



**CompuGroup™**  
Medical

**What's New in**

**CGM webPRACTICE™ v7.4.19**

**Final Release Notes**

**March 13, 2018**

**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 v7.4.19. 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 v.7.4.19 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
8 & 9	Import Fee Schedules	Load the updated files if applicable.
9	Load the HCPCS Codes	Load the updated files if applicable.
9	Import the RVU Unit Values	Load the updated files if applicable.

### Summary of Changes to Document

Version 1 of Preliminary Public Release Notes released March 6, 2018.

Section	Function	Added/Deleted/Revised
Tables	<b>Load the HCPCS Codes</b>	Revised

## Patient

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### Change Patient Data

#### **DMS – CGM CONNECT Record \*CGM CONNECTION™ Clients Only\***

The first time you access the DMS CONNECT Record for a patient, the values displayed in the screen have not been saved on the patient's account yet, they are simply the system default values. To prevent confusion, a new warning message has been added to inform you if the values displayed have not yet been saved if you click **Cancel** instead of **Save** when exiting the function. For additional information, see the *CGM CONNECTION Integration* entry under the *System* section of these release notes.

#### **DMS-Family Income Data Record**

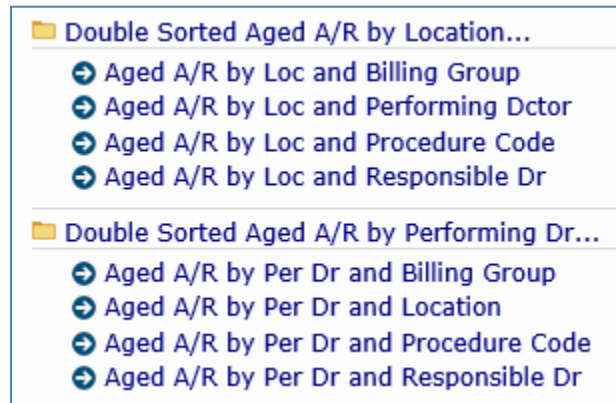
Modifications were made to properly display the values stored in this record. In some situations, the record was stored as a 'static' record instead of 'historical', which would prevent some of the stored values (from the **Public Housing Program** field through the **Poverty Level** field) from displaying.

## Reports

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### Double Sorted Aged A/R by Location and Double Sorted Aged A/R by Performing Dr (Aged Accounts Receivable (A/R) Reports, Sorted Aged A/R Reports)

Each available sorting option for these reports has been enhanced so you can print it to *Microsoft Excel via MyReports*.



### Transaction Journals Summary to Excel (Transaction Journals)

New columns have been added for **Non Facility Allowed Amount** and **Facility Allowed Amount**. The amounts for these columns are calculated by taking the allowed amount stored in the Fee Schedule for patients' primary insurance carriers for the procedure dates of services and then multiplying that amount by the quantity of transactions.

If there are no defined allowed amounts in the Fee Schedule for a primary carrier or if a patient does not have insurance and is self-pay, the allowed amount used for both Facility and Non-Facility charges will be the actual amount charged for those transactions.

### Global Journals to Excel (Corporate Reports)

When the Payment option is selected, a new **User of Paid Transaction** column has been added, which will print the User Code of the staff member that originally posted the procedure the payment was applied towards. In addition, the headings for the **Code of Paid Transaction** and **Actual Date Posted** columns have been changed to **Procedure Code of Paid Transaction** and **Actual Date Transaction Posted** to provide more precise descriptions.

## System

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### **Patient Check In/Out Integration** (*Database Maintenance Menu, Integrations, Schedule Integrations*)

New **Default Co-Pay Payment Code** and **Default ROA Payment Code** fields have been added to the **Additional Payment Type** section.

### **CGM CONNECTION Integration** (*Database Maintenance Menu, Integrations*) \***CGM CONNECTION Clients Only\***

A new **Default Reminder Type** field has been added so you can select which type of appointment reminder you want sent to every patient, unless there is an overriding value stored for **Contact Preferences** in the *DMS CONNECT Record* on a patient's account. For additional information, see the *DMS CONNECT Record* entry under the *Patient* section of these release notes.

**Note:** If a value is currently stored in the *Defaults, Fixed and Required Fields* function for the **Contact Preferences** field in the *DMS CONNECT Record* when this update is installed, that value will be automatically stored as the **Default Reminder Type** in the *CGM CONNECTION Integration* function.

