



CompuGroup™
Medical

What's New in

CGM webPRACTICE™ v2024.2.0

Final Release Notes

August 08, 2024

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 v2024.2.0. 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 v2024.2.0 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
9	Import Fee Schedules	Load the updated files if applicable
9	Load the HCPCS Codes	Load the updated file if applicable
9	Load AMA CPT® Codes	Load the updated file if applicable
9	Import RVU Unit Values	Load the updated file if applicable

Summary of Changes to Document

Preliminary Release Notes were released July 30, 2024

Section	Function	Added/Deleted/Revised
CGM webPAY	Credit Card Fee Integration Setup	Revised
CGM webPAY	Patient Check In/Out	Revised

Collections

Payment Plans *(Patient Collections > Work Accounts)* *(Patient Collections > Non-Delinquent Payment Plans)* and *(Patient Collections > Manage Payment Plans)*

Enhancements have been made to track each time a User adds, changes, or deletes a payment plan. When you access an existing payment plan for a patient, a **History** Action Column button will be available so you can view all the activity for that payment plan. If there isn't any activity to display, the **History** button will be inactive.

Work Accounts - Payment Plan History											System Manager EASTSIDE MEDICAL (1)		
Date	Time ▲	Status	Plan Start Date	Pmt Amt	Pmt Days	Next Pmt Date	Status for Default	CGM webPAY	CC#	Pmt Method	Card Holder	Zip	Action/User
04-09-2024	10:22A	Active	04-09-2024	100.00	30	05-09-2024	6-PAYMENT PLAN FAILED	No					Added By MGR

Note: The date and time for any activity will only be available for actions taken after the 2024.2.0 update has been installed.



Reports

Denial and Adjustment Report to Excel (Reports > Insurance Related Reports > Denial Reports > Denial and Adjustment Report to Excel) ***New Functionality***

With this new function, you can print a report to Excel containing all denials and adjustments posted within a selected date range. You can filter this report by **Practice Denial Reason** codes, **Adjustment** codes and by **ANSI CARC** codes if you want or leave the fields blank to include all codes.

Denial and Adjustment Report to Excel

From Practice Denial Reason
 Through Practice Denial Reason
 From Adjustment Code
 Through Adjustment Code
 From ANSI CARC Code
 Through ANSI CARC Code
 Print from Denial/Adj Posted Date

Sample Report

1	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ			
1	5. App. 24																																					
2	EASTRIDGE MEDICAL																																					
3	Denial and Adjustment Report to Excel																																					
4	From 01/01/2024 Through 03/22/2024																																					
	Acct #	Guar Name	Accounting Date	Service Date	Patient	Per Dr	Ins Dr	Ref Source	Loc	Billing Grp	Proc Code	Chg Amt	Ins Amt	Ph Prnt	Total Adj	Ref	Date	Remaining Denial Pmt	Denial Code	Denial Carrier	Denial Action	Denial Description	Prac Denial Code	Prac Denial Description	Denial ANSI CARC Code	Denial ANSI CARC Description	Adj Date Pmt	Adj Acct Date	Adj Amt	Adj Carrier	Adj Action	Adj Code	Adj Description	Adj ANSI CARC Code	Adj ANSI CARC Description	Last Activity Date	Last Activity Center	Last Activity Description
6	26329	Violet Allbeck	3/19/2024	3/19/2024	Allbeck, Violet	1	1	0	1	AET	8001	395.55	40	0	90.47	255.08	3/19/2024	96.1	BC	Applied to insurance deductible	1	Applied to insurance deductible	D	Applied to insurance deductible	45	Contracted fee, Chg received	3/19/2024	3/19/2024	30.47	BC	Adjustment Primary	BC	BCBS ADJ	45	Contracted fee, Chg received	3/19/2024	BC	Claims Registered
7	26329	Violet Allbeck	3/19/2024	3/19/2024	Allbeck, Violet	1	1	0	1	AET	9624	325	30	0	238.59	95.41	3/19/2024	74.32	BC	Applied to insurance deductible	1	Applied to insurance deductible	D	Applied to insurance deductible	45	Contracted fee, Chg received	3/19/2024	3/19/2024	238.59	BC	Adjustment Primary	BC	BCBS ADJ	45	Contracted fee, Chg received	3/19/2024	BC	Claims Registered
8	26529	Sophie Lyall	6/10/2023	6/10/2023	Lyall, Sophie	1	1	ALT	1	CDL	9624	325	125	0	69	131	2/26/2024	131	AET	Patient coinsurance	1	Patient coinsurance	C	Patient coinsurance	45	Contracted fee, Chg received	2/26/2024	2/26/2024	69	AET	Adjustment Primary	AETNA	AETNA ADJ	45	Contracted fee, Chg received	2/26/2024	AET	Denied Primary
9	26597	Noah Johnson	2/02/2024	2/02/2024	Johnson, Noah	1	1	ALT	1	AET	9624	325	50	0	10	285	2/02/2024	15	AET	Applied to insurance deductible	1	Applied to insurance deductible	D	Applied to insurance deductible	45	Contracted fee, Chg received	2/02/2024	2/02/2024	10	AET	Adjustment Primary	AETNA	AETNA ADJ	45	Contracted fee, Chg received	2/02/2024	AET	Denied Primary
10	26597	Noah Johnson	2/02/2024	2/02/2024	Johnson, Noah	1	1	ALT	1	AET	3645	10	126	0	6	2.74	2/02/2024	2.74	AET	MISSING SUPPORTING DOCUMENTATION	226	SUPPORTING DOCUMENTATION NEEDED	S	SUPPORTING DOCUMENTATION NEEDED	226	Supporting info requested from the Billing/Ref Prod team	2/02/2024	2/02/2024	6	AET	Adjustment Primary	AETNA	AETNA ADJ	45	Contracted fee, Chg received	2/02/2024	AET	Denied Primary

