



**CompuGroup™**  
Medical

**What's New in**

**CGM webPRACTICE™ v2025.1.0**

**Final Release Notes**

**February 05, 2025**

**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 v2025.1.0. 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 v2025.1.0 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
14	Load AMA CPT® Codes	Load the updated files if applicable
15	Import Fee Schedules	Load the updated files if applicable
15	Load the HCPCS Codes	Load the updated file if applicable
15	Import RVU Unit Values	Load the updated file if applicable
17	Daily Register	Update the Security Level or Password for the function if applicable

### Summary of Changes to Document

Preliminary Release Notes were released January 28, 2025

Section	Function	Added/Deleted/Revised
Billing	Print Statement Register	Revised – added a Note
System	Unposted Procedures Integration	Added
Transactions	Unposted Procedures – Filter	Added
General Enhancements	Superbill # Fields	Added

## General Enhancements

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### Excel Reports

The following **Excel** reports that have a CPT line present, have been updated to include a new **Encounter Proc ID** column (*usually the last column on the report*). This ID number is a unique ID for each cpt transaction.

#### Reports > Insurance Related Reports

- Denial Reports (by all sorting options)
- Denial and Adjustment Report to Excel
- Insurance Filing Report
- Insurance Never Filed
- Insurance Pend Reports (by all sorting options)
- Insurance Refile Reports (by all sorting options)

#### Reports > Insurance Related Reports > Insurance Statistical Reports

- Insurance Payment Analysis (by all sorting options)
- Insurance Procedure Analysis (by all sorting options)
  - Detailed Ins Proc Analysis by Type of Service excluded – no Excel option
- Statistical Denial Reports (by all sorting options)

#### Patient Listings

- New Patient/Follow-Up Reports (by all sorting options)
- Double Sorted New Patient/Follow-Up Reports (by all sorting options)

#### Reports > Aged Accounts Receivable (A/R) Reports

- Aged A/R Reports (by all sorting options)
- Sorted Aged A/R Reports (by all sorting options)

#### Reports > Transaction Journals

- Daily Register
- Transaction Journals to Excel

#### Corporate Reports

- Insurance Filing Report (*Corporate > Corporate Billing Functions > Insurance Billing Functions*)
- Transaction Journals to Excel (*Corporate > Corporate Transactions > Transaction Journals*)
- Daily Register (*Corporate > Corporate Transactions > Transaction Journals*)
- Denial reports (by all sorting options) (*Corporate > Corporate Reports > Ins Related Reports*)

## General Enhancements (cont.)

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### Log In Screen

If you regularly log in using different client numbers, the **Client Number** field has *autofill/autocomplete* enabled now so any previously entered client numbers will display, and you can quickly select one without having to type the full number. You will need to type in at least the first number of the client number to display the previously entered client numbers that start with that number.

### Superbill # Fields

The **Superbill** fields have been increased to allow up to 25 characters in the following functions.

- **Superbill Inquiry** (*Schedule menu and Transactions menu*)
- **Procedure Entry Function** (*Transactions*)
- **Encounter Edit** (*Patient > Change Patient Data > History - Edit Transactions*)
- **Edit an Encounter** (*Transactions*)

## Billing

### Invoice Management *(Billing > Invoice Management)*

If you have Invoice Billing activated on your system, this new function allows you to look-up, view, sort and reprint invoices. When you first access the function, a list of all invoices printed for the past 90 days will be displayed including:

- Invoice #
- Invoice Billing Acct #
- Account Name
- Dept Code – The code associated with the Invoice Billing account
- Purchase Order # (PO) - If one was included on the Invoice
- Invoice Date - The date the invoice was first printed
- Invoice Amount - The total amount owing when the invoice was first printed
- Invoice Balance - The current amount owing for the invoice
- Acct Balance - The total balance currently owing on the invoice billing account

