



CompuGroup™
Medical

What's New in

CGM webPRACTICE™ v2024.1.0

Final Release Notes

March 13, 2024

CGMwebPRACTICE™

Fully Web-Based Practice Management Suite



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INTRODUCTION

This document provides an overview of new features, resolutions, and enhancements available in the release of CGM webPRACTICE v2024.1.0. 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 v2024.1.0 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
11	Import Fee Schedules	Load the updated files if applicable
11	Load the HCPCS Codes	Load the updated file if applicable
11	Load AMA CPT® Codes	Load the updated file if applicable
11	Import RVU Unit Values	Load the updated file if applicable

Summary of Changes to Document

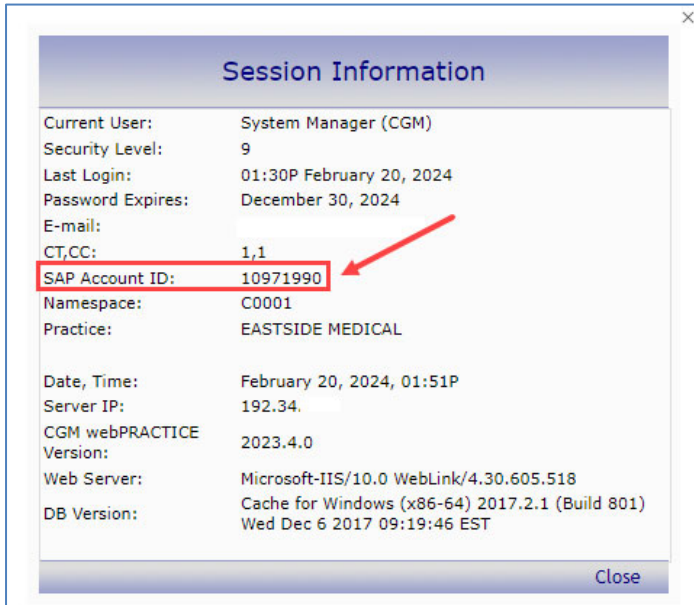
Preliminary Release Notes were released March 05, 2024.

Section	Function	Added/Deleted/Revised
System	Reports Integration	Revised the 'Note'

General Enhancements

Session Information

Enhanced the display to include your **SAP Account ID**.



Managed Care

Expected Payment Report (Managed Care > Management Reports > Expected Payment Report)

Resolved an issue where the multiplier for a procedure was not taken into consideration when providing the expected payment amount. An **Mlt** column was also added for both the standard and Excel versions of the report.

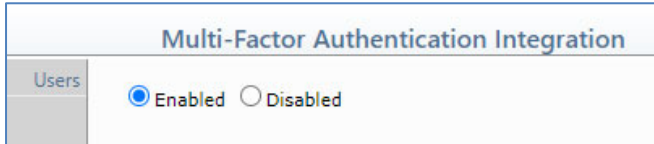
Feb 29, 2024		EASTSIDE MEDICAL						Page 2
Expected Payment Report								
From 02-29-2024 Through 02-29-2024								
Fee Schedule - CIG								
ID#	Patient Name	CPT	Mlt	Charge	Expected	Actual	%	Adjusted
26623	Dash, Khloe	10080	3	990.00	722.79	300.00	30.3	0.00
26623	Dash, Khloe	99214	1	325.00	123.93	200.00	61.5	0.00

End of Report. Managed Care/Reports/Expected Payment
 Requested by ANBARIN and completed at 3:49PM on Feb 29 2024

System

Multi-Factor Authentication Integration (MFA) (System > Database Maintenance Menu > Integrations > Multi-Factor Authentication Integration) ***New Functionality***

You can now enable MFA when logging onto CGM webPRACTICE. For hosted clients, MFA will be automatically enabled and required for users starting with the 2024.1.0 update. All self-hosted clients will have the option to enable or disable MFA. MFA acts as an additional layer of security to prevent unauthorized users from accessing CGM webPRACTICE.