This report provides the following information:

- Acct #** - Patient account number.
- Guar Name** – Guarantor’s name (First name, Last name).
- Accounting Date** – Accounting Date of the transaction.
- Service Date** –Service Date of the transaction.
- Patient** – Patient’s name (Last, First).
- Per Dr** – Performing Doctor code stored on the transaction.
- Ins Dr** – Insurance Doctor code stored on the transaction.
- Ref Source** – Referral Source code stored on the transaction.
- Loc** – Location code stored on the transaction.
- Billing Grp** – Billing Group code stored on the transaction.
- Proc Code** – Procedure code for the transaction.

Reports (cont.)

Chg Amt – Charge amount of the transaction.

Ins Pmt – Insurance payment amount posted on the transaction.

Pt Pmt – Patient payment amount posted on the transaction.

Total Adjs – Total of all adjustments posted on the transaction whether they are included in the report or not. Some adjustments may not print if they fall outside the selected **Posted Date** range.

- If an adjustment is included in the report but was ‘negated’ on a date outside the selected **Posted Date** range, the negated amount *will* be included in the **Total Adjs** amount.

Remaining Bal – Remaining balance owing for the transaction.

Date Denial Posted – Actual date the denial was posted to the transaction.

Denial Amt – Denial amount posted for individual denial code.

Denial Carrier – Insurance Carrier code for the denial.

Denial Action – Action description stored in the insurance ledger if insurance related.

Prac Denial Code – Practice Denial code posted for the transaction.

Prac Denial Description – Practice Denial code description posted for the transaction.

Denial ANSI CARC Code - ANSI CARC code posted for the denial.

Denial ANSI CARC Reason – ANSI CARC code description posted for the denial.

Adj Date Posted – Actual date the adjustment was posted to the transaction.

Adj Acct Date – Accounting date the adjustment was posted to the transaction.

Adj Amount – Individual adjustment amount for the transaction.

Adj Carrier – Insurance carrier code for the adjustment.

Adj Action – Action description stored in the insurance ledger if insurance related.

Adj Code – Adjustment code for the adjustment.

Adj Description – Adjustment code description for the adjustment.

Adj ANSI CARC Code – ANSI CARC code posted for the adjustment.

Adj ANSI CARC Description – ANSI CARC code description posted for the adjustment.

Last Activity Date – Date of the last insurance activity on the patient account.

Last Activity Carrier – Insurance Carrier code for the last insurance activity.

Last Activity Description - Last insurance activity description.

Reports (cont.)

Notes:

- All denials/adjustments will be included in the report for the selected **Posted Date** range, whether they were allocated to a transaction or not, and whether they were insurance adjustments or not. This includes collection adjustments, patient adjustments, small balance write-off adjustments, etc. The exception is if a denial/adjustment was **reversed** within the selected **Posted Date** range, then that denial/adjustment will not be included in the report.
- If an adjustment was allocated to a transaction and there wasn't a CARC code associated with it, and a Payment was also posted (whether \$0 or an amount), the CARC code 45 will print.
- This report should **NOT** be used to balance to other reports because it is generated for a 'Posted Date' range and not an accounting date range.
- Since each transaction could have multiple rows to reflect every adjustment and denial allocated to the transaction, the Chg Amt, Ins Pmt, Pt Pmt, Total Adjs, and Remaining Bal columns will only print amounts on the first row for the transaction, so that if you total these columns the report totals will not be overinflated.

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

The following data elements have been added:

- T9.5b – Proc-Performing Dr NPI
- T9.11b – Proc-Place of Service Code xxxxx
- T9.11c – Proc-Place of Service Code xxxxx
- T9.11d – Proc-Place of Service Code xxxxx
- T9.11e – Proc-Place of Service Code xxxxx
- T9.11f – Proc-Place of Service Code xxxxx

The 'xxxxx' represents the various **Equivalent Insurance Names** entered into *the CGM webPRACTICE Integration Options* function.