## Tables

### Import Fee Schedules (Fee Schedule Table)

The Medicare Durable Medical Equipment files are now available for importing; Prosthetics/Orthotics and Supplies (DMEPOS) and Parenteral and Enteral Nutrition (DMEPEN). When you import a DME Medicare Fee Schedule, you must always use the **same Fee Schedule Code** that you use for the regular Medicare Physician Fee Schedule and the **same Effective Date**.

Maintain Fee Schedules	
Fee Schedule Code	MED ✓
Description	MEDICARE ALLOWABLES ✓
Adjustment Code	MED ✓ Q MEDICARE ADJ
Effective Date	01-01-2017 📅
Based On	Procedures ✓

After you have selected the Fee Schedule Code, you can proceed to import the Medicare DME Fee Schedule. The Medicare DME Fee Schedule files are labeled **MedicareDMEPOS** and **MedicareDMEPEN**, so you can easily differentiate from the standard Physician and Lab Fee Schedule files.

Import Fee Schedules		System Manager EASTSIDE MEDICAL (1)
This function is used to import Fee Schedules. CompuGroup Medical USA is in no way responsible for the data contained in the files.		
Warning: This program will overwrite the current fee schedule values if you already have them loaded into the selected Fee Schedule for the selected Effective Date.		
Fee Schedule Year	2017 ✓	
Fee Schedule State	Arizona (AZ) ✓	
Fee Schedule File	MedicareDMEPOS - Locality 00 - Effective 01/01/2017 (23) ✓	
Effective Date	01-12-2018 📅 ✓	
Provider Status	<input checked="" type="radio"/> Participating <input type="radio"/> Non-Participating ✓	
Fee Schedule Code	MED MEDICARE ALLOWABLES (MED) ✓	

**Note:** Since the standard Physician Fee Schedule is updated quarterly, **each time you import the updated Physician fee schedule with a new Effective Date, you will have to also re-import the DME fee schedules using that same Effective Date.** This will allow the fee schedule to pull the correct allowed amounts in Payment Entry.



## Tables (cont.)

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### **Import Fee Schedules (*Fee Schedule Tables*)\*\*\*Action Required\*\*\***

The Centers for Medicare and Medicaid Services (CMS) have released the following Fee Schedules:

- 2017 Medicare Physician Fee Schedule, effective October 1, 2017
- 2018 Medicare Physician Fee Schedule, effective January 1, 2018
- 2018 Medicare Clinical Laboratory Fee Schedule, effective January 1, 2018
- 2018 Medicare DME Fee Schedules; Prosthetics/Orthotics, and Supplies (DMEPOS) and Parenteral and Enteral Nutrition (DMEPEN), effective January 1, 2018

These updates were released in Patch # 7.4.18.6 on January 16, 2018. The updated files are available for import by selecting 2018 in the **Fee Schedule Year** list and the applicable file name in the **Fee Schedule File** list.

### **Import RVU Unit Values (*Relative Value Schedule Table*) \*\*\*Action Required\*\*\***

The Centers for Medicare and Medicaid Services (CMS) have updated the 2017 Medicare Relative Value Unit files (RVUs) effective October 1, 2017 and the 2018 RVUs effective January 1, 2018. To receive the updated codes you must load the **2017** file and the **2018** file. These updates were released in Patch # 7.4.18.8 on January 30, 2018.

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

Updates to the 2018 HCPCS data files, effective January 1, 2018 are available. To receive the updated codes you must load the 2018 file. These updates were released in Patch #7.4.18.8 on January 30, 2018.

### **Load the AMA CPT<sup>®</sup> Codes and Load the HCPCS Codes**

Any 'new' procedure codes imported from these functions will now be automatically added to the current 'Prices' Effective Date.

### **Maintain Insurance Carrier Codes (*Insurance Carrier Table*)**

The **E-Tertiary** check box has been temporarily removed. It was initially added to prepare for a future update for sending tertiary claims electronically but until the full functionality has been completed, the field will not be available.

### **Maintain Insurance Denial Codes (*Insurance Denial Code Table*)**

The updated Claim Adjustment Reason Codes (CARC) and Remittance Advice Remark Codes (RARC), effective November 1, 2017 have been loaded into CGM webPRACTICE. These updates were released in Patch #7.4.18.8 on January 30, 2018.

