of Service** for the Wound Management codes and you should have been.
- If you selected Wound Management and new Wound Management codes were loaded into the *Procedure Code Table*, the Type of Service for the new codes was incorrectly set to "Y", which isn't a valid Type of Service.

**Note**: If you loaded any new **Wound Management** codes (in the range: A2001-A2013) prior to this update, you need to access the *Procedure Code Table* and verify the **Type of Service** for those codes.



## Tables (cont.)

## ANSI CARC/RARC Codes (Tables > ANSI CARC/RARC Codes)

Replaced the *Insurance Denial Code Table* with the *ANSI CARC/RARC Table* and added filtering options, so you can quickly find the codes you want. When you first access the *Maintain ANSI CARC/RARC Codes* function, the screen will display all the codes in the table. You can click any column heading to resort the page as needed.

### **Maintain Adjustment Codes** (*Tables > Maintain Adjustment Codes*)

Added a **Default CARC Code** field, so you can select a CARC code to default whenever you select this adjustment code during transaction entry. This new field will be used when new functionality for posting multiple adjustments in payment entry is released in early 2023.

### **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:

- 2022 Medicare Clinical Laboratory Fee Schedule, effective October 1, 2022
- 2022 Medicare DME Fee Schedules; Prosthetics/Orthotics and Supplies (DMEPOS), effective October 1, 2022

The updated files are available for import by selecting 2022 in the **Fee Schedule Year** list and the applicable file name in the **Fee Schedule File** list.

## Load the AMA CPT<sup>®</sup> Codes (Tables > Procedure Code Table > Load the AMA CPT<sup>®</sup> Codes) \*\*\*Action Required\*\*\*

The 2022 **PLA** CPT codes are available. The PLA codes are Pathology and Lab Specific CPT Codes and can be loaded by selecting the **Pathology and Lab** code category.



## Transactions

## Transaction Journals to Excel – All Sorts (*Transactions > Journals > Transaction Journals to Excel*) New columns have been added for Code Descriptions for Per Dr, Ins Dr, Location and Schedule Dr.

#### Edit an Encounter (Transactions > Edit an Encounter > Edit (Audit Trail))

Several enhancements have been made to the Audit Trail functionality to make it easier to view changes made to encounters.

#### Notable enhancements:

- The audit trail will now include changes made prior to the encounter being posted (including *Unposted Procedures* changes).
- When the encounter is posted, the Comment will display as "Posted".
- You can see the original source of the encounter examples: Procedure Entry, E-Superbill, CGM webMOBILE or Interfaces.
- You can view before and after changes on one screen. Changes are displayed in red.
- The timestamp now includes seconds.

#### Examples of enhanced functionality:

When you first access the function, select Edit from the encounter drop-down list.

	Edit an Encounter					EAST	System Manager SIDE MEDICAL (1)
Notes INotes Refresh Hide Rev/Neg/Moved Expand All Select All	Patient: 23936 - ANDERSON, ANDY ** 555 S MAIN STREET PHOENIX, AZ 85012 (H) 602-555-5555 (C) 602-555-0127 PATIENT HARD OF HEARING!			A - All C Encount Date of S From Actions	Cases ter Service	Thru	▼ ▼ 
Remove Filter	Encounter 10985 - 08/01/2022  Case Billing Group Billing Gr Reverse (Claim(s) Sent) ICD-9 Di, Negate 0 - NO D Deny Refile Refile MED, Demand		Status ICD-10 Diagno W53.01XA - E W21.00XA - S	s Open sis Code(s): Bitten by mouse, init Struck by hit or throw	ial encounter vn ball, unspecified	type, in	Ì
	+ sFile	ion	\$ Charge	\$ Ins Bal	\$ Pat Bal	\$ Tot Bal	Ins Img
	Pend     Unpend	OUTPATIENT ESTABLISHED M 30-39 MIN	\$325.00	\$325.00	\$0.00	\$325.00	E
	Last Sav Edit	Totals:	\$325.00	\$325.00	\$0.00	\$325.00	

#### Click the Audit Trail Action Column button to view any changes made to the encounter.

	Encour	nter Edit		System Manage EASTSIDE MEDICAL (1,
History	Name	23936 - ANDERSON, ANDY	Ins	MED Y / Balance 1082.35
Add a Case	Date	08-01-2022 DOB: 11-30-1971 (50) M	Billing Group	MED Q√ Last Visit: 08-01-2022 (OV EST LEV 4)
Add Procedure	Batch #	Q	Comment	PATIENT HARD OF HEARING!
Audit Trail	Case	0 Not applicable (0)	Diagnosis	Q X C ICD-9 ICD-10
	Per Dr	1 1 - CATHY CASTNER, MD, DO (1) V	/	1 V WS3.01XA Bitten by mouse, initial encounter
T	Ins Dr	1 1 - CATHY CASTNER, MD, DO (1) V	/	2 V W21.00XA Struck by hit or thrown ball, unspecified type, in
	Sup Dr	Q		
	Loc	1 AMAIN OFFICE (1)	/	
	Superbill #		Ref Dr	151 Q JOAN BAILEY
	Department	v	Svc Script	7 Date of III/Inj
	Claim Hold	Reason	Ins Dr Taxonomy	Health & Wellness Coach (171400000X)
	Encounter A	ctions 👻 Show all fields?		Warning! A Refile must be performed if claim(s) should be generated for the changes made. No Attachments 🖉 🗧 📿
	Serv Date	e Proc Description		Mod Diag A Mlt Chg Amt
	08-01-20	22 99214 Q OFFICE/OUTPATIENT ESTA	BLISHED MOD I	1 2 Y 1 325.00 dd @y



