What's New in

CGM webPRACTICE™ v2023.2.0

Preliminary Release Notes

May 24, 2023

CGMwebPRACTICE™
Fully Web-Based Practice Management Suite

Table of Contents

INTRODUCTION

This document provides an overview of new features, resolutions, and enhancements available in the release of CGM webPRACTICE v2023.2.0. 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 v2023.2.0 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
20	Import RVU Unit Values	Load the updated files if applicable
20	Load the HCPCS Codes	Load the updated files if applicable
20	Load the AMA CPT® Codes	Load the files if applicable
17	Patient Look-Up Integration	Customize the search options you want to use

Summary of Changes to Document

Preliminary Release Notes to be released May 2, 2023

Section	Function	Added/Deleted/Revised

General Enhancements

Attach Image

The **Attach Image** Action Column button throughout the system, now allows the attaching of PDF documents.

> **Notes**:
> - The Attach PDF functionality is only available when using Google Chrome or Microsoft Edge - not Edge in Internet Explorer Mode. You can *view* PDF documents that have been previously attached to patient accounts if you are using Edge in Internet Explorer Mode, but you won't be able to **Attach** them.
> - The PDF functionality to scan and attach PDFs using Direct Scanning is not available yet. It is currently in development and expected to be available later this year. More details will follow at that time.

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
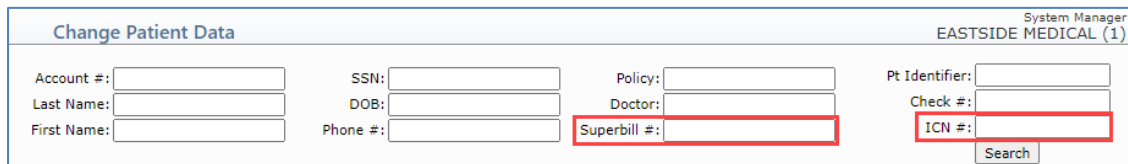- Guarantor Information
- Insurance Policy Information

Transactions > Transaction Batch Control > Create a Batch
Transactions > Transaction Batch Control > Edit a Batch
Transactions > Payment Entry Function

Patient Look-Up

Added two new search fields so you can look up patients by **Superbill #** and **ICN #**. The **First** field was also changed to **First Name**.

> **Note**: These new fields were not added when you access the Patient Referral functions, since those patients are not registered patients and would not have Superbill or ICN numbers.

Patient

Change Patient Data - History *(Patient > Change Patient Data > History)*

Resolved an issue when viewing an EOB attached to a payment. If the payment was manually posted and you clicked the EOB image icon to view the EOB, an auto-generated EOB would display instead of the EOB image attached to the payment.

Change Patient Data – Name and Address Information *(Patient > Change Patient Data > Name and Address Information)*

The following table options have been added or updated to accommodate UDS reporting requirements for the 2023 reporting year.

Race and **Race Other** tables

- Asian Indian
- Chinese
- Filipino
- Japanese
- Korean
- Vietnamese
- Other Asian
- Native Hawaiian
- Guamanian or Chamorro
- Samoan

Ethnicity table

- **Hispanic or Latino** is now **Another Hispanic, Latino/a or Spanish origin**
- **Not Hispanic or Latino** is now **Not of Hispanic, Latino/a or Spanish origin**
- Added **Mexican; Mexican American; Chicano/a**
- Added **Puerto Rican**
- Added **Cuban**

Patient (cont.)

Change Patient Data

Insurance Policy Information - Eligibility History **CGM webVERIFY Clients Only**

