What's New in

CGM webPRACTICE™ v2024.2.0

Updated Final Release Notes

August 20, 2024

© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**

Table of Contents

Introduction 3

New Features and Enhancements 4

Summary of Action Required Items 4

Summary of Changes to Document 4

Collections 5

Reports 6

System 8

Tables 9

Transactions 10

CGM webPAY 11

© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**

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.

© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**

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	Deleted – functionality removed from the update.
CGM webPAY	Patient Check In/Out	Deleted

© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**

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

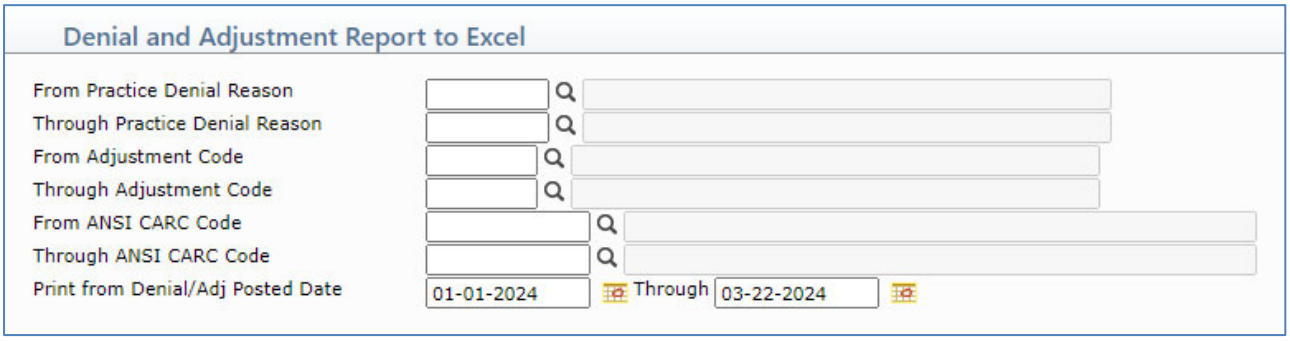
Note: The date and time for any activity will only be available for actions taken after the 2024.2.0 update has been installed.

© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**

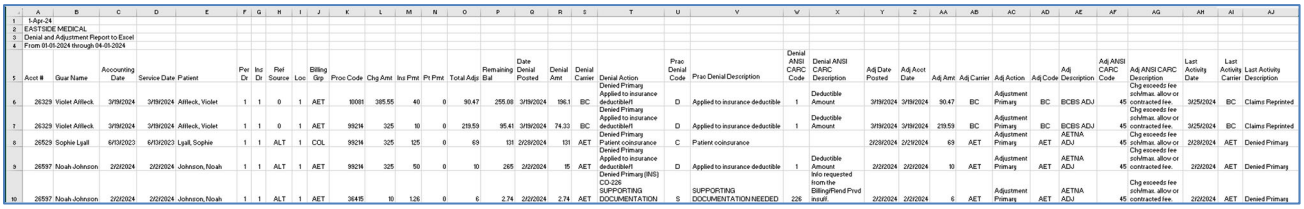
Reports

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.