Invoice Management									System Manager
									EASTSIDE MEDICAL (1)
									*** Filter Applied ***
									(From Printing Date = '09-11-2024', Type of Invoices = 'All', )
Invoice #	Acct #	Acct Name	Dept Code	PO #	Invoice Date	Invoice Amt	Invoice Balance	Acct Balance	
102024.11	26722	FLOWERS INTERNATIONAL	FLR	PO20240814FLR	10-24-2024	3350.00	3350.00	4125.00	
102024.12	26722	FLOWERS INTERNATIONAL	FLR	PO20240821	10-24-2024	300.00	0.00	4125.00	
102024.13	26722	FLOWERS INTERNATIONAL	FLR		10-24-2024	1550.00	775.00	4125.00	
102024.14	26729	Home Renovation	HR	POAN081424	10-24-2024	385.55	385.55	772.87	
102024.15	26729	Home Renovation	HR		10-24-2024	387.32	387.32	772.87	
102024.16	26733	Mountain House Renovation	MMH	POAN081524	10-24-2024	1010.30	1010.30	1010.30	
102024.6	26701	POPULAR TREE TRIMMERS	POP	PO55447788	10-24-2024	2325.00	2325.00	2325.00	
102024.7	26704	MH Construction,	MH	PO071923	10-24-2024	325.00	325.00	3604.19	
102024.8	26704	MH Construction,	MH	PO10162024	10-24-2024	1447.00	1447.00	3604.19	
102024.9	26704	MH Construction,	MH	PO82724	10-24-2024	147.00	147.00	3604.19	
112024.19	26746	PINTEREST	PIN		11-05-2024	345.00	345.00	407.32	
112024.22	26704	MH Construction,	MH		11-22-2024	710.55	710.55	3604.19	
112024.24	26698	XYZ CONSTRUCTION	XYZ		11-26-2024	925.00	925.00	925.00	
102024.10	26704	MH Construction,	MH		10-24-2024	525.00	525.00	3604.19	
112024.20	26777	MACYS	MAC		11-05-2024	10.00	10.00	10.00	

You can filter the results on the screen by using the **Add/Edit Filter** Action Column button.

### Invoice Management Filter

Invoice Number	<input style="width: 90%;" type="text"/>
From Printing Date	<input style="width: 20%;" type="text" value="09-11-2024"/> <input type="button" value="Through"/> <input style="width: 20%;" type="text"/> <input type="button" value=""/>
Invoice Billing Acct#	<input style="width: 90%;" type="text"/>
Display Invoices	<input type="radio"/> Paid <input type="radio"/> Owing <input checked="" type="radio"/> All
Purchase Order	<input style="width: 90%;" type="text"/>



## Billing (cont.)

### Print Statement Register (Billing > Print Statement Register)

Added a **Date/Time Generated** column, so the date and time the statement was printed/generated will display.

Dec 10, 2024		EASTSIDE MEDICAL Statement Register For 12-10-2024						Page 1
Guarantor	Name & Number	BG	Prev Bal	End Bal	Pat Bal	Prev Stm	Prev Pmt	Date/Time Generated
10	WADDELL, SANDRA	INS	0.00	724.58	769.58	12-03-24	01-08-18	12-10-2024 02:28:46PM
24	BENTLEY, SHARON K	BC	0.00	230.00	310.00	12-03-24	07-17-20	12-10-2024 02:28:46PM
50	ANDERSON, KELLY I	UHC	0.00	299.00	289.00	12-03-24	08-30-17	12-10-2024 02:28:46PM

The following column names were updated to make them clearer:

- **Pre Bal** was changed to **Prev Bal**
- **Pre Stm** was changed to **Prev Stm**
- **Pre Pmt** was changed to **Prev Stmt**

**Note:** This enhancement will only be effective for statement files generated after the v2025.1.0 update has been installed.

## Patient

### Transaction History Detail (Patient > Change Patient Data > Transaction History Detail)

The **Encounter Proc ID** now displays on the Transaction History Detail screen. This is a unique identifier representing the posted procedure code.

Transaction History for 26620 - Fox, Iris			
Accounting Date	11-05-2022	Service Date	11-05-2022
Procedure Code	99214 - OV EST LEV 4	ICD-9:	0
Procedure Amount	325.00 (1@325.00)	ICD-10:	W53.11XA
Per Dr/Ins Dr	1 - CATHY CASTNER, MD, DO/1	Encounter ICD-9	0
Location	1 - MAIN OFFICE	DX's	
Department		Encounter ICD-10	W53.11XA
Ref Dr	ALT - MICHAEL A. ALTAMURA, MD	DX's	
Alt. Desc.		Sup#:	Ins: H
		Batch:	Asgn: Y
		Amount Remaining	\$ 325.00
		Claim Hold Date:	
		Claim Hold Reason:	
		Invoice #:	
		Encounter Proc ID:	11336  28185

### History - Transaction History Detail (Patient > Change Patient Data – History (Transaction History Detail))

After an electronic statement file has been sent, new **Statement Sent Date** and **Statement File** name fields will display above the **View Statement** field when viewing **Statement Sent** adjustment codes.

