What's New in

CGM webPRACTICE™ v7.4.22

Final Release Notes

February 12, 2019

CGMwebPRACTICE™

Fully Web-Based Practice Management Suite

Table of Contents

INTRODUCTION

This document provides an overview of new features, resolutions, and enhancements available in the release of CGM webPRACTICE v7.4.22. 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.7.4.22 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
15	Load the AMA CPT Codes	Load the updated files if applicable.
15	Import Fee Schedules	Load the updated files if applicable.
15	Load the HCPCS Codes	Load the updated files if applicable.
15	Import RVU Unit Values	Load the updated files if applicable.
14	Column Selectable Fields	*Patient Collections - Work Accounts -* Add the new columns if applicable.

Summary of Changes to Document

Version 1 of Preliminary Public Release Notes were released February 4, 2019.

Section	Function	Added/Deleted/Revised
Additional Release Notes	Billing Group field- *Multiple functions*	Added release note

Billing

EMEDIX™ Credentials ***New Functionality***
This new function allows any active EMEDIX user to change their EMEDIX website password.

> **Note**: When you enter and save a new password in this function, the *EMEDIX eResp Integration* function is automatically updated for your CGM webPRACTICE User Code.

Collections

Work Accounts (*Insurance Collections*)

When you point to a Practice or Insurance Denial Code in a row, the description for the code displays now.

Work Accounts *(Insurance Collections)*

New **Practice Denial** and **Insurance Denial** fields have been added to the Filter function.

Work Accounts *(Patient Collections)*

The following enhancements have been made:

- **Add/Edit Filter** and **Remove Filter** Action Column buttons have been added that allow you to filter the patient accounts listed on the Work Accounts screen. You can filter by Collection Status, Doctor Code, Location Code, Billing Group, Type of Accounts, and Balances Greater than $. When a filter is applied, the **Filter Applied** header will display in red font, along with details of the filter settings.
  - o The **Type of Accounts** option allows filtering by selecting *Worked*, *Unworked* or *All*. **Unworked** is selected by default.
  - o The **Balance Greater than $** option allows filtering by a balance.
- A check box has been added to the top of the check box column, which allows you to select all the patient accounts displayed on the screen.
- **Mark As Worked** and **Mark As Unworked** Action Column buttons have been added, so you can select patient accounts using the check boxes and change the Work status with a single click.

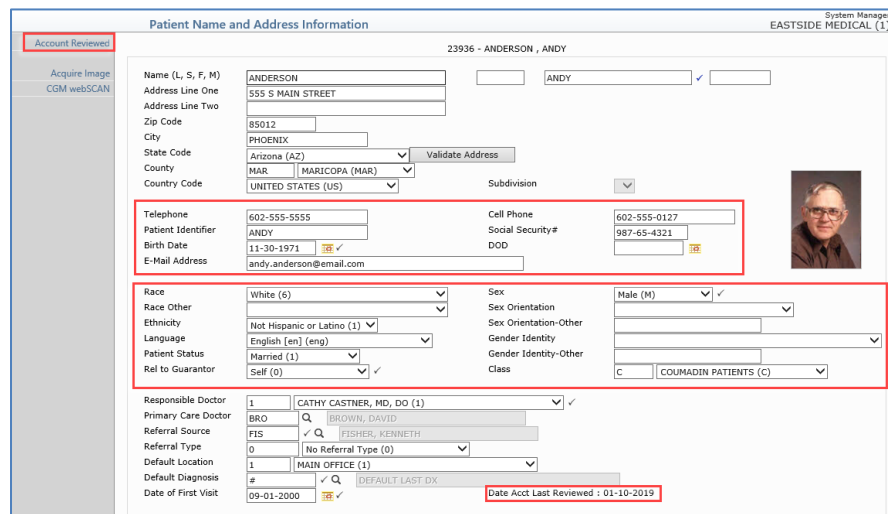**Third Party Turn Over Report** (*Patient Collections*)

Both the standard and Excel versions of this report have been updated to include employer information stored in the *Employer* screen. Any employer data stored on the *Billing Information* screen will print first, followed by data from the *Employer* screen, for every non-terminated employer.

Patient

Patient Registration and **Change Patient Data**

The following enhancements were made to the Patient Name and Address screen for UDS reporting and Meaningful Use:

- Numerous fields reorganized on the screen for a more efficient workflow
- **Other** field changed to **Race Other**
- New fields added for:
    - Sexual Orientation
    - Sexual Orientation-Other
    - Gender Identity
    - Gender Identity-Other
    - Date Acct Last Reviewed
- **Account Reviewed** Action Column button added. Since UDS reporting requires you to review fields annually and a Review Date be stored for auditing purposes, you can now click **Account Reviewed** to automatically update and store the **Date Acct Last Reviewed** for the patient account.