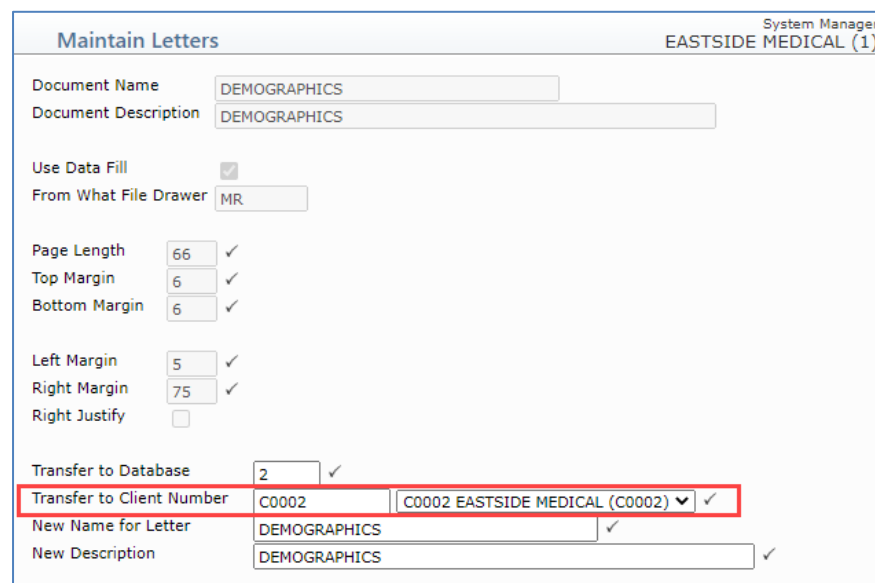The updated Services Type Codes, effective March 1, 2023, have been loaded. This is an update to the Service Type Health Benefit Plan codes, that are displayed in the results when **Eligibility** is verified for an insurance carrier. The code descriptions have been changed to the standard ANSI code list for the EB03 segment found in the 005010x279 Health Care Eligibility Benefit Inquiry and Response (270/271) implementation guide.

Reports

Maintain Letters *(Reports > Data Management System > DMS Letter Processor > Maintain Letters)*
The **Copy Letter** functionality has been enhanced so you can now copy DMS Letters to other Client Numbers in addition to other Database Numbers. This functionality only applies if you have multiple client numbers on your system and have been given the capability to change to other clients and databases.

After you access the DMS letter and click the **Copy** Action Column button, a new **Transfer to Client Number** field will display in the bottom section, so you can select which **Client Number** you want to transfer a copy of the letter into.

	System Manager
Maintain Letters	EASTSIDE MEDICAL (1)

Document Name	DEMOGRAPHICS
Document Description	DEMOGRAPHICS
Use Data Fill	✓
From What File Drawer	MR
Page Length	66 ✓
Top Margin	6 ✓
Bottom Margin	6 ✓
Left Margin	5 ✓
Right Margin	75 ✓
Right Justify	☐
Transfer to Database	2 ✓
Transfer to Client Number	C0002 C0002 EASTSIDE MEDICAL (C0002) ✓
New Name for Letter	DEMOGRAPHICS ✓
New Description	DEMOGRAPHICS ✓

> **Note**: The letter must not already exist in the target client/database because this function will not 'overwrite' an existing letter.

Transaction Detail to Excel *(Reports > Transaction Journals > Transaction Detail to Excel)*
Two new data elements were added for **Proc-Last Pmt ICN** and **Proc-Last Pmt ICN Amount**. These data elements will provide data for the last payment posted on the transaction that has an ICN number attached, from the insurance ledger on the patient's account.
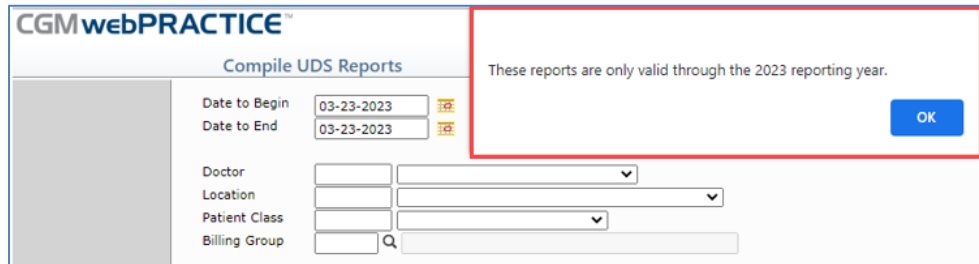
Reports (cont.)

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

Added two new data elements for **Proc-Modifier 3** and **Proc-Modifier 4**. In addition, the following data elements have been enhanced to print the applicable data even when there is not a balance owing on the line item.

Compile UDS Reports *(Reports > UDS Reports > Compile UDS Reports)*

The following message will now display when first accessing the function:

Reports (cont.)

Missing Charge Report *(Reports > Transactions Journals > Missing Charge Report)*

Enhanced the report so you can control how the report determines if there are missing appointments by adding the following options:

- **Include Unposted Procedures** – You can choose to match on only posted transactions or on both posted and unposted transactions.
- **Match on Location** – You can choose if the Location of the charges must match the appointment location.
- **Match on Type of Service** - You can choose if you want to match if there is a Type of Visit tied to the appointment AND there is a Type of Service associated with the Type of Visit, that the Type of Service of the charge must match the Type of Service of the appointment.