After MFA has been enabled, each user will need to complete the Multi-Factor Authentication setup steps. This function also allows you to reset the MFA configuration for a user when needed. For example, if a user gets a new mobile device or if there is an issue with their MFA configuration. The detailed setup steps and reset steps are available in CGM webPRACTICE Help under *Introduction > System Processes > Multi-Factor Authentication Instructions*.

System Log (System > File Maintenance Menu > Look-Up Functions > System Log)

Enhancements made to track the following actions within the *Multi-Factor Authentication Integration* function.

- Multi-Factor Authentication is enabled or disabled.
- MFA is reset for a user.

For hosted clients: The first entry will show that MFA was enabled by the system, since it is required and will automatically be enabled when 2024.1.0 is installed. After that the only entries will be when users are reset.

System Log				
Add/Edit Filter	System/Database Maintenance Menu/Integrations/Multi-Factor Authentication Integration			
Remove Filter	Date/Time ▲	DB	User	Message
	02-07-2024 12:30PM	1	MGR	MFA Reset for user : DR. ANDERSON (AND)
	02-07-2024 12:29PM	1	SYSTEM	Multi-Factor Authentication set to Enabled. MFA is required on CGM hosted servers.

System (cont.)

For Self-hosted clients: The entries will show any actions for Enable, Disable and Resets.

System Log				
Add/Edit Filter	System/Database Maintenance Menu/Integrations/Multi-Factor Authentication Integration			
Remove Filter	Date/Time ▲	DB	User	Message
	02-07-2024 12:36PM	1	MGR	Multi-Factor Authentication changed from Disabled to Enabled
	02-07-2024 12:36PM	1	MGR	Multi-Factor Authentication changed from Enabled to Disabled
	02-07-2024 12:36PM	1	MGR	MFA Reset for user : DR. ANDERSON (AND)
	02-07-2024 12:35PM	1	MGR	Multi-Factor Authentication set to Enabled

List the System Status – Interface Status (*System > List the System Status > Interface Status*) *****Interface Clients Only***** *****New Functionality*****

If you have an active interface, a new **Interface Status** Action Column button is available.

List the System Status						System Manager EASTSIDE MEDICAL (1)
Refresh	Users Currently Logged On: 0					
Interface Status	The caretaker is running .					
	JPort (?) is running .					
Job ▼	User	Description	DB	Function	UIT	
6704	C0001-MGR	System Manager	1	Utilities/Client Error Management	00:03:08	
*7920	C0001-MGR	System Manager	1	System/System Operations Menu/Status	00:00:00	
9008		Caretaker			610:06:27	
9320	C0001-MEL	MELANIE BROOKS	1	Schedule Menu	02:21:49	

Upon accessing this function, you can easily check the status of the interface.

List the System Status - Interface Status							SYSTEM MANAGER Analytics Testing Database (9)
Refresh	Connection ▼	Name	Orientation	Last Success	Status	Queue	
	0002B	LABDAQ	Receive	11/20/2023 16:46:53	Running	Empty	
	0002I	Inbound Demographic Test	Receive	11/01/2023 14:16:23	Running	Empty	
	0002R	MedStar INCOMING CHARGES	Receive	07/07/2021 12:56:57	Running	Empty	
	0002S	MedStar TEST OUTBOUND	Send	11/07/2023 09:38:41	Running	11 messages	
	2000W	WebService Send	Send	No activity	Not Running - contact Customer Service	11 messages	

The following information will display for the interface:

- **Connection** - Internal identification number of the interface.
- **Name** - Description of the interface.
- **Orientation** - This indicates the type of interface; Send (Outgoing) or Receive (Incoming).
- **Last Success** - Shows that last date and time the interface successfully ran.
- **Status** – Shows the status of the interface, Running or Not Running
- **Queue** - How many messages are currently in the queue that have yet to be processed.



System (cont.)