Upload Transcription Files *New Functionality*

This function allows CGM Hosted Clients to upload transcription documents directly from their workstations onto the CGM hosted servers and have them automatically linked to patient accounts. For detailed information, see the *Upload Transcription Files* function on the *Patient* menu in CGM webPRACTICE Help.

Patient Detail to Excel Reports (*Patient Listings*)

Patient Race Description and **Patient Ethnicity Description** data elements have been added.

Patient (cont.)

Change Patient Data - Patient Summary Screen

The insurance carrier's fax number displays now in the pop-up window when you hover over either the Primary or Secondary Insurance boxes.

Change Patient Data - Transaction History Detail

The **Reversal Reason** will now display in the ledger and on the *Transaction History Detail* screen in the **Alt. Desc.** field for any Payment or Adjustment transactions that were reversed. Previously, only the Reversal Reason for Procedures that were reversed would display.

Reports

Compile UDS Reports and **Print UDS Reports** (*UDS Reports*)

Enhancements released for the UDS Reports *6a Selected Diagnoses and Services Rendered* to meet the new Calendar Year 2018 reporting standards for Reporting Year 2019.

ICD-9 to ICD-10 Analyzer Crosswalk Reports (*Statistical Reports, Detailed Diagnosis Analysis*)

These reports have been removed from the system since they were provided to assist while transitioning from ICD-9 to ICD-10 codes and ICD-10 codes have been out for four years now.

Alphabetic Aged AR, Numeric Aged AR, Alphabetic Aged A/R by Patient Balance, and **Numeric Aged A/R by Patient Balance** (*Aged Accounts Receivable (A/R) Reports*)

The **Transaction Detail** field has been renamed **Include Transaction Details**. A new **Include $0.00 Balance Remaining Transactions** check box allows you to select if transactions that do not have a balance remaining due on them, should print or not. This only applies if you select the **Include Transaction Details** check box.

Sorted Productivity Analysis Reports (*Statistical Reports-Productivity Analysis Reports*)

The *Sorted Productivity Analysis by Billing Group* reports and the *Triple Sorted Productivity Analysis Reports* now have the option to print to *Microsoft Excel via MyReports*.

New Patient/Follow-Up Reports-All Sorting Options

The reports have been updated will the following changes:

- The *New Patient* reports have been corrected to find the first visit for the patient based on the actual earliest date of service posted. Previously, the first accounting date posted on the account was obtained and then the first date of service was captured for that specific accounting date, which would not necessarily be the actual *earliest* date of service posted (if it happened to be posted under a later accounting date).

- The **Print By**: **Posted Date of Service** or **Date of First Visit** options have been removed, since all of the reports now find the actual *earliest* date of service posted.

- The **Date** fields now clearly reflect which date the report will be sorted by.

- The *New Patient report by Location* report will now include patients that do not have a **Default Location** stored in the *Patient Name and Address* screen. Previously, the report omitted those patients.

Schedule

Enter Patient Appointments

The schedule views for **OneDoctor/One Day**, **One Doctor/Week-at-a-Glance** and **One Doctor/Month-at-a-Glance** now display the patient account number for registered patients. No changes were made to the compressed schedule views for **One Doctor/Week-at-a-Glance** and **One Doctor/Month-at-a-Glance,** since those screens are too small to accommodate the patient account number.

Enter Patient Appointments

A new **Expand All/Collapse All** toggle Action Column button has been added to the *Enter Patient Appointments*, *Inquiry*, and *Wait List* functions. Click to expand/collapse all of the time slots in the schedule without having to individually click the plus '+' or minus '-' icons next to every appointment.

When you click the **Expand All/Collapse All** Action Column button, the view settings are stored by your User Code as expanded (or collapsed), so the next time you access the function, the view will be automatically expanded (or collapsed). This expanded/collapsed setting is stored separately for the *Enter Patient Appointments*, *Inquiry* and *Wait List* functions.

Schedule (cont.)

