



**CompuGroup™**  
Medical

**What's New in**

**CGM webPRACTICE™ v2023.3.0**

**Preliminary Release Notes**

**August 23, 2023**

**CGMwebPRACTICE™**

Fully Web-Based Practice Management Suite



## Table of Contents

- Introduction ..... 3
- New Features and Enhancements ..... 4
  - Summary of Action Required Items..... 4
  - Summary of Changes to Document..... 4
- General Enhancements ..... 5
- Collections ..... 7
  - Patient ..... 7
  - System ..... 8
- Tables..... 9
- Transactions..... 10
- CGM webTOOLS ..... 11

## INTRODUCTION

This document provides an overview of new features, resolutions, and enhancements available in the release of CGM webPRACTICE v2023.3.0. 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 v2023.3.0 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
9	<b>Import Fee Schedules</b>	Load the updated files if applicable
9	Load the HCPCS Codes	Load the updated files if applicable
9	Load the AMA CPT <sup>®</sup> Codes	Load the files if applicable

### Summary of Changes to Document

Preliminary Release Notes to be released August 1, 2023

Section	Function	Added/Deleted/Revised

## General Enhancements

### Patient Control Number (Pat Ctrl #)

Multiple enhancements have been made to the following functions, so **Patient Control Numbers** can be used, which provides more accurate processing of claims and ERAs. This includes when searching for patient accounts, sending claims, processing ERAs, and reviewing patient encounters.

- Patient Look-Up Integration** (*System > Database Maintenance Menu > Integrations > Patient Look-Up Integration*) - A new **Pat Ctrl #** (*Patient Control Number*) option has been added, so you can search for patients in the *Patient Look-Up* screen using the unique claim identifier number if needed.

**Patient Look-Up Integration**

**Search Options**

Option 1: Account #	Option 4: <b>Pat Ctrl #</b>	Option 7: Policy	Option 10: Pt Identifier
Option 2: Last Name	Option 5: DOB	Option 8: Doctor	Option 11: Check #
Option 3: First Name	Option 6: Phone #	Option 9: Superbill #	Option 12: ICN #

- History – Encounter View** (*Patient > Change Patient Data > History - Encounter View*) - The **Pat Ctrl #** will display:
  - When you hover over the claim tab. It will display only when the claim status is *sent* or *denied*. The **Pat Ctrl #** will display with a C in front of the number.

Case	0 - Not applicable	Status	Open
ICD-9 Diagnosis Code(s):	0 - NO DIAGNOSIS RECORDED		
ICD-10 Diagnosis Code(s):	D50.0 - Iron deficiency anemia secondary to blood loss (ch		
PERSO, Sent 06/13/2023			
Service	Primary Claim File to PERSONAL CARE PLUS/UHC PLAN, Status: Sent on 06/13/2023, Pat Ctrl # C2004093	\$ Pat Bal	\$ Tot Bal
04/20/2023 99214	OFFICE/OUTPATIENT ESTABLISHED MOD MDM 30-39 MIN	\$298.00	\$0.00

- On the auto-generated EOB between **ACCT #** and **ICN #**.

ARIZONA PHYSICIANS IPA INC  
UNITEDHEALTHCARE DUAL COMPLETE HMO SNP  
PHOENIX, AZ 850110000  
Auto-Generated EOB - Electronically Posted  
ARIZONA CENTER FOR HEMATOLOGY

Provider #: 1841243722  
Date: 06/27/23  
Check/EFT #: 2023193510900874

PERF	PROV	SERV DATE	POS	NOS	PROC	MODS	BILLED	ALLOWED	DEDUCT	COIN/COPAY	GRP/RC	AMT	PROV PD
NAME:	ADAMS, SHARON	MID:	A44450740	ACCT #:	26183	PAT CTRL #:	C2003780	ICN #:	226107127022				
1770580037	0401	040123	M1	1	99213	---	147.00	126.26	0.00	29.25	CO 45	20.74	97.01
1770580037	0401	040123	M1	1	31955	---	62.00	11.84	0.00	3.16	CO 45	50.16	8.68
PT RESP	32.41			CLAIM TOTALS	209.00		138.10		0.00	32.41		70.90	105.69 NET

CLAIM STATUS: Processed as Primary  
CLAIM REMARK CODES:

## General Enhancements (cont.)

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

Modified the report to list both the patient account # and the **Pat Ctrl #**.

