



CompuGroup™
Medical

What's New in

CGM webPRACTICE™ v7.4.29

Final Release Notes

November 11, 2020

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 v7.4.29. 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.7.4.29 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
13	Import Fee Schedules	Load the updated files if applicable
13	Load the HCPCS Codes	Load the updated files if applicable
13	Import RVU Unit Values	Load the updated files if applicable
13	Load ICD-10-CM Codes	Load the updated files if applicable
9	Aged A/R by Billing Group and Summary Aged A/R by Billing Group	Change the default option for the Include Billing Groups by field if applicable

Summary of Changes to Document

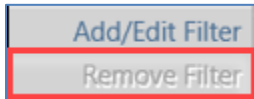
Version 1 of Preliminary Release Notes to be released November 3, 2020.

Section	Function	Added/Deleted/Revised
No Updates added		

General Enhancements

Add/Edit Filter and Remove Filter Action Column buttons

Updated every function that contains Filter functionality, so they all work consistently and display *Filter Applied* text in the same format throughout the system. In addition, the **Remove Filter** Action Column button will be inactive now and display in gray text if a Filter has not been applied.



Note: The *Import and Post ERA Files* and *Patient Check In/Out* functions only received partial updates due to their unique functionality.

Patient Look-up Screen

Added **Doc**, **Loc**, and **Grp** columns. Previously, only two of the three columns would display based on which two options were selected in the *CGM webPRACTICE Default Values* function. For additional information, see the *CGM webPRACTICE Default Values* entry in the *System* section of these release notes.

System Manager
EASTSIDE MEDICAL (1)

Change Patient Data

Account #: SSN: Policy: Pt Identifier:
 Last Name: DOB: Doctor: Check #:
 First: Phone #:

Account	Patient	Guarantor	Master	Doc	Loc	Grp	Balance
	Phone	Comment	Diag			DOB	
25996	ANDERSON, ALEXIS	ANDERSON, ALEXIS	0	1	GSI	BP	0.00
						01-27-2001	
23936	ANDERSON, ANDREW (ANDERSON, ANDY) (602) 555-5555	ANDERSON, ANDREW PATIENT HARD OF HEARING!	#	1	1	MED	-222.01
						01-27-1942	

Print Labels

The name of the **Print Labels** Action Column button has been changed to **Print DYMO Labels** in the following functions, to clearly identify that this function only works for DYMO label printers.

- Patient Summary Screen (*Patient > Change Patient Data > Patient Summary Screen*)
- Enter Patient Appointments (*Schedule > Enter Patient Appointments*)
- Patient Check In/Out (*Schedule > Patient Check In/Out*)

If you click **Print DYMO Labels** and the DYMO software is not installed on the workstation, a warning message will display stating, *'DYMO software not detected on this workstation'*.

Billing

Automatic Line Item Write-Off by Billing Group or Performing Doctor (*Billing > Insurance Billing Functions > Automatic Line Item Write-Off > Automatic Line Item Write-Off*)

Updated the function so that when you first access it, the lead-in screen will now be the standard Batch Number screen.

Automatic Line Item Write-Off by Billing Group	
Batch Number	<input type="text"/> <input type="button" value="Q"/>
Default Last Batch	<input type="checkbox"/>

After you select a Batch Number (if applicable) and proceed to the next screen, the **Batch Number** field has been replaced by an **Accounting Date** field; an **Adjustment Date** field has been added, in addition to three batch information fields.

Automatic Line Item Write-Off by Billing Group	
All or Select Billing Groups	<input checked="" type="radio"/> All <input type="radio"/> Select
Billing Group	<input type="text"/> <input type="button" value="Q"/> <input type="text"/>
Include Billing Groups by	<input checked="" type="radio"/> Account <input type="radio"/> Transaction
Include Patient Balances	<input type="checkbox"/>
Include Patient Collection Balances	<input type="checkbox"/>
Include Insurance Balances	<input type="checkbox"/>
For Aging Days Over	<input type="text" value="60"/> <input checked="" type="checkbox"/>
For Balances Under \$	<input type="text" value="2.49"/> <input checked="" type="checkbox"/>
No Payment since what date	<input type="text" value="09-21-2020"/> <input checked="" type="checkbox"/>
Adjustment Code	<input type="text"/> <input checked="" type="checkbox"/> <input type="button" value="Q"/> <input type="text"/>
Accounting Date	<input type="text" value="09-15-2020"/> <input type="button" value="Q"/> Batch Number: 09152020
Adjustment Date	<input type="text" value="09-15-2020"/> <input checked="" type="checkbox"/> Batch Total: 0 Batch Posted: 09-15-2020

Collections

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

Updated the function so that when you first access it, the lead-in screen will now be the standard Batch Number screen.