System

Interfaces Menu (*System > Interfaces*)

The *Interfaces* menu functions have been suppressed from displaying since they are for *Internal Use only*.

Tables

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

Updates to the 2024 HCPCS data files, effective April 1, 2024 are available. To receive the updated codes, you must load the 2024 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 2024 Medicare Relative Value Unit files (RVUs) effective April 1, 2024. To receive the updated codes, you must load the **2024** file.

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

The 2024 **PLA** CPT codes effective April 1, 2024 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.

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:

- 2024 Medicare Clinical Laboratory Fee Schedule, effective April 1, 2024.
- 2024 Medicare DME Fee Schedules; Prosthetics/Orthotics and Supplies (DMEPOS), effective April 1, 2024

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 – Audit Log (Transactions > Unposted Procedures)

An **Audit Log** Action Column button has been added so you can view a record of actions that have taken place.

Unposted Procedures						
There are (1) Un-registered New Patients with (1) charges waiting to be posted.						
New Patients (1) Change Batch Print Print to Excel Add/Edit Filter Remove Filter Journal Refresh Audit Log	<input type="checkbox"/>	Sta	Source	Account	Patient Name	Procedure Description
	<input type="checkbox"/>	E-Superbill		25265	KELLER, CHRIS <i>CGM webCODER Validation Failed. One or more Authorization attachments may be required. Diagnosis/CPT cross-linking table error 99213 for Diagnosis W53.01XA.</i>	OFFICE/OUTPATIENT ESTABLISHED LOW MDM 20 MIN
	<input type="checkbox"/>	E-Superbill		25296	SMITHSON, AMANDA <i>CGM webCODER Validation Failed.</i>	OFFICE/OUTPATIENT ESTABLISHED MOD MDM 30 MIN
	<input type="checkbox"/>	E-Superbill		25380	SMITH, CARRIE	OFFICE/OUTPATIENT ESTABLISHED MOD MDM 30 MIN
	<input type="checkbox"/>	Procedure Entry		25399	SIMPSON, SAMANTHA <i>CGM webCODER Validation Failed.</i>	OFFICE/OUTPATIENT ESTABLISHED MOD MDM 30 MIN

When you access the function, a Filter is automatically applied to display the activity for the last 90 days, but you can edit the Filter as needed. **Note:** The fields in the filter do not use the standard table look-ups because codes that come over in an interface may not exist in the Tables yet – therefore all the table look-up fields are free text with the exception of the **User Code**. The **User Code** list will only include the users recorded in the audit log journal.

Unposted Procedures - Audit Log Filter

Performing Doctor	<input type="text"/>
Location	<input type="text"/>
Department	<input type="text"/>
For Account #	<input type="text"/>
From Date of Service	<input type="text"/> Through <input type="text"/>
From Superbill Number	<input type="text"/> Through <input type="text"/>
For User Code	<input type="text"/> <input type="text"/>
Date Entered	04-30-2024 Through <input type="text"/>
Action	<input type="text"/>

The **Action** represents how the entry got into the audit log. The three types of Actions that are logged are Save, Delete and Dup.

- Save - When you 'save' an unposted procedure (post it).
- Delete - If you delete entries from Unposted Procedures.
- DUP - Where a ticket is deleted because a duplicate ticket number was found.

Unposted Procedures - Audit Log														System Manager EASTSIDE MEDICAL (1)		
*** Filter Applied *** (Date Entered >= 04-30-2024)																
Date	Time	User	Action	Acct	Patient	DOS	CPT	Loc	Diagnosis	Per Dr	Ins Dr	Ref Dr	Superbill	Dept	Source	Found in CGM webPRACTICE
06/06/2024	14:34:14	MEL	SAVE	26527	Bryant, Giselle	06-02-2024	36415	1	D49.2,L57.0,Z71.89,Z85.828,Z48.02	1	1		ALB	Import~568	Yes	Posted
06/06/2024	14:34:14	MEL	SAVE	26527	Bryant, Giselle	06-02-2024	99214	1	D49.2,L57.0,Z71.89,Z85.828,Z48.02	1	1		ALB	Import~568	Yes	Posted
06/06/2024	14:34:02	MEL	SAVE	26527	Bryant, Giselle	06-02-2024	99213	2	L57.8,L82.1,Z48.817	2	2		ALT	1	Import~569	Yes - Posted
06/06/2024	14:25:43	MEL	DELETE	26527	Bryant, Giselle	06-02-2024	36415	1	D49.2,L57.0,Z71.89,Z85.828,Z48.02	1	1		ALB	Import~566	Yes	Posted
06/06/2024	14:25:43	MEL	DELETE	26527	Bryant, Giselle	06-01-2024	36415	1	D49.2,L57.0,Z71.89,Z85.828,Z48.02	1	1		ALB	Import~566	No	

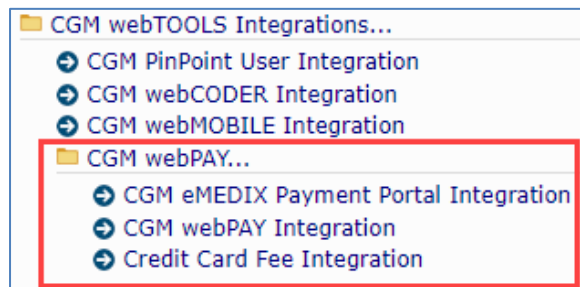
The **Print** Action Column button allows you to print the results on the screen to *Excel via MyReports*.