Demographic Look-Up (System > File Maintenance > Demographic Look-up)

Add/Edit Filter, **Remove Filter** and **Print to Excel** Action Column buttons have been added to both the *Demographic Changes* and *Account Access History* screens, so you can filter and print the results.

Demographic Changes for Account 26240 - SHELTON, BLAKE						System Manager EASTSIDE MEDICAL (1)
Account Access History	Date ▲	Time	Record	User	Action	
Add/Edit Filter	05-03-2023	10:17A	Authorization	MELANIE BROOKS (MEL)	Added	
Remove Filter	03-01-2023	03:43P	Insurance	MELANIE BROOKS (MEL)	Policy Changed	
Print to Excel	12-29-2022	09:56A	Billing	MELANIE BROOKS (MEL)	Changed	
	12-29-2022	09:50A	Employer	MELANIE BROOKS (MEL)	Changed	

The *Demographic Changes* filter allows you to filter by Dates, Record Type, User and Action. The Record types are tied to various functions when you change patient data (Billing, Case, Insurance, etc.). The Actions available represent what action was taken on the account; Added, Deleted, Changed, etc.

Demographic Changes - Add/Edit Filter	
From Date	04-23-2014  ✓
Through Date	05-03-2023  ✓
Record Type	Insurance ▼
User	MELANIE BROOKS (MEL) ▼
Action	▼


When adding a filter – the **From Date** field will default to the first date a change was made to the patient's account and the **Through Date** will default to the last change made to that patient's account. In the example below, the changes have been filtered by the **Insurance-Record Type**.


Demographic Changes for Account 26240 - SHELTON, BLAKE						System Manager EASTSIDE MEDICAL (1)
*** Filter Applied ***						
(From Date = '04-23-2014', Thru Date = '05-03-2023', Record Type = 'Insurance', User = 'MELANIE BROOKS (MEL)')						
Account Access History	Date ▲	Time	Record	User	Action	
Add/Edit Filter	03-01-2023	03:43P	Insurance	MELANIE BROOKS (MEL)	Policy Changed	
Remove Filter	10-18-2022	10:42A	Insurance	MELANIE BROOKS (MEL)	Policy Changed	
Print to Excel	10-18-2022	10:42A	Insurance	MELANIE BROOKS (MEL)	Policy Added	
	12-11-2020	02:30P	Insurance	MELANIE BROOKS (MEL)	Policy Changed	
	12-11-2020	02:30P	Insurance	MELANIE BROOKS (MEL)	Policy Changed	
	10-06-2020	11:47A	Insurance	MELANIE BROOKS (MEL)	Policy Added	
	10-01-2020	09:46A	Insurance	MELANIE BROOKS (MEL)	Policy Added	
	06-29-2020	08:53P	Insurance	MELANIE BROOKS (MEL)	Policy Changed	
	06-29-2020	08:53P	Insurance	MELANIE BROOKS (MEL)	Policy Copied	

System (cont.)

The *Account Access History* filter allows you to filter by Dates, Menu Function, User, Menu Function and Menu Function Free Text.

Account Access - Add/Edit Filter

From Date:  ✓

Through Date:  ✓

User:

Menu Function: ▼

Menu Function Free Text:



The **Menu Function** field provides the ‘top level’ menu functions to choose from. You can enter text in the **Menu Function Free Text** field if you want to narrow down the results to a specific function. For example, ‘Employer. The free text is not case dependent – so you can enter ‘EMPLOYER’ and it will still find all the entries for ‘Employer’.

Account Access History for Account 26240 - SHELTON, BLAKE				System Manager EASTSIDE MEDICAL (1)
*** Filter Applied ***				
(From Date = '07-05-2022', Thru Date = '01-03-2024', Menu = 'Patient', Text Contains = 'Employer')				
Date ▲	Time	Menu Path and Function	User	
12-29-2022	09:50A	Patient>Change>Employer Information	MELANIE BROOKS (MEL)	
12-29-2022	09:47A	Patient>Change>Employer Information	MELANIE BROOKS (MEL)	

Patient Account Access Look-up (System > File Maintenance > Look-Up Functions > Patient Account Access Look-Up) ***New Functionality***

With this function you can find all the patient accounts that were accessed for a specified date range. When you first access this function the Filter page will display, so you can specify the date range you want. In addition, you can filter the data for a single Patient Account, a User, Menu Function (top level) or a specific menu function by entering the name in the **Menu Function Free Text** Field.