Automatic Patient Collection Balance Write-Off

Batch Number

Default Last Batch

After you select a Batch Number (if applicable) and proceed to the next screen, the **Batch Number** field has been replaced by an **Accounting Date** field; an **Adjustment Date** field has been added, in addition to three batch information fields.

Automatic Patient Collection Balance Write-Off

All or Select Collection Statuses All Select

Collection Status

For Balances Under \$ ✓

No Payment Since ✓

Transfer to Billing Group

Write-Off Internal Comment

Overwrite or Append Comment Overwrite Append

Adjustment Code ✓

Accounting Date Batch Number: 09152020

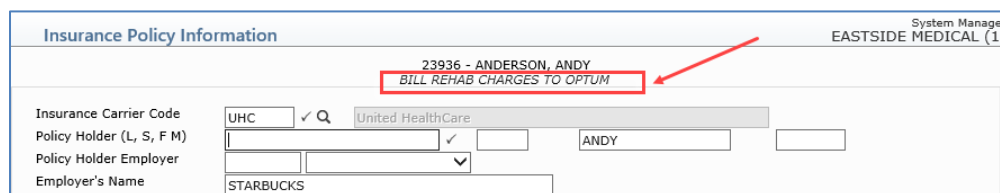
Adjustment Date Batch Total: 0 Batch Posted: 09-15-2020

Patient

Change Patient Data

Insurance - Add a Policy (*Patient > Change Patient Data > Insurance*)

Any **Comments** stored for the insurance carrier will now display at the top of the Insurance Policy screen when adding new policies, if the **Display Ins Carrier Comments in Ins Policy Screen** check box in the *CGM webPRACTICE Default Values* function is selected. For additional information, see the *CGM webPRACTICE Default Values* entry in the *System* section of these release notes.



Insurance Policy Information System Manager
EASTSIDE MEDICAL (1)

23936 - ANDERSON, ANDY
BILL REHAB CHARGES TO OPTUM

Insurance Carrier Code: UHC Q United HealthCare

Policy Holder (L, S, F M): ANDY

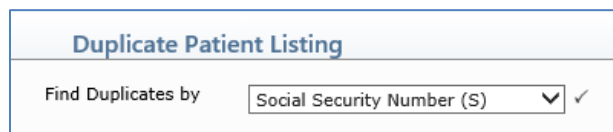
Policy Holder Employer:

Employer's Name: STARBUCKS

Duplicate Patient Listing (*Patient > Patient Listings > Duplicate Patient Listing*)

With this new report so you can easily find duplicate patient accounts within the system. Upon accessing the function, you can select the data element to use to identify duplicate patient accounts:

- Social Security Number
- Date of Birth and Last Name
- Primary Policy Number
- Patient Identifier



Duplicate Patient Listing

Find Duplicates by: Social Security Number (S)

If you select **Patient Identifier**, the **Primary Policy Number** column is replaced with the **Patient Identifier**.

Sep 23, 2020		EASTSIDE MEDICAL						Page 1
Duplicate Patient Listing								
Duplicates identified using Social Security Number								
Acct #	Patient Name	SSN	Birth Date	Policy	Street Address	City	State	Balance
25707	TIM , TINY	106-85-0896	03-04-1964	927836483	3300 N Central Ave	Phoenix	AZ	0.00
25717	LYALL LMT, MARTHA E	106-85-0896	09-07-1978	W166151298	5808 W HIGHLAND AVE	PHOENIX	AZ	0.00
25770	CONLEY RN, HOPE CHAR	106-85-0896	09-07-1978	W16615129801	46 BROOKFIELD DR	WALKILL	NY	-66.00
25905	Perry, Katy	106-85-0896	01-01-1981	654351351	4414 N 111th Ln	Phoenix	AZ	136456.00
25906	Brand, Russe11	106-85-0896	01-01-1972	654654654	3300 N Central Ave	PHOENIX	AZ	-236.70
25498	BOWMAN, ARNOLD	111-22-2522	01-27-1978	927836483	1038 E MAIN ST	PHOENIX	AZ	0.00
26165	RASHTON, MOLLY	111222522	10-10-1985	XY2126578893				0.00
112	GOMEZ, ARLYN	111-22-3333	01-02-1983	111223333	1234 SW 56ST	MIAMI	FL	-1.00
26104	Smith, Beth	111-22-3333	01-02-1980	56461531	3300 N CENTRAL AVE S	PHOENIX	AZ	2275.39
25661	Jones, Emma	123-45-6777	02-10-1980	1234512345	3300 N Central Ave	Phoenix	AZ	0.00
49958	THOMPSON, SARAH	123-45-6777	10-21-1969	123456777	3300 N CENTRAL AVE	Phoenix	AZ	0.00