CGM webPAY

CGM eMEDIX is the new payment vendor and will be using Global Pay to replace TSYS. CGM webPAY automatically provides CGM eMEDIX Payment Portal functionality and Credit Card Fee functionality for clients using CGM webPAY through eMEDIX. New payment methods for Debit Card and Bank Account (ACH) payments have been added. In addition, device settlement will automatically happen every evening. An updated CGM webPAY User Guide will be available in CGM webPRACTICE Help when v2024.2.0 has been released.

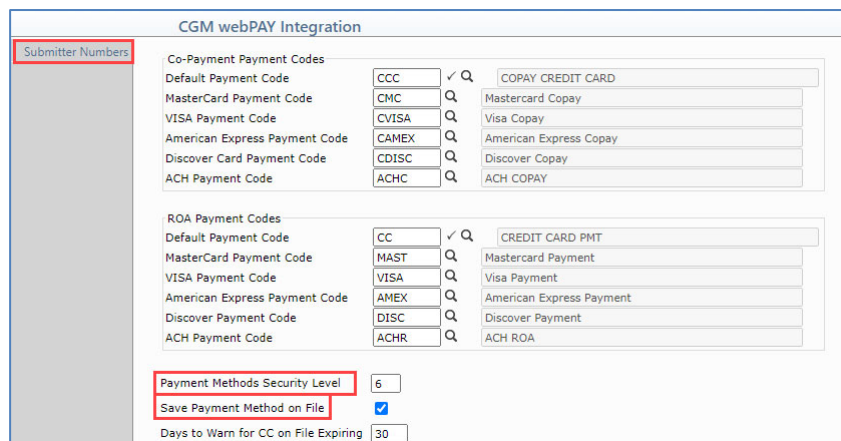
The following functionality changes were made to accommodate switching payment vendors:

The CGM webPAY related integration functions have been consolidated under *System > Database Maintenance Menu > Integrations > CGM webTOOLS Integrations > CGM webPAY*.



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

- The **Merchants** Action Column button changed to **Submitter Numbers**.
- The **Payment Devices** Action Column button was removed because it will no longer be necessary to enter Payment Device information in the system.
- The words Credit Card(s) have been replaced with **Payment Methods** in the **Credit Cards Security Level** and **Save Credit Card on File** fields.



The screenshot shows the 'CGM webPAY Integration' configuration page. The 'Submitter Numbers' tab is selected and highlighted with a red box. The page contains two sections for payment codes and two security-related fields.

Co-Payment Payment Codes		
Default Payment Code	CCC	✓ Q COPAY CREDIT CARD
MasterCard Payment Code	CMC	Q Mastercard Copay
VISA Payment Code	CVISA	Q Visa Copay
American Express Payment Code	CAMEX	Q American Express Copay
Discover Card Payment Code	CDISC	Q Discover Copay
ACH Payment Code	ACHC	Q ACH COPAY

ROA Payment Codes		
Default Payment Code	CC	✓ Q CREDIT CARD PMT
MasterCard Payment Code	MAST	Q Mastercard Payment
VISA Payment Code	VISA	Q Visa Payment
American Express Payment Code	AMEX	Q American Express Payment
Discover Payment Code	DISC	Q Discover Payment
ACH Payment Code	ACHR	Q ACH ROA

Payment Methods Security Level: 6

Save Payment Method on File:

Days to Warn for CC on File Expiring: 30



CGM webPAY (cont.)

Unposted Payments (Transactions > Unposted Payments)

Any red warning messages will now display starting in the **Source** column and Payment Plan requested messages have also been added.

