# What's New in

# CGM webPRACTICE™ v2023.1.0

# Preliminary Release Notes

**January 31, 2023**

**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 v2023.1.0. 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 v2023.1.0 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 |
|--------|----------|--------|
| 7 | Import RVU Unit Values | Load the updated files if applicable |
| 7 | Load the HCPCS Codes | Load the updated files if applicable |
| 9 | Import Fee Schedules | Load the updated files if applicable |
| 7 | Load the AMA CPT® Codes | Load the files if applicable |

## Summary of Changes to Document

Preliminary Release Notes to be released January 31, 2023

| Section | Function | Added/Deleted/Revised |
|---------|----------|-----------------------|
|  |  |  |
|  |  |  |

## Billing

**Create Insurance File – Paper Professional Claims** *(Billing > Insurance Billing Functions > Create Insurance File)*

When an **Outside Lab Attachment** has been stored for certain procedure line items contained in an encounter, the paper professional claim will now be split and include the following information on the claim for those outside lab procedures:

- Box 20 – Outside Lab check box will be marked 'Yes'.
- Box 23 – Prior Authorization Number will print the Ref Dr License # contained in the Attachment.
- Box 32 – Service Facility Location Information will print the Referral Source Name & Address for the code selected in the Attachment.

**Create Insurance File – Electronic Professional Claims** *(Billing > Insurance Billing Functions > Create Insurance File)*

When an **Outside Lab Attachment** has been stored for certain procedure line items contained in an encounter, the electronic professional claim will include the following information on the claim for those outside lab procedures:

- Loop 2420C – NM1*77 – As long as the NPI does not match the Claim Location NPI and the Referral Source Address Line 1 and 2 (from the code selected in the Outside Lab Attachment) does not match the Billing Address Line 1 and 2 (Loop 2010AA), this will populate the Referral Source Name & Address for the code selected in the Attachment.
- Loop 2400 – REF*F4 - will populate with the Ref Dr License # contained in the Attachment.

> **Notes**:
> - This change will not affect any existing profiles you have in the *5010 Loop and Segment Editor* containing values for Loop 2400 REF*F4.
> - Electronic claims do not have to be split for Outside Lab procedures.

## Collections

**Collection Menu Functions**

The Collection menu functions will no longer display when you are logged into a Collection database, so you don't inadvertently access them and encounter possible errors.

## Patient

**Change Patient Data**
**Insurance Policy Information** - **Eligibility History ***CGM webVERIFY Clients Only*****

The updated Services Type Codes, effective November 1, 2022, have been loaded.

## Reports

**User Productivity Report to Excel** *(Reports > User Productivity Report to Excel)*

The following items on the report were reworked to count the data based on the date the action occurred and not the Service Date of the transaction or the Appointment Date:

- **Claims Submitted-# of Paper** – Looks at the **Date Created** now instead of the **Date Sent**.
- **NOTES-# Entered** – Looks at the **Date Entered** now and not the **Transaction Service Date**.
- **INOTES-# Entered** – Looks at the **Date Entered** now and not the **Transaction Service Date.**
- **# of Trans Edited** – Looks at the **Date Edited** now and not the **Transaction Service Date.**
- **Pt Accts Edited/Inactivated** – Added **Inactivated** to the column heading and now include those accounts in the total.
- **Pt Appts Scheduled** – Looks at the **Date Scheduled** now and not the **Appointment Date**.
- **Pt Appts Rescheduled** – Looks at the **Date Rescheduled** now and not the **Appointment Date**.
- **Pt Appts Deleted** – Looks at the **Date the Appointment was deleted** now and not the **Appointment Date**.
- **# of Trans Reversed** – This was originally the **# of Trans Reversed/Negated** column but was separated to provide only the number of reversed transactions.
- **# of Trans Negated** – This was originally the **# of Trans Reversed/Negated** column but was separated to provide only the number of negated transactions.

## Schedule

**Eligibility Status** (*Schedule > Verify Eligibility > Eligibility Status*)
**Eligibility History** (*Schedule > Patient Check In/Out > Eligibility History*)
**\*\*\*CGM webVERIFY Clients Only\*\*\***

The updated Services Type Codes, effective November 1, 2022, have been loaded.

## System

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

The **Outside Lab Attachment** has been removed from the available **Claim Level Attachment** options, as it should only be available for service line items. For additional information, see the *Procedure Entry Function* release note under the *Transactions* section of these release notes.

## System (cont.)

**Column Selectable Fields** *(System > Database Maintenance Menu>Column Selectable Fields)*
A new **Reason** field has been added for the *Unposted Procedures* function, to display the **Claim Hold Reason** entered for the encounter. For additional information, see the *Unposted Procedures* release note under the *Transactions* section of these release notes.

**Merge Patient Accounts** *(System > File Maintenance Menu > Merge Patient Accounts)*
This function has been enhanced to include the merging of the Superbill numbers from the original patient account into the new patient account.

## Tables

**Maintain ANSI CARC/RARC Codes** *(Tables > ANSI CARC/RARC Table > Maintain ANSI CARC/RARC Codes)*
The updated Claim Adjustment Reason Codes (CARC) and Remittance Advice Remark Codes (RARC), effective November 1, 2022, have been released.