Also, an issue was resolved where if a patient account had appointments scheduled on the same day with different doctors or locations and if only one of the appointments had associated charges, they would not reflect correctly. The formatting of the report has also been enhanced to make it more readable and a new **Primary Ins** column was added that lists the primary carrier code and name for the patient.

```
Apr 21, 2023                         Eastside Medical                               Page 1
                                   Missing Charge Report
                                      For all Doctors
                                     For all Locations
                                   For all Types of Visits
                              From 01-01-2023 through 04-21-2023


Dr    Appt Date   Appt Time    Loc   Typ   Patient Name       Acct #    Status             Primary Ins
-----------------------------------------------------------------------------------------------------------
1 - CATHERINE CASTNER, NP
      02-21-2023   02:00 PM      1          ANDERSON, ANDY     23936     UNCON - UNCONFIRMED  GHI - Group Health Inco
      02-28-2023   01:30 PM      1          ANDERSON, ANDY     23936     UNCON - UNCONFIRMED  GHI - Group Health Inco
      03-22-2023   12:00 PM      1          ANDERSON, ANDY     23936     CONF - CONFIRMED     GHI - Group Health Inco
HAY - Dr. Timothy Hayburn, P.H.D.
      02-21-2023   10:00 AM     HAY         ANDERSON, ANDY     23936     UNCON - UNCONFIRMED  GHI - Group Health Inco
      04-12-2023   11:15 AM     HAY         ANDERSON, ANDY     23936     CONF - CONFIRMED     GHI - Group Health Inco
      04-18-2023   10:00 AM     HAY         ANDERSON, ANDY     23936     CONF - CONFIRMED     GHI - Group Health Inco


End of Report. Schedule/Reports/Missing Charge Report
Requested by MGR and completed at 1:41PM on Apr 21 2023
```

Notes on the criteria used when matching:

- The Appointment doctor OR its associated Insurance Dr code OR its associated Missing Charge Doctor (from the *Doctor Code Integration Table*) must match EITHER the charge Performing Dr or the charge Insurance Doctor.
- If you print the report for dates prior to the installation of v2023.2.0, you may receive more patients than anticipated due to the enhanced matching criteria.

Reports (cont.)

Interface Charge Reconciliation Report *(Reports > Transaction Journals > Interface Charge Reconciliation Report)*

The following changes were made to the report:

- Added a **Superbill** column.
- Changed the **Procedure Code** column heading to **CPT.**
- Added a **Pt** column heading for the patient's name column.

```
03-06-2023                                     Eastside Medical                                    Page 1
                                        Interface Reconciliation Report
                                     Interface ID 0001I - Database 7 - RC G3QA2
                                   Messages Received From 01-01-2020 Through 03-06-2023

Pt  Msg Date   MessageID          CPT    Service Date  Superbill  Interface Action         PM System Results
-------------------------------------------------------------------------------------------------------------
Banks, Robert  (8 Temporary New Pt)
    03-09-2020  20200309174024556  97150  03-09-2020                                        ** Charge not Found **
Boggs, Brock  (16 Temporary New Pt)
    08-03-2020  20200803043432898  97168  08-03-2020              Message Failed            ** Charge not Found **
    08-03-2020  20200803043432898                                 Message Failed            ** Charge not Found **
    08-03-2020  20200803043432898                                 Stored as Temp New Pt     Found as Temp New Pt
Brenon, Shaily  (202.7)
    06-16-2020  20200616170626900  97161  06-12-2020     5588     In Unposted Transactions  In Unposted Transactions
Calalhan, Keval  (122.7)
    02-05-2020  20200205161951775  97165  01-23-2020     5593     In Unposted Transactions  In Unposted Transactions
    02-05-2020  20200205161951775  97166  01-23-2020     5593     In Unposted Transactions  In Unposted Transactions
    02-05-2020  20200205161951775                                 Message Failed            ** Charge not Found **
    02-06-2020  20200206134236437  G9265  02-05-2020     5630     In Unposted Transactions  In Unposted Transactions
    02-06-2020  20200206161358731  92605  02-06-2020                                        ** Charge not Found **
    02-06-2020  20200206165626413  A9274  02-06-2020                                        ** Charge not Found **
    02-19-2020  20200219165849028  G9265  02-05-2020              In Unposted Transactions  In Unposted Transactions
    02-19-2020  20200219165850480  92605  02-06-2020                                        ** Charge not Found **
    02-19-2020  20200219165851574  A9274  02-06-2020                                        ** Charge not Found **
    08-03-2020  20200803070554973                                 Stored as Temp New Pt     Found as Temp New Pt
    08-03-2020  20200803073146183  T1003  08-03-2020              Message Failed            ** Charge not Found **
    08-03-2020  20200803073146183                                 Message Failed            ** Charge not Found **
    08-03-2020  20200803073146183                                 Stored as Temp New Pt     Found as Temp New Pt
    08-03-2020  20200803080046722  T1003  08-03-2020              Message Failed            ** Charge not Found **
    08-03-2020  20200803080046722                                 Message Failed            ** Charge not Found **
    08-03-2020  20200803080046722                                 Stored as Temp New Pt     Found as Temp New Pt
```