Unposted Payments										
<input type="checkbox"/>	Status	Source	Account	Patient Name	Amount	Payment Date	Payment Type	Payment Code	Pmt Method	WP-Pmt Device
<input type="checkbox"/>		Payment Entry	23936	ANDERSON, ANDY	5.00 Credit	06-25-2024	ROA	WP-VISA ROA (WPVSR)	WP-Device	Front Office Device 1
<input type="checkbox"/>		CGM eMEDIX Payment Portal	25511	HANSEN, TIFFANY	867.16 Credit	06-19-2024	ROA	Payment Portal - Visa (OLV)	PP	
		Payment Plan requested via eMEDIX Payment Portal by patient on 06-19-2024 14:26:30. Payments of \$867.09 to be collected on the 1st day of the month using VISA. See Manage Payment Plans (Collections > Patient Collections > Manage Payment Plans).								
<input type="checkbox"/>		Check In/Out	32293	JONES, SAM	-9.00	06-13-2024	ROA	WP-ACH CHECK ROA (WPCKR)	WP	
		CGM webPAY: Check Returned								
<input type="checkbox"/>		Check In/Out	25984.1	DEER, JULIA	50.00 Credit	06-06-2024	Co-Payment	WP-MASTERCARD COPAY (WPMC)	WP	
		This Co-Pay must be posted manually. No Charge posted for Appointment and Dr.								

Manage Payment Plans (Collections > Patient Collections > Manage Payment Plans)

Upon accessing the function, the Summary page will now display any **Payment Plan** requested messages. If a payment plan is requested and the patient does not currently have a payment plan stored on their account, their account will display, but there will not be any information listed in the payment plan fields and the CGM webPAY column will display 'No' until you add the payment plan to the patient's account.

Manage Payment Plans										SYSTEM MANAGER Eastside Medical (1)
Acct#	Patient	Plan Started	Next Pmt Date	Next Pmt Amount	Last Pmt Amount	Last Pmt Date	# Days to Pay	Collection Status	CGM webPAY	
25979.1	RABBIT, SALLY	06-04-2024	08-04-2024	21.00	06-04-2024	21.00	30	NON-DELINQUENT PAYMENT PLAN (10)	Yes	
	Payment Plan requested via CGM webPAY Payment window on 06-04-2024 11:55:27 by SYSTEM MANAGER. Payments of \$21.00 to be collected on the 1st day of the month using VISA.									
25977.1	FOX, SAM	05-29-2024	06-28-2024	47.00	06-06-2024	37.60	30	NON-DELINQUENT PAYMENT PLAN (10)	Yes	
25511	HANSEN, TIFFANY			0.00	06-27-2024	11.00			No	
	Payment Plan requested via eMEDIX Payment Portal by patient on 06-19-2024 14:26:30. Payments of \$867.09 to be collected on the 1st day of the month using VISA.									

Manage Payment Plans (Collections > Patient Collections > Manage Payment Plans)

Work Accounts - Payment Plan Action Column button (Collections > Patient Collections > Work Accounts)

- Credit Card changed to Card/Account, **Merchant** field changed to **Submitter #**.
- Payment Plan Requested message: you can click the 'x' at the end of the message to delete it in the *Payment Plan* page or it will automatically delete when you click **Save**.

Start Date of Plan	06-04-2024
Payment Amount \$	21.00 ✓
Payment Days	30 ✓
Next Payment Date	08-04-2024
Last Payment Date	06-04-2024
Last Pmt Amount \$	21.00
Status for Default	11 NON-DELINQUENT PAYMENT PLAN FAILED (11) ✓
Statement Comment	
CGM webPAY	<input checked="" type="checkbox"/>
Submitter #	Eastside Medical (PBTX92161) ▼
Payment Method	VISA ending in 450644XXXXXX1933, Exp. Date: 12/2024 ▼
Card/Account Holder Name	SALLY RABBIT
Card/Account Holder Zip Code	85031
Payment Plan requested via CGM webPAY Payment window on 06-04-2024 11:55:27 by SYSTEM MANAGER. Payments of \$21.00 to be collected on the 1st day of the month using VISA. X	

CGM webPAY (cont.)

CGM webPAY Transactions (*Transactions > CGM webPAY Transactions*)

If you are currently using CGM webPAY using TSYS, after you have been switched to use eMEDIX, the **Settle** Action Column button will be removed, since *CGM webPAY Transactions* only pertains to TSYS payments that need to be settled.

CGM webPAY Transactions								System Manager EASTSIDE MEDICAL (1)	
Settled Transactions		Unsettled Transactions							
Add/Edit Filter		Ref #	Transaction Date/Time	Account	Patient Name	Amount	Transaction Type	Card Type	Payment Device
Remove Filter		745	03-11-2020 12:19P	25560	KESTERSON, RANDY	1.00	SALE	Visa	Shawn's Office
Print									

Change Patient Data (*Patient > Change Patient Data*)

The **Credit Cards** Action Column button was changed to **Payment Methods**.

All **Card** field names changed to **Card/Account**.

CGM webPAY Payment Methods						SYSTEM MANAGER Eastside Medical (1)
Add Payment Method	25977.1 - FOX, SAM					
Card/Account Type	Card/Account Number	Expiration Date	Card/Account Holder Name	Zip Code	Default Card/Account	
Checking	XXXXXX1221				No	
MASTERCARD	510510XXXXX5100	12/2024	SAM FOX	85021	Yes	

New functionality: You can't delete a payment method if it is stored on a payment plan. You must update the payment method on the payment plan first and then delete the payment method. The following message will display if you try to delete a payment method that is stored on a payment plan.