Patient Name		ERA	Beginning	Ending	Procedure	Billed	Allowed	Adj	Exception
Acct #	Pat Ctrl #	Line	Serv Date	Serv Date	Code	Amount	Amount	Code	Code
26637	DREYER, DANIEL ~ C2003496	1	10-26-22	10-26-22	G6015	711.00	356.59	CO 253	5
5 Amount paid is more than owing									

- **Patient Look-Up screens** – If you selected to have the **Pat Ctrl #** as a look-up option in the *Patient Look-up Integration* function, you can either enter the number with a 'C' in front, or without a 'C' – both methods are acceptable.
- **5010 Electronic Claim Loop and Segment Editor** (*System > Claims Management Menu > 5010 Electronic Claim Loop and Segment Editor*) - Both Professional and Institutional claims have been updated to send the **Pat Ctrl #** in Loop 2300, CLM01 of the claim file instead of the patient account number, so that information returned from the payer can be easily linked to the claim. All existing Profiles will be automatically updated (*unless a customization exists in the profile*) when the v2023.3.0 update is installed.

## Collections

### Turn Over History Report (*Collections > Patient Collections > Turn Over Functions > Turn Over History Report*)

Enhanced the report to include a **Collection DB Balance** column, which displays the current collection balance at the time the report is printed. This column has been added to the standard printed report and the Excel version.

6/27/2023					
EASTSIDE MEDICAL (1)					
Turn Over History Report					
From 06-08-2023 Through 06-08-2023					
Agency	Patient Number	Patient Name	Date Turned Over	Amount Turned Over	Collection DB Balance
1 - COLLECTION EXPRESS	130		6/8/2023	661.77	661.77
1 - COLLECTION EXPRESS	26058.1		6/8/2023	65	55
End of Report. Collections/Patient Collections/Turn Over/History Report					
Requested by MGR and completed at 11:19AM on Jun 27 2023					

## Patient

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

Enhancements made to resolve issues with *Transaction History – Encounter View* not displaying accurately when negative payments and/or adjustments were posted through the *Payment Entry* function. In certain situations, the line-item balance(s) would not transfer back to the insurance balance column and the insurance flag wouldn't be reset to the last insurance billing status prior to the posting of the negative payment and or adjustment. In addition, the word 'Negate' has been added in front of the negative insurance adjustment or insurance payment in Encounter view.

**Transaction History**

Patient:  
26138 - Mozart, Wolfgang \*\*  
3300 N Central Ave  
Phoenix, AZ 85012  
(H)  
\*\*ACCOUNT TURNED TO COLLECTIONS\*\*