Interface Charge Reconciliation Report *(Reports > Transaction Journals > Interface Charge Reconciliation Report)*

Enhanced the report so that you can print it to *Microsoft Excel via MyReports*.
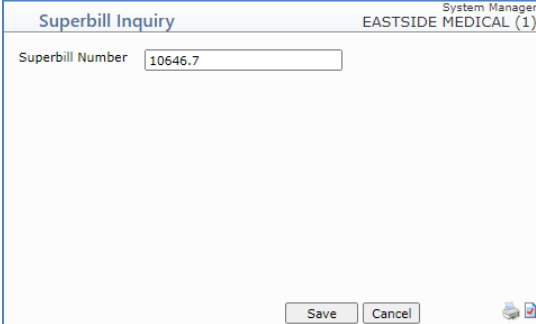
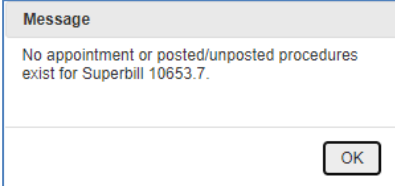| Acct	Patient	Msg Date	MessageID	CPT	Service Date	Superbill	Interface Action	PM System Results
4/12/2023								
EASTSIDE MEDICAL								
Interface Reconciliation Report								
Interface ID 0001I - Database 7 - RC G3QA2								
Messages Received From 01-01-2020 Through 04-12-2023								
16 Temporary New Pt	Boggs, Brock	8/3/2020	20200803043432898	97168	8/3/2020		Message Failed	** Charge not Found **
16 Temporary New Pt	Boggs, Brock	8/3/2020	20200803043432898				Message Failed	** Charge not Found **
16 Temporary New Pt	Boggs, Brock	8/3/2020	20200803043432898				Stored as Temp New Pt	** Charge not Found **
202.7	Brenon, Shaily	6/16/2020	20200616170626900	97161	6/12/2020		In Unposted Transactions	** Charge not Found **
122.7	Calalhan, Keval	2/5/2020	20200205161951775	97165	1/23/2020		In Unposted Transactions	** Charge not Found **
122.7	Calalhan, Keval	2/5/2020	20200205161951775	97166	1/23/2020		In Unposted Transactions	** Charge not Found **
122.7	Calalhan, Keval	2/5/2020	20200205161951775				Message Failed	** Charge not Found **
122.7	Calalhan, Keval	2/6/2020	20200206134236437	G9265	2/5/2020		In Unposted Transactions	** Charge not Found **

Schedule

Superbill Inquiry *(Schedule > Superbill Inquiry)*

The function has been enhanced to provide detailed information, so you can easily determine the status of a superbill and the action(s) that you might need to take. You can look up a superbill to see if it has already been posted, if it is waiting to be posted, if some charges have been posted for it but others are waiting to be posted, or if there are duplicate charges for the superbill.
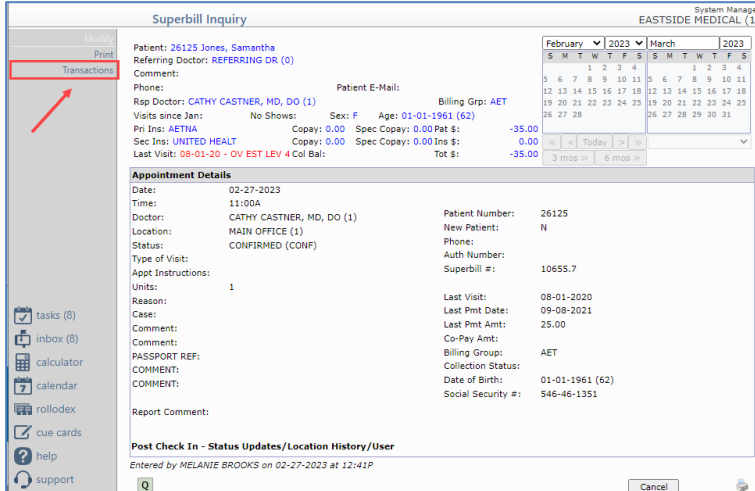
When you first access the function, you will need to type the superbill number you want to look up then click **Save**.