## **Transactions (cont.)**

## Edit an Encounter (cont.)

The *Audit Trail* page will display any changes made to the encounter, including the timestamp when the changes were made, the user that made the changes and the comment entered when the change was made. Click in any row to view the detailed information for the change.

History for Enco	History for Encounter 10985 - 08/01/2022 EASTSIDE MEDICAL (1)								
		/	23936 - ANDERSON, ANDY						
Timestamp 💌	User		Comment						
08/01/2022 02:44:11PM	MGR		Posted						
08/31/2022 03:01:41PM	MGR		Changed ref dr and removed hold date						

In the example below, you can see the initial record of when the encounter was created – the **Before** column indicates there was *No Previous Record* and the **After** column displays the data that was entered. Click **Next** to view the details for the next change made to the encounter.

History for Encounter 109	985 - 08/01/2022				EASTSI	System Manager DE MEDICAL (1)
		23936 - ANDERSON, ANDY				
Encounter Created at 02:44:11PM						*
User: MGR						
Date: 08/01/2022						
Original Source: Procedure Entry						
Comment: Posted						
	Before	After				
Accounting Date	(No Previous Record)	08-01-2022				
Batch Number						
Billing Group		MEDICARE PATIENTS (MED)				
Case Id		Not applicable (0)				
Date Of Injury						
Department						
Hold Reason						
Hold Until Date		08-05-2022				
Insurance Doctor		CATHY CASTNER, MD, DO (1)				
Location		MAIN OFFICE (1)				
Performing Doctor		CATHY CASTNER, MD, DO (1)				
Referring Doctor		FISHER, KENNETH (FIS)				
Service Script						
Status						
Superbill Number						
Supervising Doctor						
Ins Dr Taxonomy		Health & Wellness Coach (171400000X	)			
Diagnosis Codes:						
Diagnosis #1		W53.01XA				
Diagnosis #2		W21.00XA				
Procedure #1					1	
Accept Assignment		Y			/	
Charge Amount		325.00		/		
Diagnosis Pointers ICD 10		1,2				
Modifiers						•
Q			<< Prev	Next>>	Cancel	



## Transactions (cont.)

## Edit an Encounter (cont.)

You can easily see the changes that were made to the encounter and the **Comment**.

System Mana History for Encounter 10985 - 08/01/2022 EASTSIDE MEDICAL (							
	23936 - ANDERSON, ANDY						
Encounter Changed at 03:01:41PM		*					
User: MGR							
Date: 08/31/2022							
Original Source: Procedure Entry	even und held data						
Comment: Changed ref dr and		10					
	Before	After					
Accounting Date	08-01-2022	08-01-2022					
Batch Number							
Billing Group	MEDICARE PATIENTS (MED)	MEDICARE PATIENTS (MED)					
Case Id	Not applicable (0)	Not applicable (0)					
Date Of Injury							
Department							
Hold Reason							
Hold Until Date	08-05-2022						
Insurance Doctor	CATHY CASTNER, MD, DO (1)	CATHY CASTNER, MD, DO (1)					
Location	MAIN OFFICE (1)	MAIN OFFICE (1)					
Performing Doctor	CATHY CASTNER, MD, DO (1)	CATHY CASTNER, MD, DO (1)					
Referring Doctor	FISHER, KENNETH (FIS)	JOAN BAILEY (151)					
Service Script							
Status							
Superbill Number							
Supervising Doctor							
Ins Dr Taxonomy	Health & Wellness Coach (171400000X)	Health & Wellness Coach (171400000X)					
Diagnosis Codes:							
Diagnosis #1	W53.01XA	W53.01XA					
Diagnosis #2	W21.00XA	W21.00XA					
Procedure #1							
Accept Assignment	Y	Y					
Charge Amount	325.00	325.00					
Diagnosis Pointers ICD 10	1,2	1,2					
Modifiers		•					
Q		<< Prev Next>> Cancel					

**Note**: The enhanced tracking for changes made while the encounter is in *Unposted Procedures* will not be effective until after the 2022.4.0 has been installed.

Import and Post ERA Files (Transactions > Electronic Remittance Advice (ERA) > Import and Post ERA Files) Multiple enhancements were made to improve carrier and policy matching to reduce the quantity of exceptions when posting ERA files. This includes crossover payments that were incorrectly identified as primary payments when they should have been identified as secondary payments.