You can also print this report to *Excel via MyReports* if you want to perform additional sorting or filtering.

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.

- Table 6A - Selected Diagnosis and Services Rendered
- Table 6B - Quality of Care Measures
- Table 3B - Demographic Characteristics

Aged A/R by Billing Group and **Summary Aged A/R by Billing Group** *****Action Required*****

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

(*Reports > Aged Accounts Receivable (A/R) Reports > Summary Aged A/R Reports > Summary Aged A/R by Billing Group*)

Added **Include Billing Groups by** field with options for **Account** and **Transaction**, so you can select which Billing Group you want to use for the report. The **Account** option uses the Billing Group stored in the Patient's *Billing Information* screen and the **Transaction** option uses the Billing Group stored for the individual charges.

Aged A/R by Billing Group	
Begin with Billing Group	<input type="text"/>
End with Billing Group	<input type="text"/>
Include Billing Groups by	<input type="radio"/> Account <input checked="" type="radio"/> Transaction ✓
Print Detail of Guarantor	<input checked="" type="checkbox"/>
Alpha, Numeric, or High Balance	<input type="radio"/> Alphabetic <input checked="" type="radio"/> Numeric <input type="radio"/> High Balance
Include Address Information	<input type="checkbox"/>

Note: The **Transaction** option is set as the default but you can change the default to **Account** if needed in the *Defaults, Fixed and Required Fields* function.

Reports (cont.)

Corporate Ins Related Reports (*Reports > Corporate Reports > Corporate Ins Related Reports*) *****New Funtionality*****

Added **Corporate Aged A/R for Insurance** reports with the following sorting options:

- > *Corporate Aged A/R for Ins by Billing Group*
- > *Corporate Aged A/R for Ins by Corporation*
- > *Corporate Aged A/R for Ins by Location*
- > *Corporate Aged A/R for Ins by Performing Dr*
- > *Corporate Aged A/R for Ins by Responsible Dr*

Added **Corporate Denial Reports** with the following sorting options:

- > *Corporate Denials by Billing Group*
- > *Corporate Denials by Insurance Carrier*
- > *Corporate Denials by Insurance Denial Reason*
- > *Corporate Denials by Location*
- > *Corporate Denials by Performing Dr*
- > *Corporate Denials by Practice Denial Reason*
- > *Corporate Denials by Procedure Code*
- > *Corporate Denials by Responsible Dr*

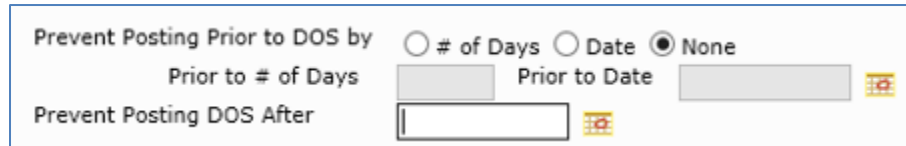
Notes: It is required for tables to be shared in order for the reports to function accurately. If tables are not shared:



- 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.

System

Procedure Entry Integration (System > Database Maintenance Menu > Integrations > Transactions Integrations > Procedure Entry Integration)

Added new options so you can prevent posting dates of service that are prior to a specified date or prior to the current date for a specified number of days. You can also prevent posting dates of service after a specified date. These fields are optional and will default blank.