Encounter 11594 - 07/25/2023

Case 0 - Not applicable  
Billing Group COL

ICD-9 Diagnosis Code(s):  
0 - NO DIAGNOSIS RECORDED

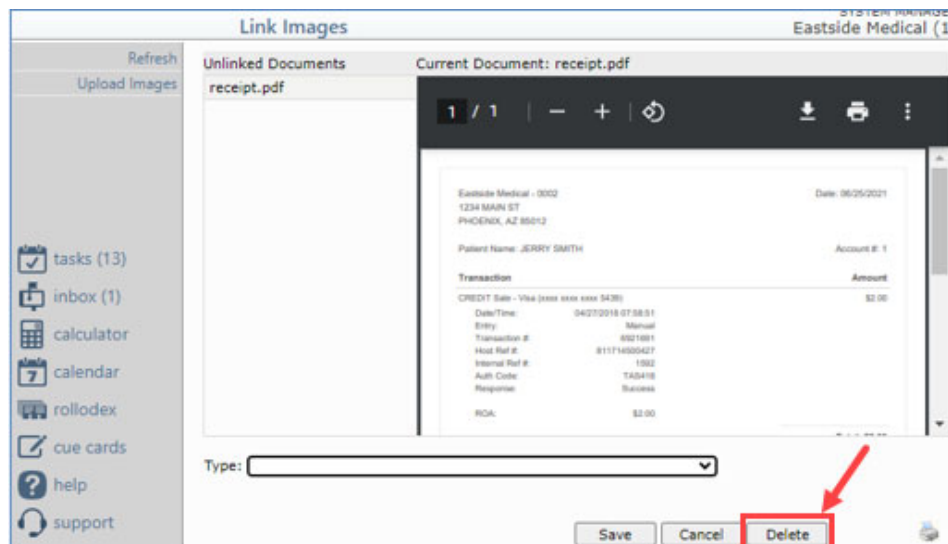
AET, Sent 07/25/2023

Service Date	Code	Description	
07/25/2023	99214	OFFICE/OUTPATIENT ESTABLISHED MOD MDM 30-39 MIN	
ICD-9 Diagnosis Code(s): 0 - NO DIAGNOSIS RECORDED			
ICD-10 Diagnosis B30.3 - Acute epidemic hemorrhagic conjunctivitis (enterov Code(s):			
07-25-2023	AETNA PMT		45.00
07-25-2023	W/O AETNA		7.50
07-25-2023	Negate - AETNA PMT		-45.00
07-25-2023	Negate - W/O AETNA		-7.50

## System

### Link Images (System > Image Management > Link Images)

Resolved issues with uploading files that contained non-standard characters in the filename, which prevented you from linking or viewing them. For example, the file name **Product™.pdf** contains a trademark symbol, which would cause an issue. Now, any non-standard characters will be stripped out of the filename after they are uploaded. In the example above, the filename will strip off the trademark symbol and display **Product.pdf** under *Unlinked Documents* after the file is uploaded. In addition, a **Delete** button has been added, so you have the capability to delete unlinked documents. You must first select a document in the *Unlinked Documents* list and then the **Delete** button will become active.





## Tables

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### **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 Clinical Laboratory Fee Schedule, effective April 1, 2023 and July 1, 2023.
- 2023 Medicare DME Fee Schedules; Prosthetics/Orthotics and Supplies (DMEPOS), effective April 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.

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

Updates to the 2023 HCPCS data files, effective July 1, 2023, are available. To receive the updated codes, you must load the 2023 file.

### **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 July 1, 2023, have been released.

### **Load the AMA CPT® Codes** (*Tables > Procedure Code Table > Load the AMA CPT® Codes*) **\*\*\*Action Required\*\*\***

The 2023 **PLA** CPT codes effective July 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.

## Transactions

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

Added a new data element for **Proc-Encounter #**, which will print the encounter number for the procedure.

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

Modified the **View Archive** Action Column function so a Filter will be automatically applied so that only archived files with file dates within the last 60 days will be displayed. This change was made to prevent system slowness when there are many archived files spanning several years. You can edit the Filter to display archived files older than 60 days as needed.

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

The following changes were made when ERA files are posted:

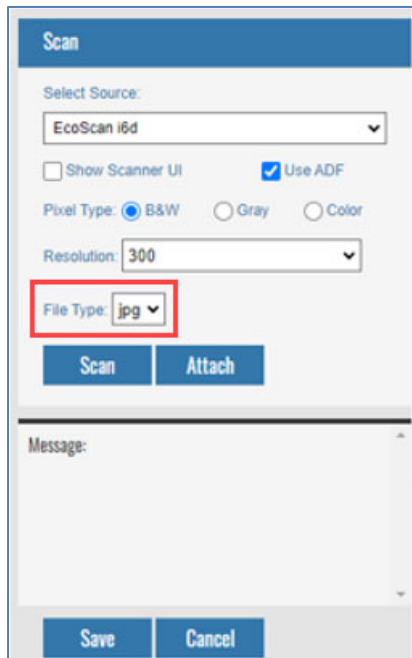
- Resolved an issue where the payment could potentially post to the wrong line item for ERA  
Exception codes:
  - 4 - Insurance balance is zero
  - 5 - Amount paid is more than owing
  - 22 - Pmt is > than claim pmt-post manually
- Expanded the matching process for ERA Exception codes:
  - 1- Procedure not in open index-not posted
  - 2 - Procedure code does not match remit
- Changed the text for ERA Exception code 2 to:
  - Unable to match Procedure/Procedure details. An exact match could not be found for the procedure code listed on the remit and the patient's account (including checking the Date of Service, Equivalent CPTs, Amounts and Modifiers). This payment will need to be manually allocated and posted.

## CGM webTOOLS

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### CGM Direct Scanning – PDF Functionality

Enhancements have been made so multi-page documents can now be scanned and saved in every function in the system that CGM Direct Scanning is available. A **File Type** option has been added with options for jpg or PDF and the default is jpg.