"A payment plan for this patient is using this payment method. You will need to either delete the payment plan or change the payment method stored on the payment plan before you can delete this payment method."



CGM webPAY (cont.)

Patient Detail to Excel (*Patient > Patient Listings > Patient Detail to Excel*)

The data element names and report column headings were changed from Credit Card to Card/Account.

- C1.0 – Card/Account Status
- C1.3 - Card Expire Date
- C1.4 - Card/Account Number
- C1.5 - Card/Account Type
- C1.8 - Card/Account Holder Name
- C1.9 - Card/Account Zip Code

	A	B	C	D	E	F	G	H
1	Eastside Medical							
2	Patient Detail to Excel							
3	From Patient	(Start from the First Patient)						
4	Thru Patient	(End with the Last Patient)						
5	From 05-01-2023 Through 05-31-2024							
6	Include Patients with No Activity N							
7	Account	Patient Name	Card/Account Status	Card/Account Type	Card/Account Holder Name	Card/Account #	Card Exp Date	Card/Account Zip Code
8	23936	ANDY ANDERSON	No card/account on file					
9	25977.1	SAM FOX	Valid card/account on file	MASTERCARD	SAM FOX	510510XXXXXX5100	12/2024	85021
10	25979.1	SALLY RABBIT	Valid card/account on file	VISA	SALLY RABBIT	450644XXXXXX1933	12/2024	85031
11	25980.1	RUFUS RABBIT	No card/account on file					
12								
13	End of Report. Patient/Lists/Patient Detail to Excel							
14	Requested by MGR and completed at 12:39PM on Jun 03 2024							
15								

Payment Entry (*Transactions > Payment Entry*)

Scheduling - Patient Check In/Out (*Schedule > Patient Check In/Out*)

After collecting payments in either of these functions and you print the receipt, it now prints in a simplified format.

```

PAYMENT ID: 2647

Batch #           000163
Trans ID          000000004766
Order ID          MER-714820f0-dd29-47
                  e4-b4d5-5250ce547573

Trans Type        Purchase
Date/Time         2024-05-08 14:56:53
Card Type         Visa
Card Number       XXXXXXXXXXXX1111
Entry Method      MANUAL
Approval Code     214532
AVS               Z
CVV               M

Total Amount      USD$30.00

Approved - Thank You

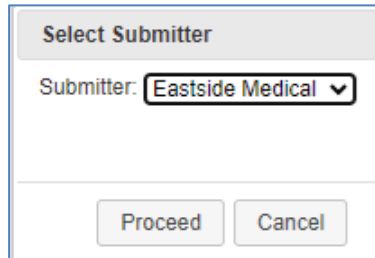
X _____
  Cardholder Signature

Buyer agrees to pay total amount above
according to cardholder's agreement with
issuer.

****Customer Copy****
    
```

CGM webPAY (cont.)

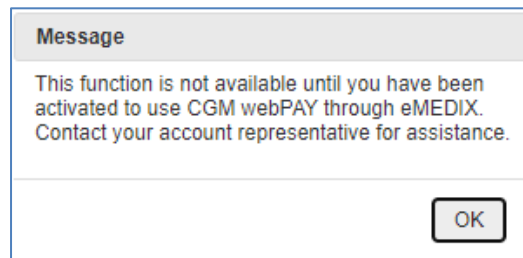
If multiple **Submitter Numbers** have been stored in the *CGM webPAY Integration* function, you will be prompted to select the **Submitter Number** you want to use for this transaction. The **Submitter Number** will default to the last one you selected.



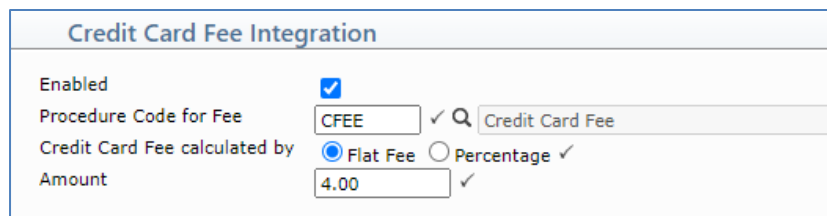
Credit Card Fee Integration Setup (*System > Database Maintenance Menu > Integrations > CGM webTOOLS Integration > CGM webPAY > Credit Card Fee Integration*)

When collecting a payment in the *Patient Check In/Out (Schedule > Patient Check In/Out)* function using CGM webPAY, a credit card fee can now be automatically collected along with the payment. The amount of the credit card fee can be either a flat fee or a percentage. **Note:** *This functionality is only available after CGM webPAY through eMEDIX has been activated.*

If you want to use the credit card fee functionality, you will need to complete fields in the *Credit Card Fee Integration* function first (*System > Database Maintenance Menu > Integrations > CGM webTOOLS Integration > CGM webPAY > Credit Card Fee Integration*). If you try to access this function and CGM webPAY through eMEDIX has NOT been activated, you will receive the following message:



Upon accessing the function complete the following fields:

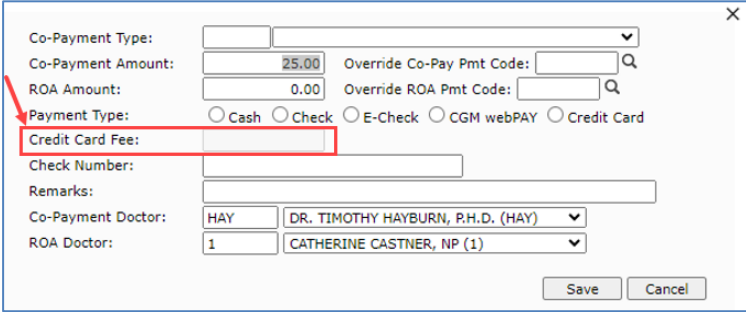


CGM webPAY (cont.)

- **Enabled** – Select the check box to enable the functionality.
- **Procedure Code for Fee** – Select which Procedure Code to use for credit card fees. **Note:** The procedure code should be set to 'N' for **Bill to Insurance** in the *Procedure Code Table*.
- **Credit Card Fee calculated by** – Select the applicable option if the credit card fee should be a Flat Fee or a Percentage.
- **Amount** – Enter the amount of the credit card fee. If you selected Flat Fee above, enter the amount in the format of 0.00. If you selected Percentage above, enter the percentage number without the percent % sign (for example, if you want to collect 3 percent, only enter 3. If you want to charge 3.25%, you can enter 3.25).

Patient Check In/Out (*Schedule > Patient Check In/Out*)

Collecting a Payment and Credit Card Fee - When collecting a payment in the *Patient Check In/Out* function for patients with appointments, the new **Credit Card Fee** field will display under the **Payment Type** options. This field will be visible but only enabled if the *Credit Card Fee Integration* is enabled and CGM webPAY is selected. **Note:** Since a **Doctor** and **Location** code are required to post the **Credit Card Fee**, that information comes directly from the patient's appointment. If you use the **Select Patient** Action Column button and collect a payment for an account without an appointment, the **Credit Card Fee** field is not available.

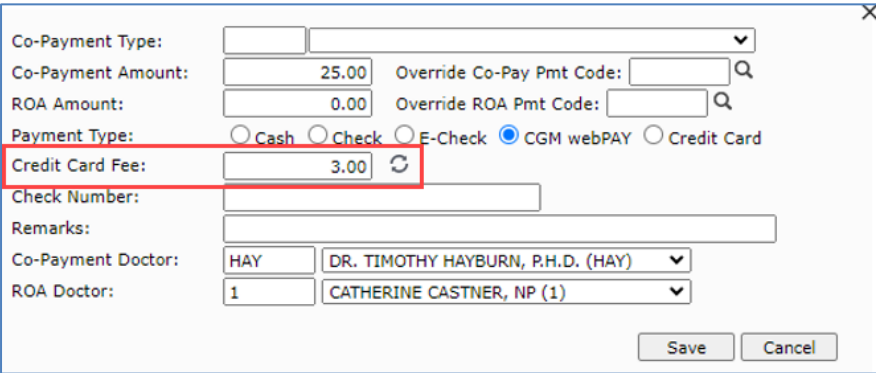


The screenshot shows a form window with the following fields and values:

- Co-Payment Type: [Dropdown]
- Co-Payment Amount: 25.00
- Override Co-Pay Pmt Code: [Search]
- ROA Amount: 0.00
- Override ROA Pmt Code: [Search]
- Payment Type: Cash Check E-Check CGM webPAY Credit Card
- Credit Card Fee: [Disabled field]
- Check Number: [Text]
- Remarks: [Text]
- Co-Payment Doctor: HAY | DR. TIMOTHY HAYBURN, P.H.D. (HAY)
- ROA Doctor: 1 | CATHERINE CASTNER, NP (1)

The "Credit Card Fee" field is highlighted with a red box and a red arrow pointing to it, indicating it is currently disabled.

After you enter the payment amount(s) and select **CGM webPAY** for the **Payment Type**, the **Credit Card Fee** field will be enabled and automatically populated with an amount based on the data you entered in the Credit Card Fee Integration. Example with \$3 flat fee after selecting CGM webPAY.



The screenshot shows the same form window as above, but with the following changes:

- Payment Type: Cash Check E-Check CGM webPAY Credit Card
- Credit Card Fee: 3.00 (with a refresh icon)

The "Credit Card Fee" field is now enabled and populated with the value 3.00, highlighted with a red box.

CGM webPAY (cont.)