Transaction History for (50 - ANDERSON, KELLY I)			
Accounting Date	12-10-2024	Adjustment Date	12-10-2024
Adjustment Code	STM - STATEMENT SENT		
Adjustment Amount	0.00		
		Amount Remaining	\$ 0.00
		Claim Hold Date:	
Alt. Desc.	STATEMENT SENT-File	Claim Hold Reason:	
		Invoice #:	
Stmt Sent	12-10-2024		
Stmt File	20241210.1S		
View Statement	(ST)		

Acct Date ▲	Date	Code	Description	Dr	Lc	Diagnosis	Amount	Applied I	Img

## Patient (cont.)

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### Patient Registration (*Patient > Patient Registration*) and

### Change Patient Data – Insurance (*Patient > Change Patient Data - Insurance*)

When you register a new patient or edit/add an insurance policy for an existing patient, if the insurance carrier's **Default Billing Group** differs from the Billing Group stored on the patient's account, you will be asked if you want the Billing Group changed on the patient's account. For additional information, see the *Maintain Insurance Carriers* note in the *Tables* section of these release notes.

#### Notes:

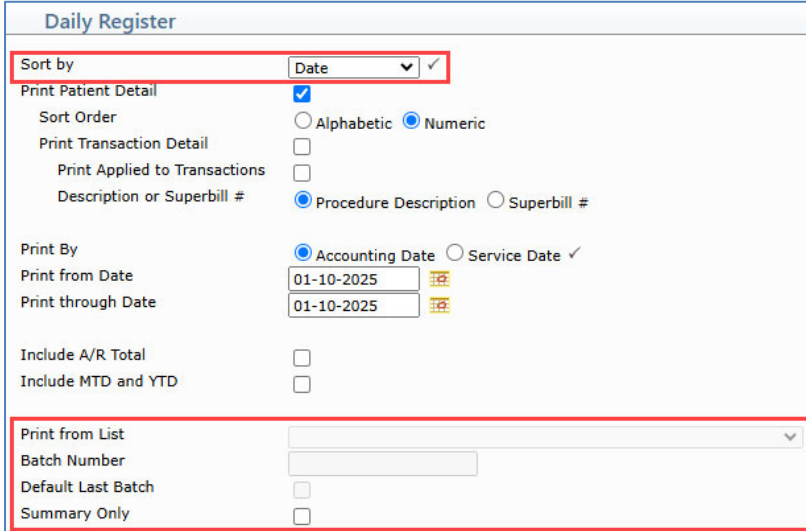
- This only applies to Primary Insurance Policies.
- This does not apply to Insurance Policies marked as Special Billing.
- This does not apply to terminated policies.
- For family and linking databases, the system asks if the Billing Group for other family members with the same insurance policy should be updated. If no family members have the same policy or they are already set to the Billing Group of the insurance carrier, the system won't ask anything.
- If the **Default Billing Group** for the insurance carrier has a security level (defined in the *Billing Group Table*) higher than the user who is registering editing an existing account, the user will get a message stating: "Your security level does not permit you to select this Billing Group.", and no changes to the Billing Group will be made.

## Corporate

### Daily Register (Corporate > Corporate Transactions > Transaction Journals > Daily Register)

The following enhancements have been made to the report:

- The check boxes for **Print in Date Order**, **Per Dr Order**, **Ins Dr Order**, **Location Order**, **User Order**, and **Group Order** have been consolidated into one **Sort by** list box. You can now only select one option to **Sort by**.
- A new **Summary Only** check box has been added which allows you to print only the summary of the report. The **Print from List**, **Batch Number** and **Default Last Batch** fields are disabled since they are database specific and don't apply to Corporate.
- Previously, the report would only print a Summary. The new version will print Detail or Summary.



**Daily Register**

Sort by: Date ✓

Print Patient Detail:

Sort Order:  Alphabetic  Numeric

Print Transaction Detail:

Print Applied to Transactions:

Description or Superbill #:  Procedure Description  Superbill #

Print By:  Accounting Date  Service Date ✓

Print from Date: 01-10-2025

Print through Date: 01-10-2025

Include A/R Total:

Include MTD and YTD:

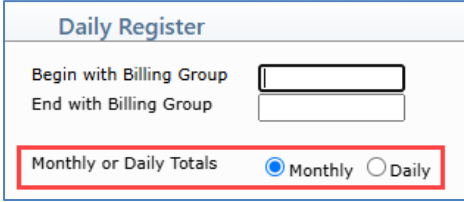
Print from List: [disabled]

Batch Number: [disabled]

Default Last Batch: [disabled]

Summary Only:

- When printing by **User Code** or **Billing Group** a new **Monthly or Daily Totals** option has been added.