Enter Patient Appointments
The address for the Location will now print in the *Future Appointments* section when you select the **Print** Action Column function.
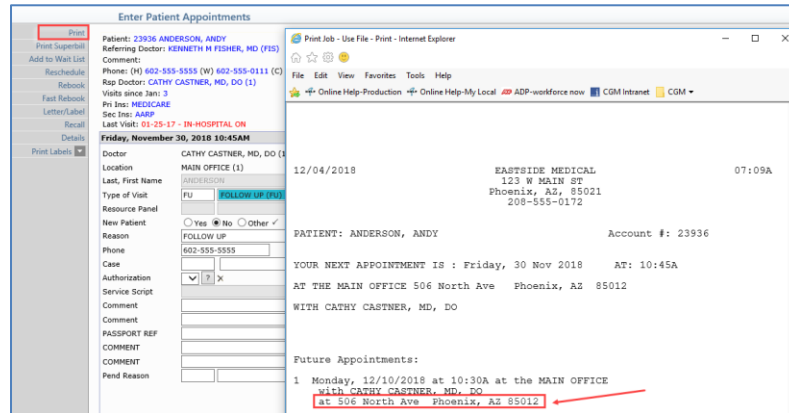
Print Chart List (*Scheduling Printing Menu*)
Pre-registered patients will now print on this report with "(R)" in front of their name.
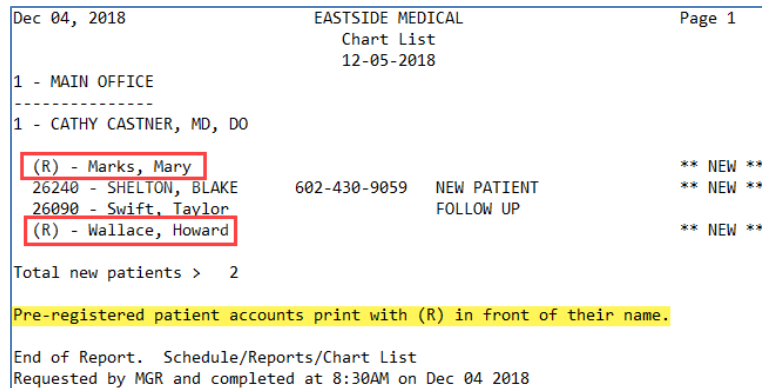
Patient Check In/Out
You can print a patient statement directly within this function using the new **Print Statement** Action Column button.

Maintain Doctor Integration Codes (*Scheduling Table Maintenance, Doctor Code Integration Table*)
A **Default Appoinment Unit** field has been added so you can set a default value for a specific Doctor Code. For additional information, see the *Edit Doctor Schedules* entry under the *Schedule* section of these release notes.

Schedule (cont.)

Edit Doctor Schedules (*Doctor Schedule Maintenance*)

When you build a new schedule using the **New Location** Action Column function:

- The **Appointment Unit** field will now populate any value stored in the **Default Appointment Unit** field from the *Maintain Doctor Integration Codes* function first, otherwise it will populate the value stored in the *Scheduling System Integration* function.
- The **Max Appt/Unit** field will now populate any value stored in the **Max Appts per Unit** field from the *Maintain Doctor Integration Codes* function first, otherwise it will populate the value stored in the *Scheduling System Integration* function.

For additional information, see the *Maintain Doctor Integration Codes* entry under the *Schedule* section of these release notes.

Edit Doctor Schedules (*Doctor Schedule Maintenance*)

A new **Note Color** field in the **Notes** Action Column function allows you to select a font color for displaying the Note text in the Schedule.
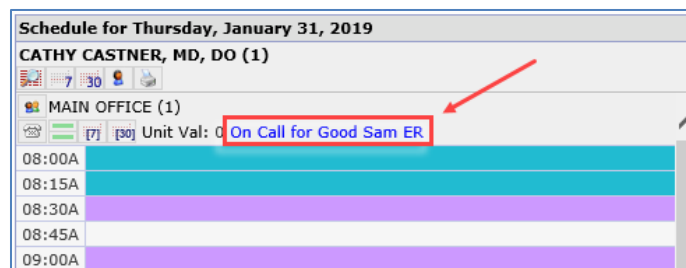
Maintain Templates (*Scheduling Table Maintenance, Template Maintenance*)

A new **Copy to Location** field in the **Copy** Action Column function allows you to copy a template from one location into a new location. You can copy the template to a new database or within the same database, as long as the Template ID is unique. The **Transfer to Database** field has been renamed **Copy to Database** and has been moved to a new lead-in screen.

Note: If you are copying a template that contains multiple location codes, you can only copy it into a new database for the existing location codes.

Schedule (cont.)

Scheduled Patient Detail to Excel Reports (*Schedule Printing Menu*)
Patient Race Description and **Patient Ethnicity Description** data elements have been added.