Patient Account Access Look-up - Add/Edit Filter

From Access Date:  ✓ Through:  ✓

Patient Account: ...

User: ▼

Menu Function: ▼

Menu Function Free Text:

System (cont.)

The results will display the Date, Time, Menu Path and Function name that was used to access each account, and the User that accessed the accounts. A **Print to Excel** Action Column button has been provided, so you can print the filtered results to Microsoft Excel via MyReports.

Patient Account Access Look-up						System Manager EASTSIDE MEDICAL (1)
Add/Edit Filter	Date ▲	Time	Account	Patient Name	Menu Path and Function	User
Remove Filter	02-19-2024	02:58P	26240	SHELTON, BLAKE	Patient>Change	MELANIE BROOKS (MEL)
Print to Excel	02-19-2024	02:16P	26240	SHELTON, BLAKE	Patient>Change	MELANIE BROOKS (MEL)
	02-19-2024	01:03P	26617	RABBIT, BETTY	Transactions>Payment Entry	System Manager (MGR)
	02-19-2024	01:03P	26619	Fox, Sammy	Transactions>Payment Entry	System Manager (MGR)
	02-19-2024	01:02P	25890	THOMPSON, MARK	Transactions>Procedure Entry	System Manager (MGR)
	02-19-2024	01:02P	23936	ANDERSON, ANDY	Patient>Change	System Manager (MGR)

Reports Integration (*System > Database Maintenance Menu > Integrations > Reports Integration*)

*** New Functionality ***

With this new function you can control if patients' Social Security Numbers will be asterisk filled or not when printing the following reports:

Report Integration		System Manager EASTSIDE MEDICAL (1)
Report Name ▼	Asterisk fill SSN	
Duplicate Patient Listing	Yes	
Patient Detail to Excel	Yes	
Print Appointment Schedule	Yes	
Print Appointment Schedule to Excel	Yes	
Print Scheduled Patient Detail to Excel	Yes	
Transaction Detail to Excel	Yes	

When you access the function, a listing of the available reports displays along with the current setting to show if the Social Security Numbers will be asterisk filled or not. You can change the setting by clicking on a report and clearing the **Asterisk Fill SSN** check box.

Report Integration	
Report Name	Duplicate Patient Listing
Asterisk Fill SSN	<input checked="" type="checkbox"/>

Note: The **Asterisk Fill SSN** check box will be selected for all reports as the default unless your system had a customization in place to show SSNs, which would override the default value. If you print any of the reports listed above and the SSN field does not behave as expected, contact Customer Service.

Tables

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

Updates to the 2024 HCPCS data files, effective January 1, 2024, are available. To receive the updated codes, you must load the 2024 file.

Load the AMA CPT® Codes (*Tables > Procedure Code Table > Load the AMA CPT® Codes*)

The 2024 CPT codes are available.

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:

- 2024 Medicare Physician Fee Schedule, effective January 1, 2024
- 2024 Medicare DME Fee Schedules; Prosthetics/Orthotics and Supplies (DMEPOS), effective January 1, 2024

The updated files are available for import by selecting 2024 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 2024 Medicare Relative Value Unit files (RVUs) effective January 1, 2024. To receive the updated codes, you must load the **2024** file.

Maintain ANSI CARC/RARC Codes (*Tables > ANSI CARC/RARC Table > Maintain ANSI CARC/RARC Codes*)

Due to confusion over the purpose of the **RARC Required** check box, the ScreenTip for the field has been updated with the following; *As of February 2024, this field is informational only and maintained by CGM. This field will be utilized in the future enhancements planned for Payment Entry.*

Tables (cont.)