**Daily Register**

Begin with Billing Group: [text box]

End with Billing Group: [text box]

Monthly or Daily Totals:  Monthly  Daily

- The Patient/Guarantor column was only printing the Guarantor in Family Billing databases. This column will now print both the patient and guarantor names. If the patient's relationship to guarantor is Self, only the Patient's name will print.
- When the report is not printed to Excel, only the first two modifiers print due to space restrictions (this was not a change). If you want to print all possible modifiers, you must print to Excel.

## Corporate (cont.)

- Only the following fields on the lead-in screen apply when printing to Excel, since the report automatically includes patient and transaction detail.

Print By	<input checked="" type="radio"/> Accounting Date	<input type="radio"/> Service Date ✓
Print from Date	<input type="text" value="01-07-2025"/>	
Print through Date	<input type="text" value="01-07-2025"/>	

- The following three columns have been added to the Excel version of the report and they only apply to payment and adjustment rows:
  - Applied To DOS
  - Applied To Code
  - Applied To Description.

## System

### Invoice Billing Integration (*System > Database Maintenance Menu > Integrations > Invoice Billing Integration*)

A new **Exclude \$0.00 Items on Reports** check box allows you control whether the \$0.00 transactions posted to patient accounts print on the Daily Register, Daily Register to Excel, Procedure Journal and Transaction Journals to Excel – Procedures.

### Column Selectable Fields (*System > Database Maintenance Menu > Column Selectable Fields*)

A new **CGM webPAY Pmt ID** column is available to display on the *Unposted Payments* screen. If you want the **CGM webPAY Pmt ID** column to display, after accessing this function, select **Unposted Payments**, select your **User Code** and add a **Sequence** number for the **CGM webPAY Pmt ID** column. For additional information, see the *Unposted Payments* entry and the *Transaction Journals* entry in these release notes.

### Unposted Procedures Integration (*System > Database Maintenance Menu > Integrations > Transactions Integrations > Unposted Procedures Integration*)

A new **Maximum # of Encounters to Display** field has been added. The field will be blank by default and cannot exceed 9999. For additional information, see the *Unposted Procedures – Filter* entry in the *Transactions* section of these release notes.

Unposted Procedures Integration	
Post Button - Auto-post Co-pays	<input checked="" type="checkbox"/>
Manual Posting - Auto-post Co-pays	<input checked="" type="checkbox"/>
Check for Duplicate Transactions	<input type="checkbox"/>
Display DMS Hospital Note	<input type="checkbox"/>
Maximum # of Encounters to Display	<input type="text"/>

## Tables

### Maintain Procedure Codes (Tables > Procedure Code Table > Maintain Procedure Codes)

A **Flat Fee** check box has been added, so you can indicate if the procedure code should be billed as a flat fee regardless of the number of units entered.

Maintain Procedure Codes			
Procedure Code	<input type="text" value="36415"/>	✓	
Procedure Description	<input type="text" value="COLL VENOUS BLD VENIPUNCTURE"/>		
Brief Description	<input type="text" value="BLOOD DRAW"/>		
Type of Service	<input type="text" value="1"/>	<input type="text" value="MEDICAL CARE (1)"/>	✓
Bill to Insurance	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Paper ✓		
Accept Assignment	<input type="checkbox"/>	Take Home Supply	<input type="checkbox"/>
ADA Code	<input type="checkbox"/>	Outside Lab	<input type="checkbox"/>
Immunization Code	<input type="checkbox"/>	Mammography Code	<input type="checkbox"/>
Requires NDC	<input type="checkbox"/>	Include 0.00 Procedure on Claim	<input type="checkbox"/>
NDC Code	<input type="text"/>		
Normal Price \$	<input type="text" value="10.00"/>	Facility Price \$	<input type="text" value="5.00"/>
# of Base Units	<input type="text"/>	Post-Op Days	<input type="text" value="0"/>
			<div style="border: 2px solid red; padding: 2px; display: inline-block;">           Flat Fee <input checked="" type="checkbox"/> </div>

The following functions have been updated to accommodate this new option.

