What’s New in

CGM webPRACTICE™ v7.4.6

Updated Final Release Notes

Updated Document October 15, 2014

Hosted Clients Release Date: October 16, 2014

Self-hosted Clients Release Date: October 22, 2014

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 v7.4.6. Each section defines the specific feature and/or enhancement associated with the new CGM webPRACTICE release, as well as any resolved issues.

Note: You will notice that there are fewer release notes for the 7.4.6 release as compared to prior releases. In this release we focused on implementing improvements to the program structure and background stabilization platform to further enhance performance. Our goal was to provide a more satisfying user experience and increased accuracy, which didn't necessarily result in new features or visual changes. Additionally, our team has made enhancements that will serve as a solid foundation for new features and functionality in the near future.

Additional release notes that were not available at the time of the Beta release of 7.4.6 have been added in the "Additional 7.4.6 Release Notes" section starting on page 12.

NEW FEATURES AND ENHANCEMENTS

This section is not meant to be cumulative and only contains information associated with the CGM webPRACTICE v.7.4.6 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 service packs and 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
8	Load the AMA HCPCS Codes	Load the updated files if applicable.
8	Import Fee Schedules	Import the updated files if applicable.
9	Load the AMA ICD-9-CM Codes ®	Load the updated files if applicable.

Billing

Print Exception Report **Released in Patch 7.4.5.10 on 9-1-2014*

A new "*Dx xxx in the UB-04 Attachment is invalid*" Exception has been created to catch claims that have been refiled that were originally saved with invalid diagnosis codes prior to the installation of Patch # 7.4.5.10. For additional information, see the **Procedure Entry Function** entry under the *Transactions* section of these release notes.

Print Insurance Forms (*Insurance Billing Functions*)

The CMS-1500 (02/12) form has been updated to include the *CA Workman's Comp* requirements that went into effect 4/1/2014. These updates were released in Patch # 7.4.5.6 on July 30, 2014.

- **Box 11-Insured's Policy Group or FECA Number**: the **Claim Number** stored in the Case Record will no longer print. Instead, the **Policy Number** for the insurance policy will print if the **Policy Holder is Employer** check box is selected, otherwise this box will be left blank.

- **Box 11b-Other Claim ID**: the qualifier **Y4** will print and the **Claim Number** stored in the Case Record will print. Previously, this box was left blank.

- **Box 19-Additional Claim Information**: if there is a claim level **Additional Paperwork Attached** Attachment stored on the Encounter, the **Attachment Report Type Code, Attachment Transmission Code** and the **Attachment Control Number** will print, preceded by **PWK** with no spaces between any of the values. For example, 'PWKOZFX1234567'.

- **Box 22 Resubmission Code**: Previously, box 22.1 printed the **Resubmission Code** followed by the **ICN Number** and box 22.2 also printed the **ICN Number**. This has been changed so that if a **Resubmission Code** was entered when the claim was Refiled, the **Resubmission Code** will print, followed by a **dash** (**-**) and then the **ICN Number**.

Schedule

webReminder Results *New Functionality*

Two new Confirmation Result types have been added for the new Email and Text webReminder options. For additional information, see the *webReminder Integration* entry under the *System* section of these release notes. These updates were released in Patch # 7.4.5.13 on September 17, 2014.

webReminder Results

Account	Patient	Call Type	Result	Result Date
23936	Anderson, Andy	1st Appt Reminder	Contacted by Email	08-29-2014
25755	KESTERSON, SENSAY	1st Appt Reminder	Answered by Std. Machine	08-29-2014
32308	KESTERSON, DEE	1st Appt Reminder	Contacted by Text Message	08-29-2014

Notes:

- There are only two possible confirmation results that CallPointe will return for email and text message reminders; "*Contacted by Email*" or "*Contacted by Text Message*". This behavior is different than the results returned when patients receive phone reminders which inform you if the patient responded or not.

- The webReminder changes made do not mean that existing webReminder clients can automatically switch to sending emails and text messages to their patients. These changes only lay the groundwork for this to be possible. In the near future CGM will contact webReminder clients to start the process of switching over to the new web service method of sending and also testing the email/text functionality.

System

webReminder Integration *(Database Maintenance Menu, Integrations, webTools Integrations)* ***New Functionality***

In preparation of switching webReminder clients over to the new web service that allows email and text reminders to be sent to patients, two new **Confirmation** fields for email and text have been added. These fields control which *Patient Status/Location* code displays in the **Status** field in the patient's appointment and should correspond with the confirmation result from CallPointe when email or text reminders are sent. For additional information, see the *webReminder Results* entry under the *Schedule* section of these release notes. These updates were released in Patch # 7.4.5.13 on September 17, 2014.

Notes:

- There are only two possible confirmation results that CallPointe will return for email and text message reminders; "*Contacted by Email*" or "*Contacted by Text Message*". This behavior is different than the results returned when patients receive phone reminders which inform you if the patient responded or not.

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Tables

Maintain Insurance Carriers *(Insurance Carrier Table)* ***New Functionality***

A new **HPID** field has been added to prepare for the use of Health Plan IDs in the future. The field is informational only at this time and will be activated in a future release.