Interface Notifications (Tables > Interface Notifications) ***Inbound Interface Clients Only***

A new **Unmapped Table Items** Action Column button has been added, so you can see at a glance any table items that you need to map (for the interface specific to the database you are currently logged into). If there aren't any table items to be mapped, the button will not display.

Interface Notifications							System Manager DB12 (12)	
Table	Code	Description	Date ▲	Source	Worked	User		
	AET	AETNA	01-17-2024	0001G - Recv Quantum DFT Test	N			
	MC	MEDICARE	01-17-2024	0001G - Recv Quantum DFT Test	N			

Buttons: Show All, Show Worked, **Unmapped Table Items** (highlighted with a red box and arrow)

After accessing **Unmapped Table Items**, all the unmapped codes captured by the interface will display. Click anywhere in the row to select the unmapped code.

Interface Notifications - Unmapped Table Items							System Manager DB12 (12)	
Interface ▲	Name	Database	Table	Unmapped Code	Patient Last Name	Patient First Name		
0001G	Recv Quantum DFT Test	12	Insurance Carrier Table	2SD	Mae	Daisy		
0001G	Recv Quantum DFT Test	12	Insurance Carrier Table	22230SD	Mae	Daisy		

Red box highlights the first row. Red arrow points to the 'Unmapped Code' column.

When the detailed information displays, you can select the CGM webPRACTICE code that this unmapped code should be mapped to from the **Target Code** list. After you map a code and click **Save**, the code will no longer display in the list of unmapped table items.

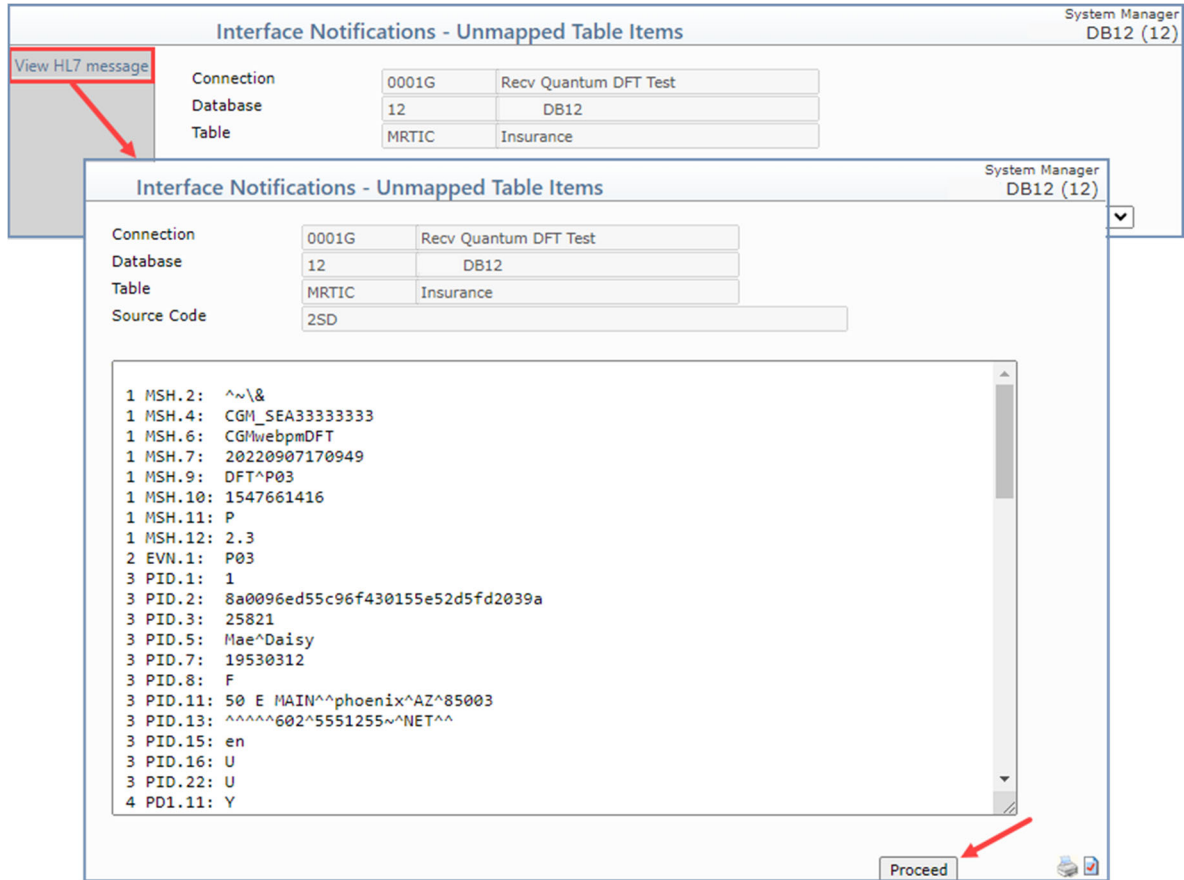
Note: If there are multiple occurrences of an unmapped table item for different messages, you will only be required to map the code a single time, which will automatically update every message.