## Tables (cont.)

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### Update Procedure Prices (*Procedure Code Table, Procedure Prices*)

A new **Prices to Update** field was added, so you now have the option to select if you want to update **Facility** or **Non Facility** prices.

Update Procedure Prices	
Begin with Procedure Code	<input type="text"/> <input type="button" value="Q"/>
End with Procedure Code	<input type="text"/> <input type="button" value="Q"/>
Copy from Price Effective Date	<input type="text" value="02-17-2018"/> <input type="text" value="02-17-2018"/> <input type="button" value="v"/> <input checked="" type="checkbox"/>
Copy to Price Effective Date	<input type="text" value="02-28-2018"/> <input type="button" value="calendar"/>
Prices to Update	<input type="radio"/> Facility <input checked="" type="radio"/> Non Facility
Update Dr Rate Schedule	<input type="text"/> <input type="button" value="v"/>
Percentage to Update Prices	<input type="text"/> <input checked="" type="checkbox"/>
Rounding	<input checked="" type="radio"/> Up to Nearest Dollar <input type="radio"/> Up to Nearest Cent

## Transactions

### ERA Exception Report (*Electronic Remittance Advice (ERA), Import and Post ERA Files*)

The report heading section has been enhanced to include the following data for each ERA file.

- Payer Name
- File Date
- Check Date
- Check #
- Check Amount



Feb 12, 2018	EASTSIDE MEDICAL	Page 1
Electronic Remittance Exception Report		
Filename:		
Payer: MEDICARE SERVICE CENTER		
File Date: 01-30-2018 Check Date: 01-07-2018 Check #: 887779855 Check Amt: \$ 116.46		
-----		
ID #	Patient Name	ERA Service Procedure Billed Allowed Exception Reason Line Date Code Amount Amount
-----		

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

To prevent the submission of partial claims to secondary insurance carriers, an enhancement has been made to allow you to control the posting of \$0.00 payments when the allowed amount is also \$0.00 (when the charges are denied as patient’s responsibility) and no longer receive the exception **Allowed amount equals zero**. If you select the **Auto Post \$0 Payment (ERA)** check box for each code in the *Insurance Denial Code* table that is for a Patient Responsibility denial, those payments will only show up on the Exception report as a “W”arning and indicate **Did not pay or allow for this item. A \$0.00 payment has been posted**.

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

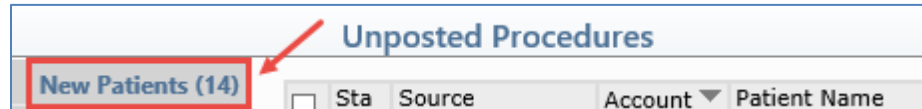
A new **Amt Posted** column has been added to provide the total amount of payments *automatically* posted when the file is imported and posted, so you can quickly determine if the entire check was posted or if some payments were placed on the *Payment Exception Report* and need attention. The **Amt Posted** column will only populate amounts for files imported after 7.4.19 has been installed.

Import and Post ERA Files											System Manager EASTSIDE MEDICAL (1)
EOB	Exc	Source	File Name	File Date ▲	Amount	Amt Posted	Check #	Check Date	Payer Name	Status	
<input type="checkbox"/>		C:\REMITTS\	J12795_MEDprim_NoPay_ded_4.txt	02-01-2018	116.46	116.46	300070276	01-25-2018	MEDICARE SERVICE CENTER	02/01/2018 04:43:09PM by DMR	
<input type="checkbox"/>		C:\REMITTS\	J12795_MEDprim_NoPay_ded_3.txt	02-01-2018	363.43	363.43	300070276	01-25-2018	MEDICARE SERVICE CENTER	02/01/2018 04:40:30PM by DMR	

## Transactions (cont.)

### Unposted Procedures

The **New Patients** Action Column button has been enhanced to provide a visual notification when there are new patients with unposted procedures waiting to be registered and processed. The text will display in bold font and provide a count of the patients to alert you.