If no information exists in the system for the superbill number, you will receive a message stating:

If an appointment is tied to the superbill, the appointment details screen will display. If there are transactions in the system for the superbill, the **Transactions** Action Column will be active.

Schedule (cont.)

When you click **Transactions**, the *Superbill Inquiry Summary* screen will display detailed information for the superbill, in the following columns:

- **Status** – Will display **Posted** if the superbill has been posted or **Unposted** if the superbill is stored in the *Unposted Procedures* function.
- **Account #** - The patient's account number.
- **Patient** – The patient's first and last name.
- **DOS** – The date of service of the procedures entered on the superbill.
- **CPT** – The CPT (procedure) codes entered for the superbill.
- **Amount** – The procedure code amount.
- **Per Dr** – The performing doctor code entered for the superbill.
- **Ins Dr** – The insurance doctor code entered for the superbill.
- **Ref Dr** – The referring doctor code entered for the superbill.
- **Loc** – The location code entered for the superbill.

If an appointment is not tied to the superbill, the *Superbill Inquiry Summary* screen will immediately display.

Schedule (cont.)

You can quickly access a patient's transaction history to review the posted charges for a superbill by clicking anywhere in the row for the posted superbill. The *Encounter View* screen will be pre-filtered to display the encounter for the superbill you selected.
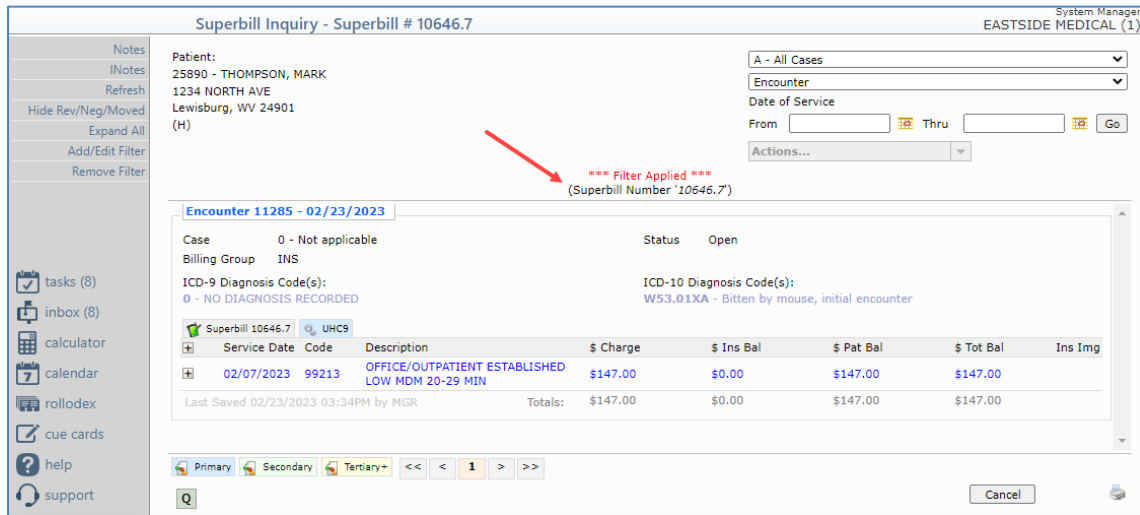
You can also access the *Unposted Procedures* function to post a superbill by clicking anywhere in the row for the unposted superbill. If you use Batches, the Batch screen will display.
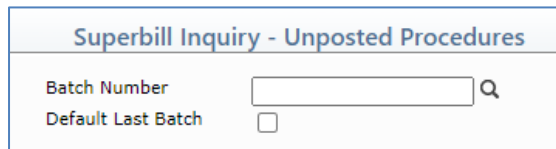
Otherwise, the *Unposted Procedures Summary* screen will display and will be pre-filtered to display only the charges for the superbill you selected.
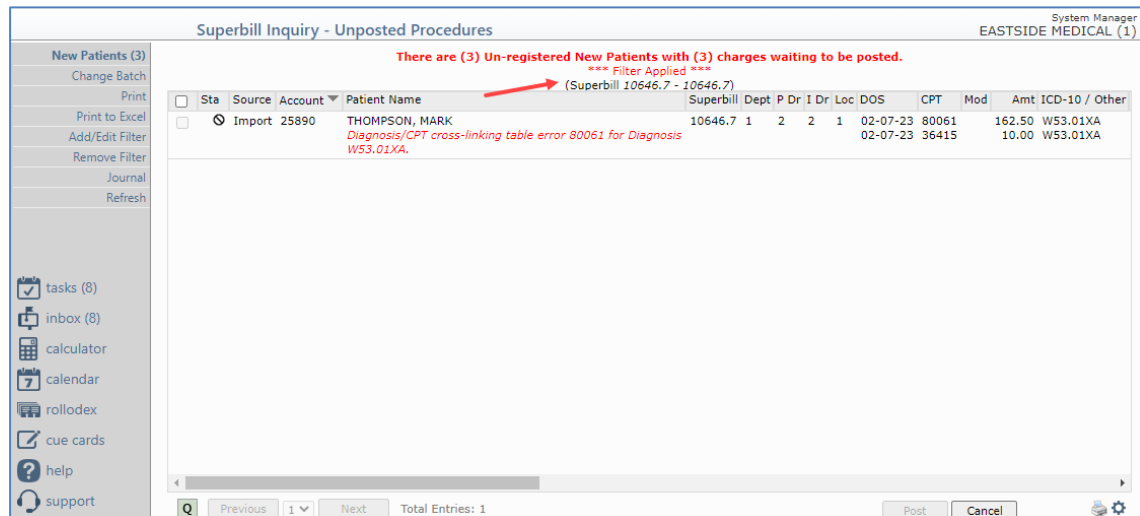
Schedule (cont.)