- Transactions > Procedure Entry Function
- Transactions > Quick-Post
- Transactions > Unposted Procedures
- Transactions > Pre-Treatment
- Schedule > Enter Patient Appointments – E-Superbill
- Schedule > Patient Check In/Out – E-Superbill

### Maintain Department Codes (Tables > Department Code Table > Maintain Department Codes)

The **Department Code** field has been increased to allow up to ten characters.

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

#### \*\*Action Required\*\*

The 2025 CPT codes are available.

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

#### \*\*Action Required\*\*

The 2025 **PLA** CPT codes effective 01/01/2025 are available. The PLA codes are Pathology and Lab Specific CPT Codes and can be loaded by selecting the **Pathology and Lab** code category.

## Tables (cont.)

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

Updates to the 2025 HCPCS data files, effective January 1, 2025, are available. To receive the updated codes, you must load the 2025 file.

### **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 2025 Medicare Relative Value Unit files (RVUs) effective January 1, 2025. To receive the updated codes, you must load the **2025** file.

### **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:

- 2025 Medicare Physician Fee Schedule, effective January 1, 2025.
- 2025 Medicare DME Fee Schedules; Prosthetics/Orthotics and Supplies (DMEPOS), effective January 1, 2025
- 2025 Medicare Clinical Laboratory Fee Schedule, effective January 1, 2025

The updated files are available for import by selecting 2025 in the **Fee Schedule Year** list and the applicable file name in the **Fee Schedule File** list.

### **Maintain Doctor Codes** (*Tables > Doctor Code Table > Maintain Doctor Codes*) and

### **Maintain Group Taxonomy Numbers** (*Tables > Doctor Code Table > Provider Number Table > Group Taxonomy Number Table > Maintain Group Taxonomy Numbers*)

The updated Taxonomy Codes, effective January 1, 2025, have been released.

## Tables (cont.)

### Maintain Insurance Carriers (Tables > Insurance Carrier Table > Maintain Insurance Carriers)

A new **Default Billing Group** field has been added, so that whenever an insurance policy is changed or added you will be asked if you want the Billing Group changed on the patient’s account. In addition, the **Liability/Default Pmt%** field was moved to the right and the **DME Place of Service** field was moved to the left. For additional information, see the *Patient Registration* and *Change Patient Data – Insurance* notes in the *Patient* section of these release notes.

Maintain Insurance Carriers
EAS

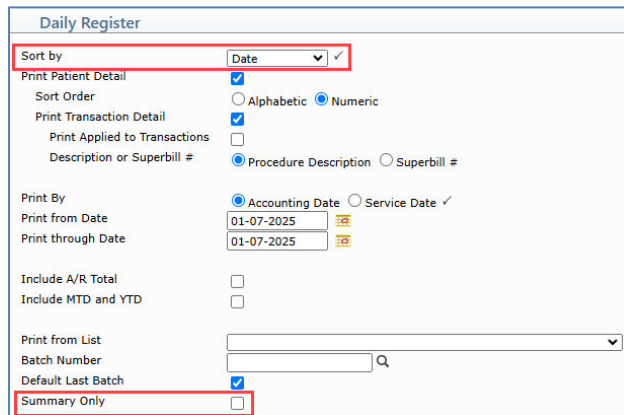
Insurance Carrier Code	MED <input checked="" type="checkbox"/>		
Insurance Carrier Name	MEDICARE <input checked="" type="checkbox"/>		
Address Line One	114 Webster St		
Address Line Two			
Zip	24901-1624		
City	Lewisburg		
State Code	West Virginia (WV) <input type="checkbox"/>	Validate Address <input checked="" type="checkbox"/>	
Country Code	UNITED STATES (US) <input type="checkbox"/>	Subdivision	<input type="checkbox"/>
Payer Tax ID #			
Contact Individual	JOAN DOE		
Telephone Number	877-908-8431	Fax	555-555-5555
E-mail Address			
Website	www.cms.gov		
Insurance Form	Medicare (C) <input checked="" type="checkbox"/>	Default PCP Dr for Ref Dr	<input type="checkbox"/>
Electronic Form Number	Medicare (30) <input checked="" type="checkbox"/>	UB Payer	<input checked="" type="checkbox"/>
Default Insurance Type	Medicare (MC) <input type="checkbox"/>	Force UB Claim to Paper	<input type="checkbox"/>
Claim Filing Indicator	Medicare Part B (MB) <input type="checkbox"/>	E-Secondary	<input checked="" type="checkbox"/>
Equivalent Ins. Code	2 MEDICARE (2) <input checked="" type="checkbox"/>	EPSDT Carrier	<input type="checkbox"/>
Insurance Class Code	<input type="checkbox"/>	Do not Bill to Insurance	<input type="checkbox"/>
Fee Schedule (Allowable)	SLIDE SLIDE (SLIDE) <input type="checkbox"/>	Auto Post Sec Adj	<input checked="" type="checkbox"/>
Plan Code	MED MEDICARE PLANS (MED) <input type="checkbox"/>		
Default Payment Code	MED MEDICARE PMT <input type="checkbox"/>		
Policy # Format	NNNNNNNNA, [MBI], [HICN]		
Auth Required	<input checked="" type="checkbox"/>	Expected Pmt Days	20
Medigap Provider #	MG	Timely Filing Limit	180
Electronic ID#	08202	Follow Up Letter	<input type="checkbox"/>
UB Electronic ID#		DME Place of Service	HOME (12) <input type="checkbox"/>
Additional Payer ID#	MED-01	Liability/Default Pmt%	100 <input type="checkbox"/>
HPID		Default Billing Group	<input type="checkbox"/>