Once the **Credit Card Fee** field is enabled, you can modify it or clear it out if you want. You can also use the **Calculate** icon to the right of the field, if you want to recalculate the fee. For example, if you are charging a percentage and if you modified the co-payment or ROA amount, you would want to recalculate the fee. You may also need to delete the credit card if you are collecting a payment using a debit card or check. After you confirm the amount is correct, click **Save**. The payment information will display as usual along with the credit card fee.

Sta	Payment Date	Payment	Amount	Type	Check#	Dr	Remarks
	07-22-2024	Co-Payment	25.00	CGM webPAY		HAY	
	07-22-2024	ROA	3.00	CGM webPAY		1	Credit Card Fee

The credit card fee will be listed on as a separate ROA line item with **Credit Card Fee** listed in the remarks. Click **Save** to proceed with collecting the payment.

When the CGM webPAY payment window displays, the total payment amount of \$28 will be collected.

Payment

1 ————— 2 ————— 3

Initiate Payment Enter Payment Details Confirmation

Payment Identifier

Submitter

Total Patient Balance

Select Number of Months

Future Monthly Payment Date

Payment Amount

Save Payment Method On File

Select Payment Method

Key In Values Manually (Check)

Front Office Device 1

Billing Office Device 1

Key In Values Manually (Credit Card)

Front Office Device 2

Billing Office Device 2

Cancel

Next

CGM webPAY (cont.)

After you have completed collecting the payment and printed the receipt, the credit card fee procedure and payment are automatically posted to the patient's account and the following message will display.

The Credit Card Fee and payment have been posted to the account.

OK

The transaction status now shows a **C** in the **Sta** column to indicate that the payment has been collected in the *Patient Check In/Out* screen and the ROA for the Credit Card Fee payment no longer displays since it has been posted. Click **Save**.

Note: Immediately after the payment is processed the remainder of the payment is stored in *Unposted Payments*.

Sta	Payment Date	Payment	Amount	Type	Check#	Dr	Remarks
C	07-22-2024	Co-Payment	25.00	CGM webPAY		HAY	

If for any reason you need to void the credit card fee payment after it is collected, you will need to manually reverse the credit card fee charge on the account. **Note:** In the above example, since the CGM webPAY payment was split into two payments, you will need to wait until the next day to either void or partially refund either of the payments. The payments must be settled first which doesn't happen until the end of the day.

Encounter 33628 - 07/22/2024 ▼

Case 0 - Not applicable
Billing Group SCK

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

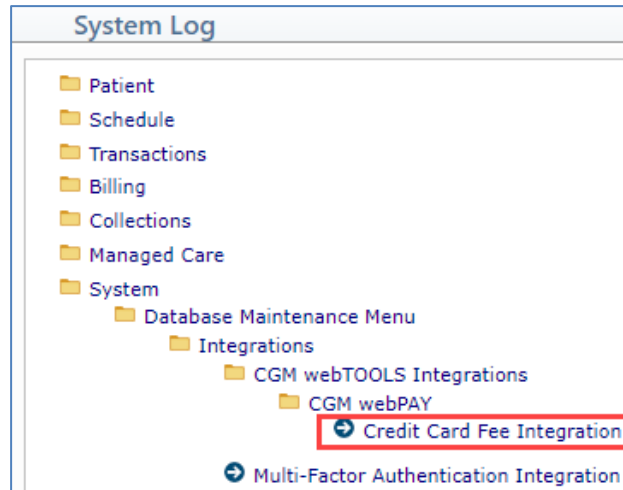
+ <input type="checkbox"/>	Service Date	Code	Description	\$ Charge
+ <input type="checkbox"/>	07/22/2024	CFEE	Credit Card Fee	\$3.00

Last Saved 07/22/2024 03:39PM by MGR Totals: \$3.00

CGM webPAY (cont.)

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

When any changes are made to the Credit Card Fee Integration, they will be stored in the System Log.



The changes will be listed including the Date/Time the change was made, the Database (DB), the User code of the person that made the change and the details of the change that was made. You can use the **Add/Edit Filter** Action Column button to filter the results as needed.

System Log		System Manager EASTSIDE MEDICAL (1)		
Add/Edit Filter	System/Database Maintenance Menu/Integrations/CGM webTOOLS Integrations/CGM webPAY/Credit Card Fee Integration			
Remove Filter	Date/Time ▲	DB	User	Message
	07-29-2024 12:15PM	1	MGR	Amount changed From: 5.00, To: 3.25
	07-29-2024 12:15PM	1	MGR	Credit Card Fee calculated by changed From: Flat Fee, To: Percentage
	07-29-2024 12:13PM	1	MGR	Amount set to: 5.00
	07-29-2024 12:13PM	1	MGR	Credit Card Fee calculated by set to: Flat Fee
	07-29-2024 12:13PM	1	MGR	Procedure Code for Fee set to: Credit Card Fee (CFEE)
	07-29-2024 12:13PM	1	MGR	Credit Card Fee Integration set to Enabled.