**Load the AMA CPT® Codes** *(Tables > Procedure Code Table > Load the AMA CPT® Codes)*
The 2023 CPT codes are available.

**Load the HCPCS Codes** *(Tables > Procedure Code Table > Load the HCPCS Codes)* **\*\*Action Required\*\***
Updates to the 2023 HCPCS data files, effective January 1, 2023, are available. To receive the updated codes, you must load the 2023 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 2023 Medicare Relative Value Unit files (RVUs) effective January 1, 2023. To receive the updated codes, you must load the **2023** file.
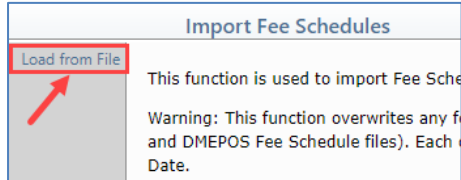
## Tables (cont.)

**Import Fee Schedules – Upload File** *(Tables > Fee Schedule Table > Import Fee Schedules)*
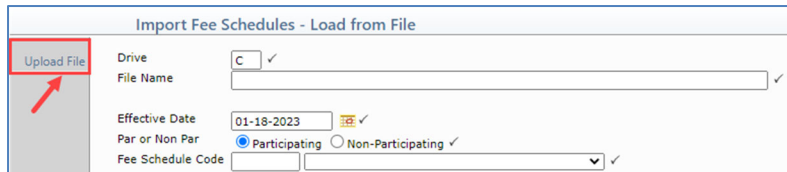A new **Upload File** Action Column button has been added, so you can upload fee schedule files from your workstation directly to the CGM webPRACTICE server without having to contact Customer Service for assistance.

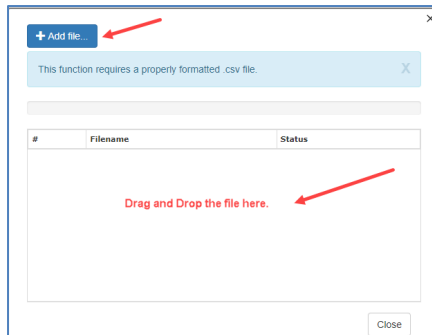When you first access the *Import Fee Schedules* function:
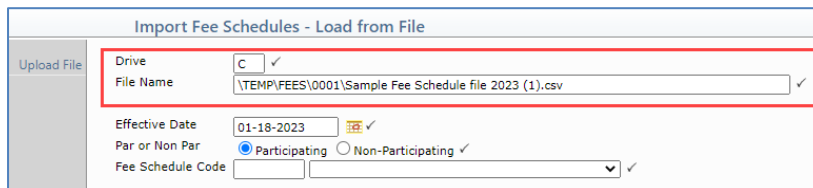
- Click **Load from File**



- Click **Upload File**



- Click **Add file** to select the file on your workstation or *Drag and Drop* the file into the window.



- After the file is uploaded, the **Drive** and **File Name** fields will automatically populate.



- At this point, complete the remaining three fields and click **Save** to import the fee schedule as usual.

## Tables (cont.)

**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:

- 2023 Medicare Physician Fee Schedule, effective January 1, 2023.
- 2023 Medicare DME Fee Schedules; Prosthetics/Orthotics and Supplies (DMEPOS), effective January 1, 2023.
- 2023 Medicare Clinical Laboratory Fee Schedule, effective January 1, 2023.

The updated files are available for import by selecting 2023 in the **Fee Schedule Year** list and the applicable file name in the **Fee Schedule File** list.

## Transactions

**Unposted Procedures – Add/Edit Filter** *(Transactions > Unposted Procedures)*

Added two **Superbill Number** fields to the Filter, so you can filter by a single superbill number or a range of superbill numbers. Also moved the **Date of Service** fields onto a single line.



**Import and Post ERA Files** *(Transactions > Electronic Remittance Advice (ERA) > Import and Post ERA Files)*

A new **Select All** check box has been added to the check box column. Selecting this check box selects all files in the list which makes it faster to perform actions on multiple files at a time. For example: you can archive all the files selected, without having to select the check box next to each file individually. Clearing this check box clears any selected files.



The Action Column functions will be active depending on the type of files you select. It is best if you use the filter options to display the specific types of files you want first, so when you click the **Select All** check box, they all qualify for the particular action you want to perform. For example, you could use the **Filter** to only display the files that have been **Posted**, so you can archive them.

**Note**: This new **Select All** check box is not available if you are using Edge in IE Mode.

## Transactions (cont.)

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

A new **Reason** Column has been added to display the **Claim Hold Reason** entered for the encounter. For additional information, see the *Column Selectable Fields* release note under the *System* section of these release notes.

**Procedure Entry Function – Outside Lab Attachment** *(Transactions > Procedure Entry Function)*

The **Outside Lab Attachment** has been removed from the claim level as it should only be used for service line items. For additional information, see the *Procedure Entry Integration* release note under the *System* section of these release notes.

> **Note**: This change will only be effective for encounters entered after the v2023.1.0 update has been installed. If the Outside Lab Attachment was stored at the claim level for any previously entered encounters, they will remain the same.