Sample Report



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ
1	1-Apr-24																																			
2	EASTSIDE MEDICAL																																			
3	Denial and Adjustment Report to Excel																																			
4	From 01-01-2024 through 04-01-2024																																			
5	Acct #	Guar Name	Accounting Date	Service Date	Patient	Per Dr	Ins Dr	Ref Source	Loc	Billing Grp	Proc Code	Chg Amt	Ins Pmt	Pt Pmt	Total Adjs	Remaining Bal	Date Denial Posted	Denial Amt	Denial Carrier	Denial Action	Prac Denial Code	Prac Denial Description	Denial ANSI CARC Code	Denial ANSI CARC Description	Adj Date Posted	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 Carrier	Last Activity Description
6	26329	Violet Attleck	3/19/2024	3/19/2024	Attleck, Violet	1	1	0	1	AET	10091	385.55	40	0	90.47	255.08	3/19/2024	196.1	BC	Denied Primarg Applied to insurance deductible!!	D	Applied to insurance deductible	1	Deductible Amount	3/19/2024	3/19/2024	90.47	BC	Adjustment Primarg	BC	BCBS ADJ	45	Chg exceeds fee sch/max. allow or contracted fee.	3/25/2024	BC	Claims Reprinted
7	26329	Violet Attleck	3/19/2024	3/19/2024	Attleck, Violet	1	1	0	1	AET	99214	325	10	0	219.59	95.41	3/19/2024	74.33	BC	Denied Primarg Applied to insurance deductible!!	D	Applied to insurance deductible	1	Deductible Amount	3/19/2024	3/19/2024	219.59	BC	Adjustment Primarg	BC	BCBS ADJ	45	Chg exceeds fee sch/max. allow or contracted fee.	3/25/2024	BC	Claims Reprinted
8	26529	Sophie Lgall	6/13/2023	6/13/2023	Lgall, Sophie	1	1	ALT	1	COL	99214	325	125	0	69	131	2/29/2024	131	AET	Denied Primarg Patient coinsurance	C	Patient coinsurance			2/29/2024	2/29/2024	69	AET	Adjustment Primarg	AET	AETNA ADJ	45	Chg exceeds fee sch/max. allow or	2/28/2024	AET	Denied Primarg
9	26597	Noah Johnson	2/2/2024	2/2/2024	Johnson, Noah	1	1	ALT	1	AET	99214	325	50	0	10	265	2/2/2024	15	AET	Denied Primarg Applied to insurance deductible!!	D	Applied to insurance deductible	1	Deductible Amount	2/2/2024	2/2/2024	10	AET	Adjustment Primarg	AET	AETNA ADJ	45	Chg exceeds fee sch/max. allow or contracted fee.	2/2/2024	AET	Denied Primarg
10	26597	Noah Johnson	2/2/2024	2/2/2024	Johnson, Noah	1	1	ALT	1	AET	36415	10	1.26	0	6	2.74	2/2/2024	2.74	AET	Denied Primarg (INS) CO-226 SUPPORTING DOCUMENTATION	S	SUPPORTING DOCUMENTATION NEEDED	226	Info requested from the Billing/Rend Prvd insufficient.	2/2/2024	2/2/2024	6	AET	Adjustment Primarg	AET	AETNA ADJ	45	Chg exceeds fee sch/max. allow or contracted fee.	2/2/2024	AET	Denied Primarg

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.

© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**

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.

© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**

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*.

© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**

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

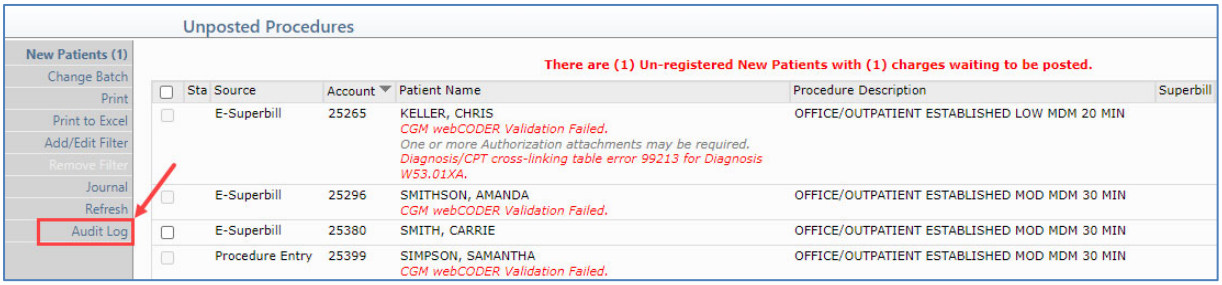
The updated files are available for import by selecting 2023 in the **Fee Schedule Year** list and the applicable file name in the **Fee Schedule File** list.

© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**

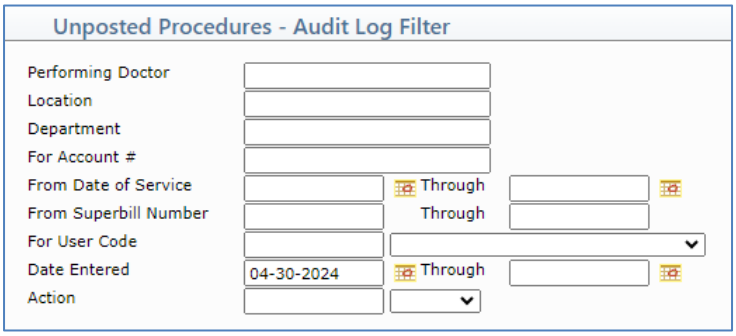
Transactions

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.

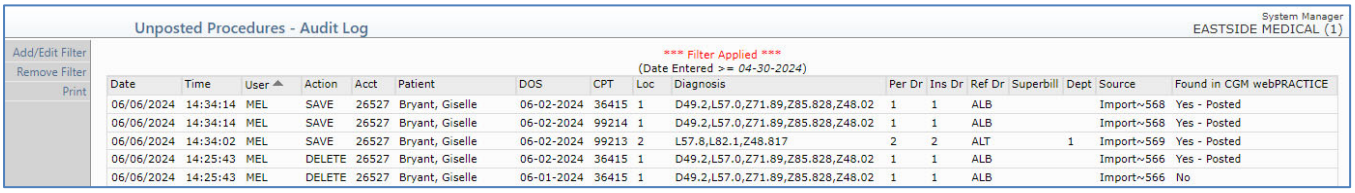


When you access the function, a Filter is automatically applied to display the activity for the last 90 days, but you can edit the Filter as needed. **Note**: The fields in the filter do not use the standard table look-ups because codes that come over in an interface may not exist in the Tables yet – 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.



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.



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

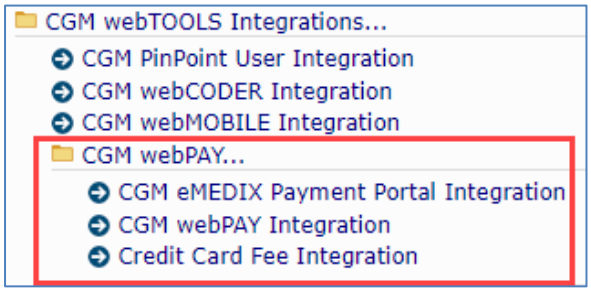
© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**

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 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.

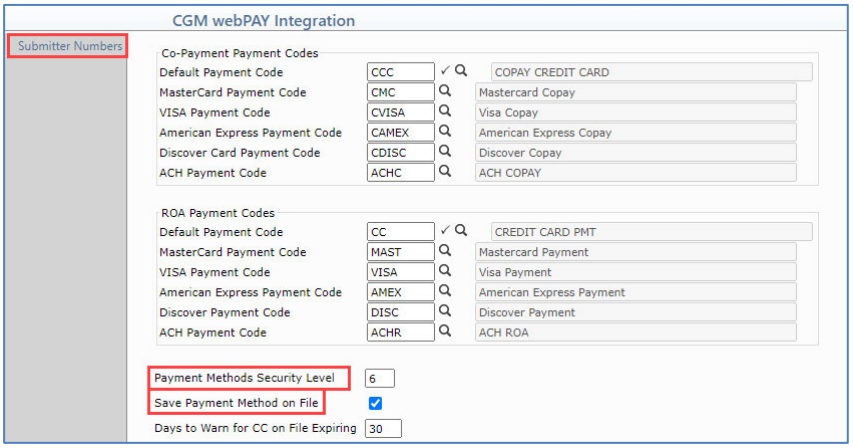
The following functionality changes were made to accommodate switching payment vendors:

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.