Interface Notifications - Unmapped Table Items				System Manager DB12 (12)	
View HL7 message	Connection	0001G	Recv Quantum DFT Test		
	Database	12	DB12		
	Table	MRTIC	Insurance		
	Source Code	2SD			
	Target Code			▼	

Red box highlights the 'Target Code' field. Red arrow points to the 'Source Code' field.

Tables (cont.)

You can also click the **View HL7 message** Action Column button if you need to review the message to ensure you map it to the correct CGM webPRACTICE code. After viewing the HL7 message, click **Proceed** to return to the mapping screen.



The screenshot shows two overlapping windows titled "Interface Notifications - Unmapped Table Items" from "System Manager DB12 (12)".

The top window shows a table with the following data:

Connection	0001G	Recv Quantum DFT Test
Database	12	DB12
Table	MRTIC	Insurance

A red box highlights the "View HL7 message" button, with a red arrow pointing to the bottom window.

The bottom window shows the same table with an additional "Source Code" field containing "2SD". Below the table is a text area containing an HL7 message:

```

1 MSH.2: ^~\&
1 MSH.4: CGM_SEA33333333
1 MSH.6: CGMwebpmDFT
1 MSH.7: 20220907170949
1 MSH.9: DFT^P03
1 MSH.10: 1547661416
1 MSH.11: P
1 MSH.12: 2.3
2 EVN.1: P03
3 PID.1: 1
3 PID.2: 8a0096ed55c96f430155e52d5fd2039a
3 PID.3: 25821
3 PID.5: Mae^Daisy
3 PID.7: 19530312
3 PID.8: F
3 PID.11: 50 E MAIN^^phoenix^AZ^85003
3 PID.13: ^^^^^602^5551255~^NET^^
3 PID.15: en
3 PID.16: U
3 PID.22: U
4 PD1.11: Y
  
```

A red arrow points to the "Proceed" button at the bottom right of the bottom window.

Transactions

Upload Remits (*Transactions > Electronic Remittance Advice (ERA) > Upload Remits*)

In the v2023.4.0 update, the **Upload Remits** Action Column button was added and at that time we stated it was for Hosted clients only. That was incorrect as the function can be used by all clients. In addition, two new file types have been added, so you can now upload .dat or .edi files in addition to .txt and .835 file types.

Transaction Journals (*Transactions > Transaction Journals*)

The following reports were enhanced so you now have the option to print by **Accounting Date** or by **Service Date**.

- Procedure Journal
- Payment Journal
- Adjustment Journal
- Transaction Journals to Excel

Note: When you select to print by **Service Date**, any unallocated payments or adjustments will not be included in the reports and the reports should not be used for 'balancing' purposes.