If a Superbill number displays and contains posted and unposted charges that are different.

Steps for processing:

1. Click on the row for the unposted charge(s) to access the *Unposted Procedures* function.
    a. Click either the **Print** Action Column button or the printer icon in the bottom right corner of the screen. This will open a separate window containing all the details for the unposted charge(s).
    b. Minimize the Print window, so you can access it later.
2. Click **Cancel** on the *Unposted Procedures* screen to return to the *Superbill Inquiry Summary* screen.
3. Click on the row for the posted charge(s) to access Transaction History – Encounter View.
    a. Click the **Add Procedure** encounter action. Access the Print window that you minimized earlier and add the charge(s) to this encounter.
    b. Click **Cancel** when you have finished to return to the *Superbill Inquiry Summary* screen.
    c. Close the Print window.
4. Click on the row for the unposted charge(s) again to access the *Unposted Procedures* function.
    a. Click on the row for the charge(s) to access *Procedure Entry*.
    b. Click **Delete** to delete the unposted charge(s).

If a Superbill number displays and contains posted and unposted charges that are the same.

Steps for processing:

1. First you will need to determine if the charges are duplicates by clicking each row separately to review the detailed information. If they are duplicates, then you will want to delete the duplicate from *Unposted Procedures*.
2. Click on the row for the unposted charge(s) to access the *Unposted Procedures* function.
    a. Click on the row for the charge(s) to access *Procedure Entry*.
    b. Click **Delete** to delete the unposted charge(s).

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 March 1, 2023, have been loaded. This is an update to the SERVICE TYPE HEALTH BENEFIT PLAN codes, that are displayed in the results when **Eligibility** is verified for an insurance carrier. The code descriptions have been changed to the standard ANSI code list for the EB03 segment found in the 005010x279 Health Care Eligibility Benefit Inquiry and Response (270/271) implementation guide.

System

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

A **Procedure Description** column has been added to the options for the *Unposted Procedures* function.

For additional information, see the *Unposted Procedures* entry in the *Transactions* section.

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

When HCPCS codes are added or edited, the changes will now be tracked and visible when you view **Changes to Tables**.

You can click on any row listed to view the details of the change.

Note: These changes will not be effective until the v2023.2.0 update has been installed.