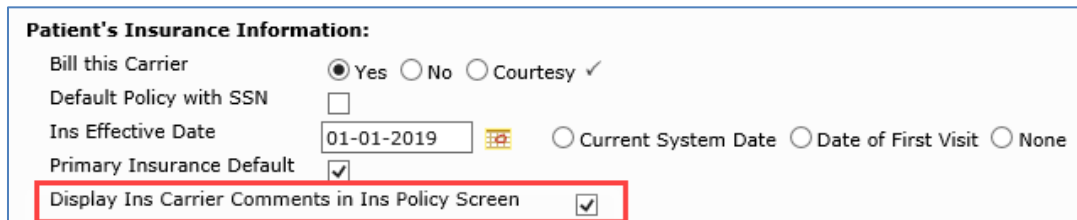



Prevent Posting Prior to DOS by # of Days Date None
 Prior to # of Days Prior to Date 
 Prevent Posting DOS After 

Warning messages have also been added to *Procedure Entry* and *Unposted Procedures* to notify you of any restriction(s), when you have entered values in these fields.

CGM webPRACTICE Default Values (System > Database Maintenance Menu > CGM webPRACTICE Default Values)

Added a **Display Ins Carrier Comments in Ins Policy Screen** check box, so you can select if you want any **Comments** stored for the insurance carrier to display at the top of the Insurance Policy screen when adding new policies. For additional information, see the *Insurance - Add a Policy* entry in the *Patient* section of these release notes.



Patient's Insurance Information:
 Bill this Carrier Yes No Courtesy ✓
 Default Policy with SSN
 Ins Effective Date  Current System Date Date of First Visit None
 Primary Insurance Default
 Display Ins Carrier Comments in Ins Policy Screen

CGM webPRACTICE Default Values (System > Database Maintenance Menu > CGM webPRACTICE Default Values)

Removed the **Dr, Loc or Billing Group** options from the *Patient Look-Up Screen* section, since they are no longer needed. For additional information, see the *Patient Look-Up Screen* entry in the *CGM webPRACTICE Enhancements* section of these release notes.

System (cont.)

Auto-Posting Payments Integration (*System > Database Maintenance Menu > Integrations > Transactions Integrations > Auto-Posting Payments Integration*)

Added a new **Allow Auto-Post to Procedures not tied to Appts** check box. If you select this option, any co-payments that **are** tied to appointments can now be auto-posted to procedures even when the procedures are not tied to an appointment. By default, this check box is not selected. This was added because some clients have procedures coming in from interfaces, which never include the appointment IDs, so the client could never auto-post any co-payments.

Auto-Posting Payments Integration	
Co-Payments:	
Allow Auto-Post to Create a Credit on Pt Acct	<input type="checkbox"/>
Allow Auto-Post if no Dr tied to the Payment	<input checked="" type="checkbox"/>
Restrict Auto-Post to Procedures Selected	<input type="checkbox"/>
Allow Auto-Post to Procedures not tied to Appts	<input type="checkbox"/>

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, 2020-September 30, 2021 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 2020 Medicare Relative Value Unit files (RVUs) effective October 1, 2020. To receive the updated codes you must load the **2020** file.

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

Updates to the 2020 HCPCS data files, effective October 1, 2020 are available for loading. To receive the updated codes you must load the **2020** file.

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

The Centers for Medicare and Medicaid Services (CMS) has released the following Fee Schedule:

- 2020 Medicare Physician Fee Schedule, effective October 1, 2020

The updated file is available for import by selecting 2020 in the **Fee Schedule Year** list and the applicable file name in the **Fee Schedule File** list.

Maintain Insurance Carrier Codes (*Tables > Insurance Carrier Table > Maintain Insurance Carrier Codes*)

Added **Default PCP Dr instead of Ref Dr** check box. When selected, the Primary Care Doctor on the patient's account will default into the **Ref Dr** field in *Procedure Entry* instead of the Referral Source code.

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

Renamed the Commercial Medicare option for the **Default Insurance Type** field to Commercial Medicare/Medicare Advantage (CM).

Insurance Form	Medicare (C) ▼	✓
Electronic Form Number	Medicare (30) ▼	✓
Default Insurance Type	Commercial Medicare/Medicare Advantage (CM) ▼	

Maintain Location Codes (*Tables > Location Code Table > Maintain Location Codes*)

Changed the **UB Type of Bill** field so you can enter any code up to four alphanumeric digits and no longer be restricted to codes contained in the table. Any **UB Type of Bill** codes previously entered for location codes will continue to be stored.