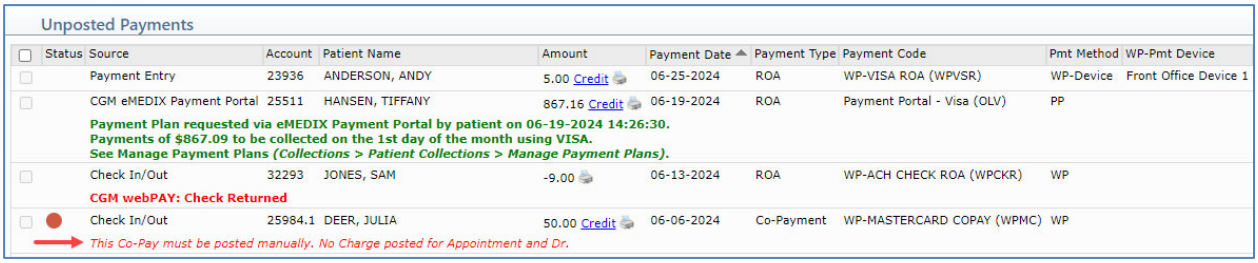


© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**

CGM webPAY (cont.)

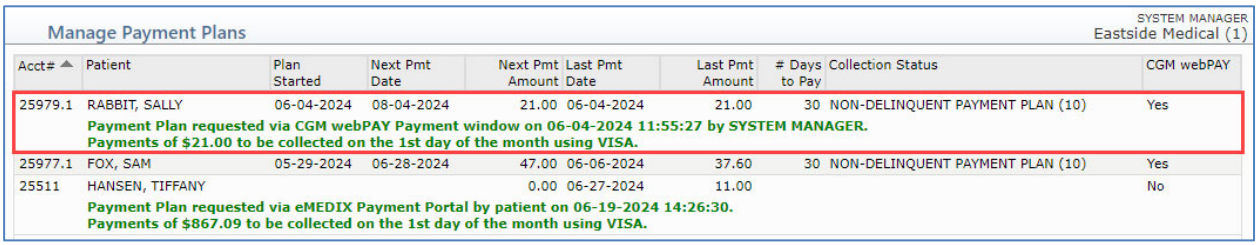
Unposted Payments *(Transactions > Unposted Payments)*

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



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

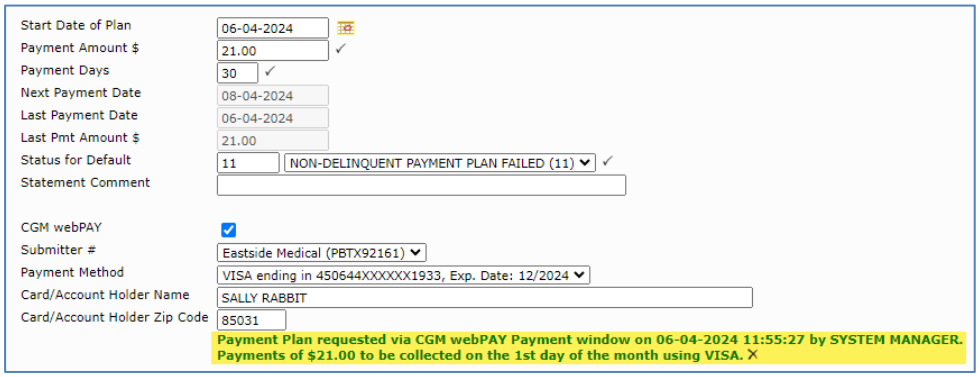
Upon accessing the function, the Summary page will now display any **Payment Plan** requested messages. If a payment plan is requested and the patient does not currently have a payment plan stored on their account, their account will display, but there will not be any information listed in the payment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



Manage Payment Plans *(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**.