For additional information, see the *Maintain Procedure Codes* entry under the *Tables* section of these release notes.
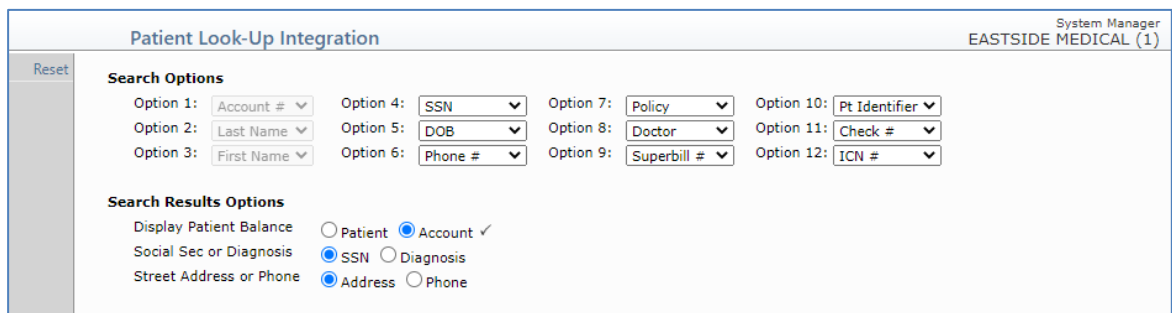
System (cont.)

Patient Look-Up Integration *(System > Database Maintenance Menu > Integrations > Patient Look-Up Integration)* ****New Functionality** **Action Required****

With this new function you can customize which search options are available on the Patient Look-Up screens throughout the system and determine the order they display in. The first three options: **Account #**, **Last Name** and **First Name** are fixed, but all the others are customizable.

The **Search Results Options** were moved from the Patient Look-Up section on the *CGM webPRACTICE Default Values* screen. For more information, see the *CGM webPRACTICE Default Values* entry under the System section of these release notes.
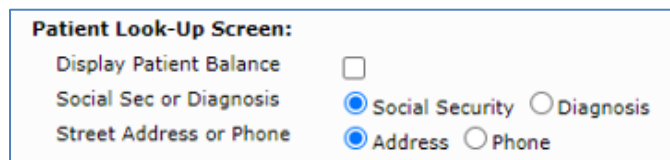
> **Notes**:
> - The *Patient Look-Up Integration* settings are stored by database.
> - Internally there are three different Patient Look-Up screens that the *Patient Look-Up Integration* applies to: Patient Look-Up in *Scheduling*, Patient Look-Up in *Reactivate/Inactive Patient*, and Patient Look-Up in other areas of the system. These changes do not apply to the Patient Look-Up screen in the *Patient Referral Menu*.
> - New search options will be added in the future, so this integration was created to make it easier to do so without having to keep adding more fields to the top of the Patient Look-Up screens. The search options will be limited to 12, but you will be able to pick which options you want.

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

The *Patient Look-Up Screen* section on the *CGM webPRACTICE Default Values* screen have been moved to the new *Patient Look-Up Integration* screen under the *Search Results Options* section.

Tables

Maintain Procedure Codes *(Tables > Procedure Code Table > Maintain Procedure Codes)*
 The **History** function has been modified so that when HCPCS codes are added or edited, the changes will now be tracked and visible when you view the **History** for codes.

Any changes will display when you click History.

You can click on any row listed to view the details of the change.

For additional information, see the *System Log* entry under the *System* section of these release notes.
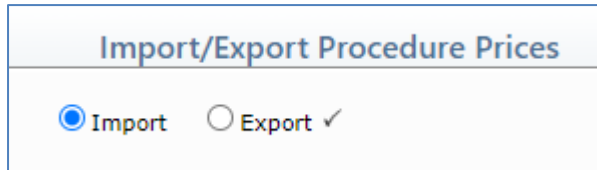
Tables (cont.)

Import/Export Procedure Prices *(Tables > Procedure Code Table > Procedure Prices > Import/Export Procedure Prices)*
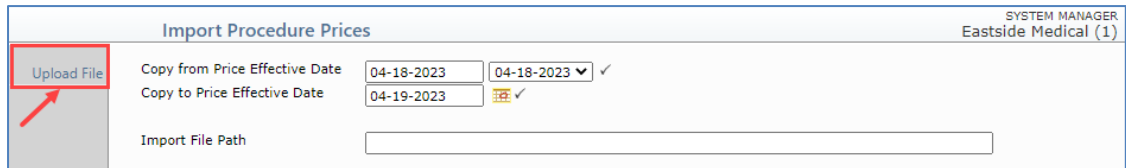
A new **Upload File** Action Column button has been added, so you can upload price list files from your workstation directly to the CGM webPRACTICE server without having to contact Customer Service for assistance.