## Transactions

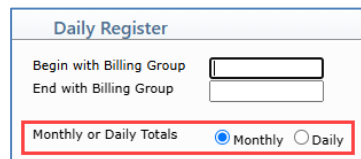
### Daily Register (*Transactions > Transaction Journals > Daily Register*) **\*Action Required\***

The following enhancements have been made to the report:

- The check boxes for **Print in Date Order, Per Dr Order, Ins Dr Order, Location Order, User Order,** and **Group Order** have been consolidated into one **Sort by** list box. You can now only select one option to **Sort by**.
- A new **Summary Only** check box has been added which allows you to print only the summary of the report.






- When printing by **User Code** or **Billing Group** a new **Monthly or Daily Totals** option has been added.



- The Patient/Guarantor column was only printing the Guarantor in Family Billing databases. This column will now print both the patient and guarantor names. If the patient's relationship to guarantor is Self, only the Patient's name will print.
- When the report is not printed to Excel, only the first two modifiers print due to space restrictions (this was not a change). If you want to print all possible modifiers, you must print to Excel.
- You can now print the Daily Register to Excel from within this function and the separate *Daily Register to Excel* function has been removed.
- The following three columns have been added to the Excel version of the report and they only apply to payment and adjustment rows:
  - Applied To DOS
  - Applied To Code
  - Applied To Description.

## Transactions (cont.)

- Only the following fields on the lead-in screen apply when printing to Excel, since the report automatically includes patient and transaction detail.

Print by	<input checked="" type="radio"/> Accounting Date	<input type="radio"/> Service Date
Print from date	<input type="text" value="12-18-2024"/>	
Print through date	<input type="text" value="12-18-2024"/>	
Print from list	<input type="text"/>	
Batch Number	<input type="text"/>	
Default Last Batch	<input checked="" type="checkbox"/>	

**Note: Action Required** - If you had security or a password on the *Daily Register to Excel* function, you would need to set up the *Daily Register* with those same settings, since the *Daily Register* now contains the *Print to Excel* option.

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

A new **Proc-EncounterProcID** data element is now available, which is a unique identifier representing the posted procedure code.

### Unposted Procedures (*Transactions > Unposted Procedures*)

A new CGM webCODER status symbol has been added to indicate if the procedures were not code checked because the account has no primary insurance. For additional details, see the *CGM webCODER Integration* entry in the *System* section of these release notes.

Unposted Procedures				
<input type="checkbox"/>	Sta	Source	Account	Patient Name
<input type="checkbox"/>	○	Interface	25755	KERSTEN, SALLY

### Unposted Payments (*Transactions > Unposted Payments*)

A new **CGM PAY Pmt ID** column is available to display on the *Unposted Payments* screen and will also print when using the **Print to Excel** Action Column button. For additional information, see the *Column Selectable Fields* entry and the *Transaction Journals* entry in these release notes.

## Transactions (cont.)

### Check In/Out Payment Journal (Transactions > Transaction Journals > Check In/Out Payment Journal)

A formatting change was made to the report totals when you select 'Print Here', to better accommodate handling payment method and device names. The individual totals for each device and payment method now print below the 'Total' heading.