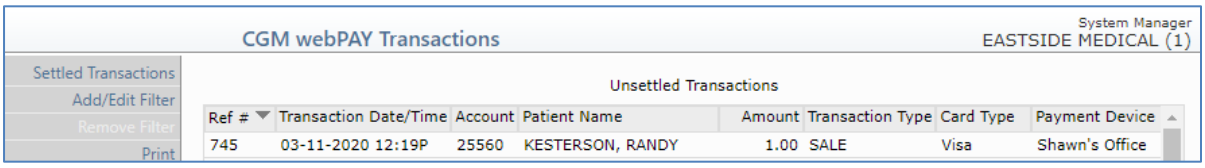


© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**

CGM webPAY (cont.)

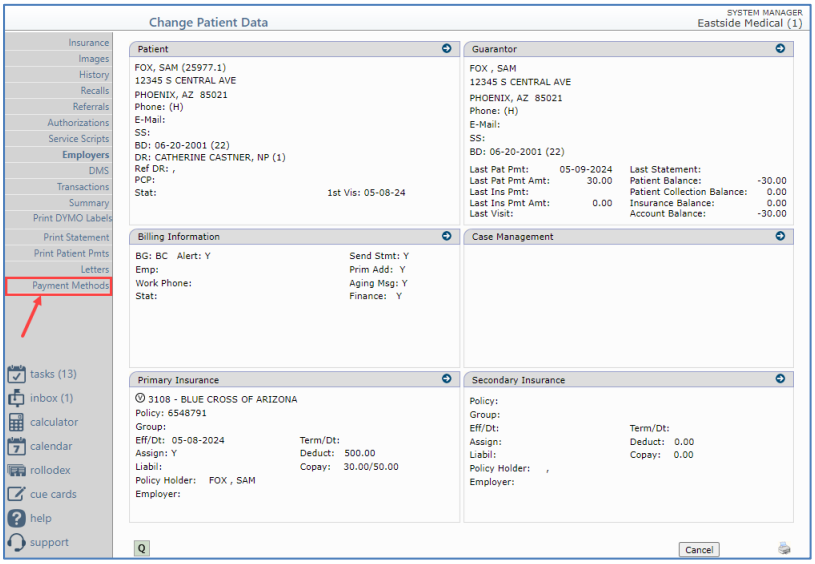
CGM webPAY Transactions *(Transactions > CGM webPAY Transactions)*

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.

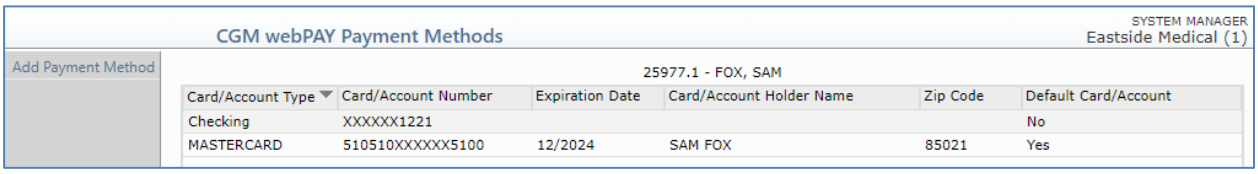


Change Patient Data *(Patient > Change Patient Data)*

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



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



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."

© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**

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)*

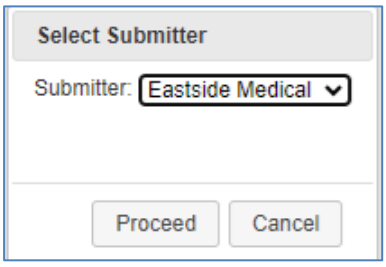
After collecting payments in either of these functions and you print the receipt, it now prints in a simplified format.

```
          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****
```

© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**

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.



© Copyright 2024 CompuGroup Medical, Inc. All rights reserved. | May not be reproduced without prior written permission. | **www.cgm.com/us**