### Transaction Journals to Excel

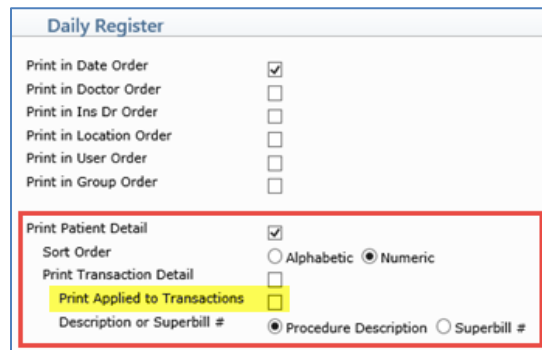
When the Payment option is selected, a new **User of Paid Transaction** column has been added, which will print the User Code of the staff member that originally posted the procedure the payment was applied towards. In addition, the headings for the **Code of Paid Transaction** and **Actual Date Posted** columns has been changed to **Procedure Code of Paid Transaction** and **Actual Date Transaction Posted** to provide more precise descriptions.

### Procedure Entry

Corrections have been made so that when you press the TAB key to navigate through the Diagnosis and Referring Doctor fields in the upper portion of the screen, you will now proceed to the next field properly.

### Daily Register (*Transaction Journals*)

Enhancements have been made to the screen to better reflect how the sorting options are dependent upon selecting patient and transaction detail and a new **Print Applied to Transactions** field has been added. In the 7.4.18 update, the report was enhanced to automatically print the individual transactions that every payment and adjustment was allocated to and the amount allocated, if you selected to print the report with *Transaction Details*. Now, you have the option to select whether you want to include that level of detail using the **Print Applied to Transactions** check box.



Daily Register	
Print in Date Order	<input checked="" type="checkbox"/>
Print in Doctor Order	<input type="checkbox"/>
Print in Ins Dr Order	<input type="checkbox"/>
Print in Location Order	<input type="checkbox"/>
Print in User Order	<input type="checkbox"/>
Print in Group Order	<input type="checkbox"/>
Print Patient Detail	<input checked="" type="checkbox"/>
Sort Order	<input type="radio"/> Alphabetic <input checked="" type="radio"/> Numeric
Print Transaction Detail	<input type="checkbox"/>
Print Applied to Transactions	<input type="checkbox"/>
Description or Superbill #	<input checked="" type="radio"/> Procedure Description <input type="radio"/> Superbill #

## Transactions (cont.)

### Daily Register (Transaction Journals)

Formatting changes have been made to the report when you select the **Print Applied to Transactions** check box. The transaction detail and the amount allocated to each transaction will now print directly below the original transaction line.

Feb 23, 2018		Daily Register							Page 3		
From 02-02-2018 Through 02-05-2018											
Doctor - Dr. Timothy Hayburn, P.H.D.											
Acc/Date	Tran/Date	ID#	Patient/Guarantor	Code	Description	Dr	Loc	Charge	Adjustment	Payment	Balance
02-02-18	02-02-18	25841.1	Targaryen, Daenyryus	99213	OV EST LEV > 3	HAY/HAR	HAY	65.00			
				INS	W/O INSURANCE	HAY	HAY		<10.00>		
					Applied \$10.00 to DOS:02-02-18						
				99213	OFFICE/OUTPATI	HAY/HAR	HAY				
				INS	INSURANCE PMT	HAY	HAY			<15.00>	
					Applied \$15.00 to DOS:02-02-18						
				99213	OFFICE/OUTPATI	HAY/HAR	HAY				241.00
02-02-18	02-02-18	25895.1	Lannister, Tyrion	99215	OV EST LEV 5	HAY/HAR	HAY	201.00			
				INS	INSURANCE PMT	HAY	HAY			<100.00>	
					Applied \$100.00 to DOS:02-02-18						473.75
02-05-18	02-05-18	25768.1	WINCHESTER, DEAN	CA	CASH PMT	HAY	HAY			<10.00>	
					Applied \$10.00 to DOS:05-16-17						
				HAY100	STREP THROAT C	HAY/HAY	HAY			<10.00>	
				CA	CASH PMT	HAY	HAY				
					Applied \$10.00 to DOS:08-10-17						<4,602.99>
				HAY100	STREP THROAT C	HAY/HAY	HAY				
* Totals								.00	<10.00>	<135.00>	

**Note:** The 'Applied to' data will not print within the 'Unallocated' section or for payments or adjustments that do not have a Dr or Loc assigned to them.