The screenshot shows a 'Scan' dialog box with the following fields and controls:

- Select Source:** A dropdown menu with 'EcoScan i6d' selected.
- Show Scanner UI:** An unchecked checkbox.
- Use ADF:** A checked checkbox.
- Pixel Type:** Radio buttons for 'B&W' (selected), 'Gray', and 'Color'.
- Resolution:** A dropdown menu with '300' selected.
- File Type:** A dropdown menu with 'jpg' selected, highlighted by a red rectangular box.
- Buttons:** 'Scan' and 'Attach' buttons are located below the File Type dropdown.
- Message:** A text area for messages.
- Bottom Buttons:** 'Save' and 'Cancel' buttons.

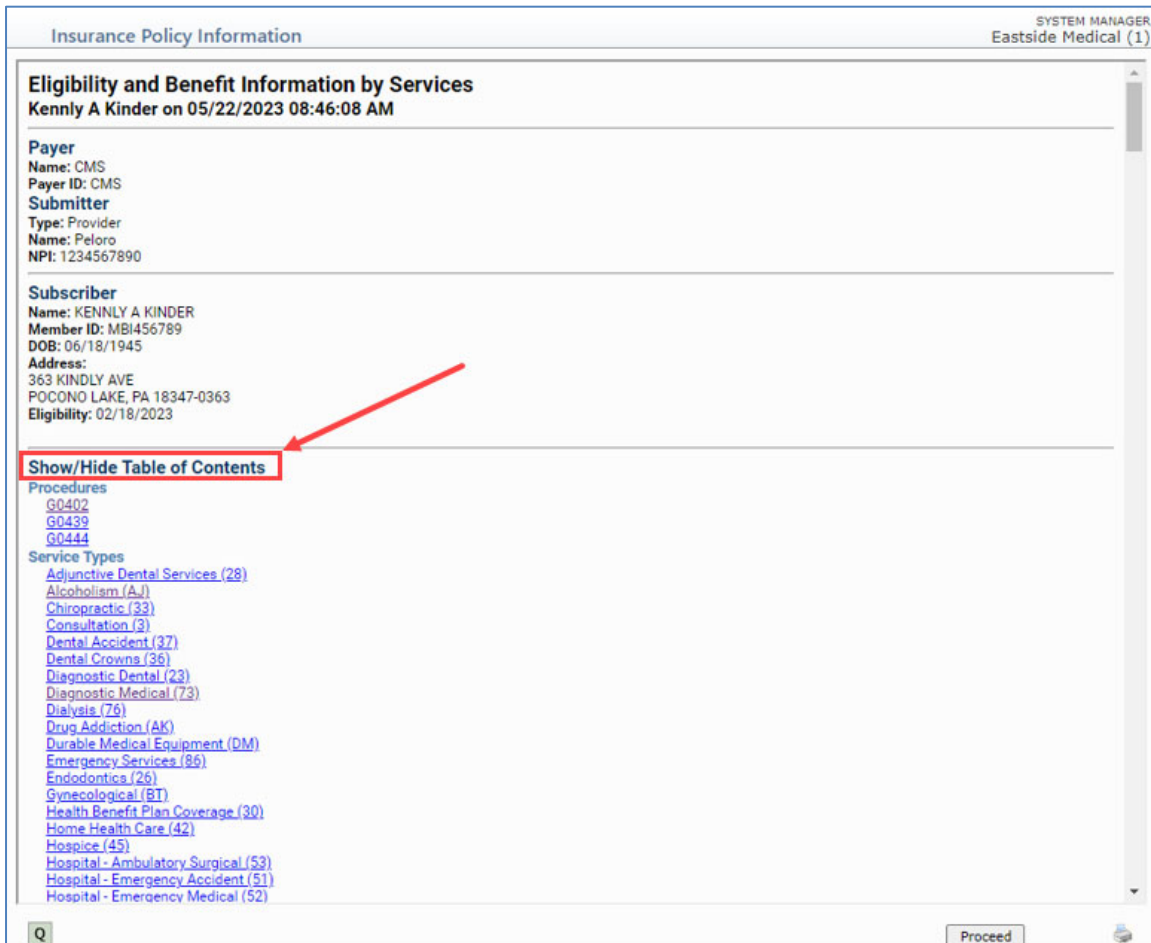
To save you time, all multi-page documents will automatically be saved as PDFs regardless of what **File Type** option has been selected, so it will not be necessary for you to manually change the **File Type**. Enhanced functionality for editing and saving multiple page documents is also available. In addition, PDF documents can now be attached using the **Attach** button when using Direct Scanning. For detailed information, see the *Scan and Attach Instructions* in CGM webPRACTICE Help (CGM webTOOLS > CGM Direct Scanning).