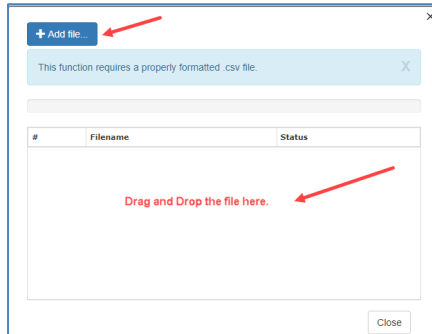When you first access the *Import/Export Procedure Prices* function:

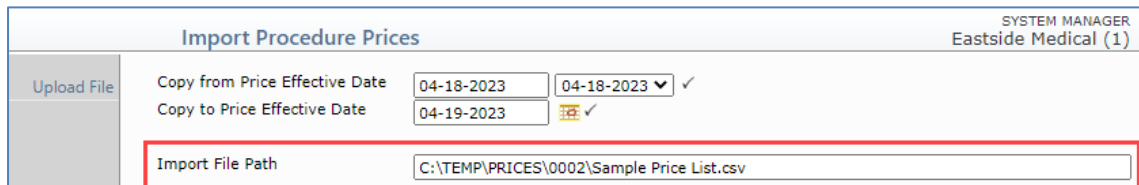- Select Import and click **Save**.

- 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 **Import File Path** field will automatically populate.

- At this point, click **Save** to import the price list as usual.

Tables (cont.)

Load the HCPCS Codes (*Tables > Procedure Code Table > Load the HCPCS Codes*) ****Action Required****
Updates to the 2023 HCPCS data files, effective April 1, 2023, are available for loading. 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 April 1, 2023. To receive the updated codes, you must load the **2023** file.

Load the AMA CPT® Codes *(Tables > Procedure Code Table > Load the AMA CPT® Codes)*
The 2023 **PLA** CPT codes effective April 1, 2023 are available. The PLA codes are Vaccine Specific CPT Codes for Coronavirus Immunizations and can be loaded by selecting the Pathology and Lab code category.

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 April 1, 2023, have been released.

Transactions

Procedure Entry Function and Edit an Encounter *(Transactions > Procedure Entry Function and Transactions > Edit an Encounter)*

The **Multiplier** field has been expanded so that up to four digits are now visible. Previously only two digits were visible.

Reverse a Transaction *(Transactions, Reverse a Transaction)*

Enhancements were made so you can now reverse a payment or adjustment even if it had been applied towards a transaction that was reversed - if the open amount remaining on the payment or adjustment is the same as the original amount posted. Previously, the system would prevent you from reversing these transactions.

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

Made the following improvements to the Totals section when you print an EOB:

- Removed the **PROV ADJ** total.
- Changed the **RC-AMT** total so it includes Adjustment & Denial amounts (except for Deductible and Coins/Copay since those are reported in separate columns).
- Moved the **CHECK TOTAL** to print before the BILLED amount.

Transactions (cont.)

Unposted Procedures *(Transactions > Unposted Procedures)*
Resolved an issue with encounters that were posted using the **Auto-Post** check boxes and the **Post** button. The audit trails (*Edit an Encounter > Audit Trail*) of the encounters were not reflecting any activity details prior to the encounters being posted.

> **Note**: This will only apply to the audit trails for encounters posted after the v2023.2.0 update has been installed.

Unposted Procedures *(Transactions > Unposted Procedures)*
Resolved an issue with duplicate encounters being posted when two users both accessed *Unposted Procedures* at the same time, and both users selected the same procedure(s) for an account at the same exact second and they both posted the procedures within a couple of seconds of each other.

Unposted Procedures *(Transactions > Unposted Procedures)*
A new **Procedure Description** column has been added. The **ICD-10/Other** and **ICD-9/Other** columns have been renamed to **ICD-10** and **ICD-9**. Prior to these changes if an alternate description was entered for a procedure code, the alternate description would display under the ICD columns instead of the ICD codes (this was the *Other*). With this change only ICD codes will display under the ICD columns and the procedure descriptions will display under the **Procedure Description** column. For additional information, see the *Column Selectable Fields* entry in the *System* section.

> **Note**: The *Transactions > Pre-Treatment* function shares the same screen as *Unposted Procedures*, so all the above applies to Pre-Treatment also.

Charge Import Utility *(Transactions > Charge Import Utility)*
Enhanced the utility so that it now supports importing Modifiers 3 and 4. In the *File Specifications*, **Modifier 1** has been changed to **Modifiers 1 & 2** and **Modifier 2** has been changed to **Modifiers 3 & 4**.

Field	Description	Required	Notes
H	Modifiers 1 & 2		#### (two to four numeric characters only)
I	Modifiers 3 & 4		#### (two to four numeric characters only)