Acct	Patient Name	Date	Pmt Type	Pmt Method	Pmt Code	User Code	Loc Code	Date Posted	Check#	Amount	Different Amt Posted
26615	RABBIT, SALLY	11-22-2024	COP	WP-Device	CGM webPAY	CVISA	MGR	1		20.00	
25852	JONES, JENNY	11-22-2024	COP	WP	CGM webPAY	CMC	MGR	1		30.00	
26638	Deer, Fred	11-22-2024	COP	WP-Device	CGM webPAY	CVISA	MGR	1		30.00	
26699	FOX, FRED	11-22-2024	COP	WP	CGM webPAY	ACHC	MGR	1		40.00	
Totals for Date (11-22-2024):											
WP										70.00*	
WP-Device Front Office Device 1										50.00*	
Grand Totals For Date (11-22-2024)										120.00**	
Total # Patients:										4	
Grand Total for all Dates:											
(WP)										70.00*	
(WP-Device Front Office Device 1)										50.00*	
Grand Total # Patients:										4	

End of Report. Transactions/Journals/Check In Out Payment Journal  
Requested by MGR and completed at 1:30PM on Nov 25 2024

### Unposted Procedures - Filter (Transactions > Unposted Procedures)

A new **Maximum # of Encounters to Display** field has been added.

**Unposted Procedures Filter**

Performing Doctor:

Insurance Doctor:

Location:

Department:

Billing Group:

Primary Ins Carrier:

Eligibility Status:

From Date of Service:  Through

From Superbill Number:  Through

Date Entered:

**Maximum # of Encounters to Display: 1000**

If you store a value in the **Maximum # of Encounters to Display** field in the *Unposted Procedures Integration*, this field will default to that value and will only display that quantity of encounters, but you can change it as needed. For additional information, see the *Unposted Integration Filter* entry in the *System* section of these release notes.

Sta	Source	Account	Patient Name	Superbill	DOS	CPT	Procedure Description	Billing Group	Amt
*** Filter Applied *** (Displaying the first 1000 of 6415 encounters)									
<input type="checkbox"/>	File	10	TWILLA, GENEVA		02-01-18	99214	OFFICE O/P EST MOD 30 MIN	BC	135.00
CGM webCODER Validation Failed. One or more Authorization attachments may be required.									
<input type="checkbox"/>	E-Superbill	23936	ANDERSON, ANDY	77.8	09-09-21	99211	THIS IS A NOTE	BS	26.00
CGM webCODER Validation Failed. One or more Authorization attachments may be required. Diagnosis/CPT cross-linking table error 99212 for Diagnosis E08.00.									

## CGM webTOOLS

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### **CGM webCODER Integration** (*System > Database Maintenance Menu > Integrations > CGM webTOOLS Integrations > CGM webCODER Integration*)

A new **Exclude Pt Accts with no Primary Ins** check box has been added, so you can select if you want accounts that do not have a Primary Insurance or if the Primary Insurance is not set to 'Y' for **Bill this Carrier** to not automatically have their codes checked.

This applies to procedures coming in from:

- Interfaces
- E-Superbill
- Charge Import Utility
- Procedures entered in Procedure Entry (for users that have *Check Codes on Save* selected in the *CGM webCODER Integration* function)

By default, the **Exclude Pt Accts with no Primary Ins** check box is selected. If you want to Check Codes for accounts with no primary insurance when this option is selected, you can click the **Check Codes** Action Column button when in *Procedure Entry*. For additional details, see the *Unposted Procedures* entry in the *Transactions* section of these release notes.

### **CGM PAY**

CGM webPAY has been renamed CGM PAY throughout the system.

### **CGM PAY**

**Transaction Journals** (*Transactions > Transaction Journals*) and

**Transaction Journals** (*Corporate > Corporate Transactions > Transaction Journals*)

The **CGM PAY Pmt ID** that prints on every receipt has been added to the following reports to allow users to better reconcile payments at the end of the day:

- Unposted Payments Journal (Print Here)
- Daily Register (Excel)
- Corporate Daily Register (Excel)
- Transaction Journals to Excel (Payment)
- Corporate Transaction Journals to Excel (Payment)
- Check In/Out Payment Journal (Print Here and Excel reports)

For additional information, see the *Unposted Payments* entry and the *Column Selectable Fields* entry in these release notes.