## CGM webTOOLS (cont.)

**Verify Eligibility** ((Patient > Change Patient Data – Insurance > Verify Eligibility) and (Schedule > Verify Eligibility)) \*\*\* CGM webVERIFY Clients Only\*\*\*

The results screen has been enhanced and the Expandable and Classic views have been removed. The enhanced view will only display for results acquired after the v2023.3.0 update has been installed. All results acquired prior to the update will still display in the Expandable and Classic views. The enhanced results display in a web format now and provide a **Show/Hide Table of Contents** function. You can click **Show/Hide Table of Contents** and then click on a link to jump to that section in the results.

Example with the Table of Contents showing:



Insurance Policy Information SYSTEM MANAGER  
Eastside Medical (1)

**Eligibility and Benefit Information by Services**  
Kennly A Kinder on 05/22/2023 08:46:08 AM

**Payer**  
Name: CMS  
Payer ID: CMS


**Submitter**  
Type: Provider  
Name: Peloro  
NPI: 1234567890

**Subscriber**  
Name: KENNELLY A KINDER  
Member ID: MBI456789  
DOB: 06/18/1945  
Address:  
363 KINDLY AVE  
POCONO LAKE, PA 18347-0363  
Eligibility: 02/18/2023

**Show/Hide Table of Contents**

Procedures  
[G0402](#)  
[G0439](#)  
[G0444](#)

Service Types  
[Adjunctive Dental Services \(28\)](#)  
[Alcoholism \(A\)](#)  
[Chiropractic \(33\)](#)  
[Consultation \(3\)](#)  
[Dental Accident \(37\)](#)  
[Dental Crowns \(36\)](#)  
[Diagnostic Dental \(23\)](#)  
[Diagnostic Medical \(73\)](#)  
[Dialysis \(76\)](#)  
[Drug Addiction \(AK\)](#)  
[Durable Medical Equipment \(DM\)](#)  
[Emergency Services \(86\)](#)  
[Endodontics \(26\)](#)  
[Gynecological \(BT\)](#)  
[Health Benefit Plan Coverage \(30\)](#)  
[Home Health Care \(42\)](#)  
[Hospice \(45\)](#)  
[Hospital - Ambulatory Surgical \(53\)](#)  
[Hospital - Emergency Accident \(51\)](#)  
[Hospital - Emergency Medical \(52\)](#)

Q Proceed 

## CGM webTOOLS (cont.)

Example with the Table of Contents hidden:

Insurance Policy Information
SYSTEM MANAGER  
Eastside Medical (1)

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### Eligibility and Benefit Information by Services

Kenny A Kinder on 05/22/2023 08:46:08 AM

---

**Payer**  
 Name: CMS  
 Payer ID: CMS

**Submitter**  
 Type: Provider  
 Name: Peloro  
 NPI: 1234567890

---

**Subscriber**  
 Name: KENNY A KINDER  
 Member ID: MBI456789  
 DOB: 06/18/1945  
 Address:  
 363 KINDLY AVE  
 POCONO LAKE, PA 18347-0363  
 Eligibility: 02/18/2023

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[Show/Hide Table of Contents](#)

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#### Eligibility Details

**Health Benefit Plan Coverage (30)**

**Medicare Part A**  
**Active Coverage** (Plan: 05/01/2009)  
 - 0-beneficiary insured due to age oasi

**Medicare Part A**

Benefit	Amount	Time Period	Messages
Deductible	\$1,600.00	Episode	1
Deductible	\$1,600.00	Remaining	1

1 - Plan: 01/01/2023-12/31/2023

**Medicare Part B**  
**Active Coverage** (Plan: 05/01/2009)  
 - 0-beneficiary insured due to age oasi

**Medicare Part B**

Benefit	Amount	Time Period	Messages
Deductible	\$226.00	Calendar Year	1