Note: The Department of Health and Human Services and the Centers for Medicare and Medicaid Services released a Final Rule in August 2012 regarding the implementation of the Health Plan Identifier. This final rule adopts the standard for a national unique health plan identifier (HPID) and establishes requirements for the implementation of the HPID. In addition, it adopts a data element that will serve as an "other entity" identifier (OEID), or an identifier for entities that are not health plans, health care providers, or individuals, but that need to be identified in standard transactions.

All Health Plans (except small health plans must obtain an HPID by November 5, 2014. Small Health Plans must obtain an HPID by November 5, 2015. The current date that the HPID is required in the standard transactions is November 7, 2016.

The industry is still unclear on the details of how this number will be used, but since small plans will have their HPIDs this fall, we are providing a place to at least store the number in the meantime.

Maintain Ins Plan Codes *(Insurance Carrier Table, Insurance Plan Table)* ***New Functionality***

A new **HPID** field has been added to prepare for the use of Health Plan IDs in the future. The field is informational only at this time and will be activated in a future release.

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

Updates to the 2014 HCPCS data files, effective July 1, 2014 are available for clients who have purchased that code set. To receive the updated codes you must reload the 2014 file. These files were released in Patch #7.4.5.5.

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

Updates to the 2014 HCPCS data files, effective October 1, 2014 are available for clients who have purchased that code set. To receive the updated codes you must reload the 2014 file.

Import Fee Schedules *(Fee Schedule Tables)* – *****Action Required*****

The Centers for Medicare and Medicaid Services (CMS) have released the 2014 Medicare Physician Fee Schedule effective July 1, 2014. The updated files are available for import by selecting 2014 in the **Fee Schedule Year** list and the applicable file name in the **Fee Schedule File** list. These files were released in Patch #7.4.5.5.

Tables (cont.)

Load the AMA ICD-9-CM Codes ® *(Diagnosis Code Table)* *****Action Required*****

The updated 2015 ICD-9-CM codes, effective October 1, 2014 are available for loading. There were no changes between the 2014 codes and the 2015 codes, so if you have already purchased and loaded the 2014 codes you do not need to load the 2015 codes. If you would like to purchase the 2015 code set, contact customer service.

Transactions

Import and Post ERA Files (*Electronic Remittance Advice (ERAs)*)

Updates have been made for the *Procedure code does not match* and *Item not in open index* ERA exception errors. The *Procedure code does not match* error message has been changed to *Procedure code does not match remit* and the *Item not in open index* error message has been changed to *Procedure not in open index-not posted*.

Previously, when a payment was placed on the Exception report because the procedure code(s) and modifier(s) on the ERA did not match the transaction(s) on the patient's account, it was listed under the *Item not in open index* error when it should have been for the *Procedure code does not match remit* error. This has been resolved and the *Procedure not in open index-not posted* error will only print for situations when the procedure does not have any remaining balance owed on it and the *Procedure code does not match remit* error will include situations when the procedure code(s) and modifier(s) on the ERA do not match the transaction(s) on the patient's account.

Additionally the Excel version of the Exception report will now print the following in the **Explanation/Tip** field for each error.

> **Procedure code does not match remit**: *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 and Modifiers). This payment will need to be manually allocated and posted.*
>
> **Procedure not in open index-not posted:** *The procedure does not have a balance remaining on it and will need to be manually allocated and posted.*

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

Previously, ERA files would not import because some payers started reusing their ERA filenames. Unique filenames are a requirement, so modifications had to be made to make sure that ERA payments would be posted properly. Now, if an ERA file is imported and it has the same filename as a previously imported file, the new file will be renamed to ensure the filename is unique.

Transactions (cont.)

Procedure Entry Function

Previously, the **UB-04 Information (5010 Only) Attachment** would allow the free-text entry of diagnosis codes that may not have existed in the *Diagnosis Code Table*. This has been resolved and now every diagnosis code entered in the Attachment must already exist in the *Diagnosis Code Table.*

For additional information, see the **Print Exception Report** entry under the *Billing* section of these release notes.

Transaction Journals to Excel (*Transaction Journals*) ***New Functionality***

A new **Posting Date** column has been added when printing the Payment Journal to Excel. This shows the date the payment was actually posted, which could be different from the Accounting Date and Payment Date entered on the transaction. This enhancement was released in Patch # 7.4.5.6 on July 30, 2014.

Transaction Journals to Excel *(Transaction Journals)* ***New Functionality***

These reports have been enhanced and will now print the Billing Group stored for each transaction when printing either the **Procedure** or **Adjustment** Journal to Excel.

ADDITIONAL 7.4.6 RELEASE NOTES

Billing

Print Exception Report (*Insurance Billing Functions, Electronic Claims*)

The report was listed internally as an 'Active Report', which was incorrect and that prevented the report from generating in MyReports. This has been resolved.

Transactions

Print Refund Checks

Previously, if you selected an individual check from the list of refund checks to edit or review the information, the **Check Date** would not display. This has been resolved.