Scheduling Co-Pay Report (*Scheduling Printing Menu*)
Pt Bal Due, **Checked In by User**, **Checked Out by User**, and **ROA Collected** columns have been added. In addition, the **Expected Co-Pay** field was renamed **Co-Pay Expected** and the data columns were formatted to use a smaller font.

> **Note**: The **Pt Bal Due** amount represents the full patient balance due on the patient's account at the time the report is printed.

Data formatting issues were also resolved when a patient had multiple appointments on one date and any data for 'Blocked' appointment times will no longer print.

```
Jan 25, 2019                           EASTSIDE MEDICAL                                    Page 1
                                    Scheduling Co-Pay Report
                                        Sorted by Doctor
                                        For All Doctors
                                       For All Locations
                               From 01-25-2019 through 01-25-2019
                               Does not Include No-Show Appointments

                                     Co-Pay      Co-Pay     ROA       Pmt    Pt Bal   Checked In  Checked Out
Time    Loc  Patient Name   Acct #   Expected   Collected  Collected  Type   Due      by User     by User
---------------------------------------------------------------------------------------------------------
01-25-2019

12:15PM  1   Madison, James   26207     25.00      25.00                CA     63.50    MGR         MGR
                                                            10.00       CA

01:30PM  1   TAYLOR, KELLY    100027    10.00      10.00                CK    364.54    MGR

             Totals for Doctor 1:       35.00      35.00    110.00
```

System

Column Selectable Fields (*Database Maintenance Menu)* ***Action Required***
   The following fields have been added for the *Patient Collections - Work Accounts* function:

- Last Statement
- Last Personal Payment
- Last Visit
- Payment Plan
- Next Payment Date
- Next Contact
- Last Contact

Scheduling System Integration (*Database Maintenance Menu, Integrations, Schedule Integrations*)
   A new **Security for Overwriting Unit** field allows you to set a security level that only allows users with
   that security level or higher to overwrite the **Unit** field on a patient appointment.

Unposted Procedures Integration & Procedure Entry Integration (*Database Maintenance Menu, Integrations, Transactions Integrations*) ***New Functionality***
   A new *Unposted Procedures Integration* function contains the integration fields that were previously
   located in the *Procedure Entry Integration* function.

   In addition, a new **Check for Duplicate Transactions** check box in the *Unposted Procedures Integration*
   function allows you to select if you want to receive a warning message and prevent auto-posting in
   Unposted Procedures, when a charge matches the procedure code, date of service, and location of a
   previously posted charge.

Tables

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

Updates to the 2019 HCPCS data files, effective January 1, 2019 are available. To receive the updated codes you must load the 2019 file. These updates were released in Patch #7.4.21.16 on January 16, 2019.

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

The Centers for Medicare and Medicaid Services (CMS) have released the 2018 Medicare Physician Fee Schedule effective October 1, 2018. These updates were released in Patch # 7.4.21.10 on November 10, 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 Fee Schedules *(Fee Schedule Tables)* *****Action Required*****

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

- 2019 Medicare Physician Fee Schedule, effective January 1, 2019
- 2019 Medicare Clinical Laboratory Fee Schedule, effective January 1, 2019
- 2019 Medicare DME Fee Schedules; Prosthetics/Orthotics, and Supplies (DMEPOS) and Parenteral and Enteral Nutrition (DMEPEN), effective January 1, 2019

The updated files are available for import by selecting 2019 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 2018 Medicare Relative Value Unit files (RVUs) effective October 1, 2018. To receive the updated codes you must load the **2018** file.

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

The Centers for Medicare and Medicaid Services (CMS) have updated the 2019 Medicare Relative Value Unit files (RVUs) effective January 1, 2019. To receive the updated codes you must load the **2019** file.

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

Updates to the 2018 CPT codes, effective October 1, 2018 are available for clients. To receive the updated codes you must reload the 2018 file.

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

The 2019 CPT codes are available. To receive the codes you must load the 2019 file.

Tables (cont.)

Maintain Insurance Denial Codes (*Insurance Denial Code Table*)
The updated Claim Adjustment Reason Codes (CARC) and Remittance Advice Remark Codes (RARC), effective November 1, 2018 have been loaded into CGM webPRACTICE. These updates were released in Patch #7.4.21.13 on December 27, 2018.

Maintain Location Codes (*Location Code Table*)
A new **Tax ID Number** field has been added. This field is informational only and is not utilized by other functions.

Transactions

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

A new **Batch** column will display the Batch number entered for each ERA. A **Batch** column was also added to the **View Archives** Action Column function.
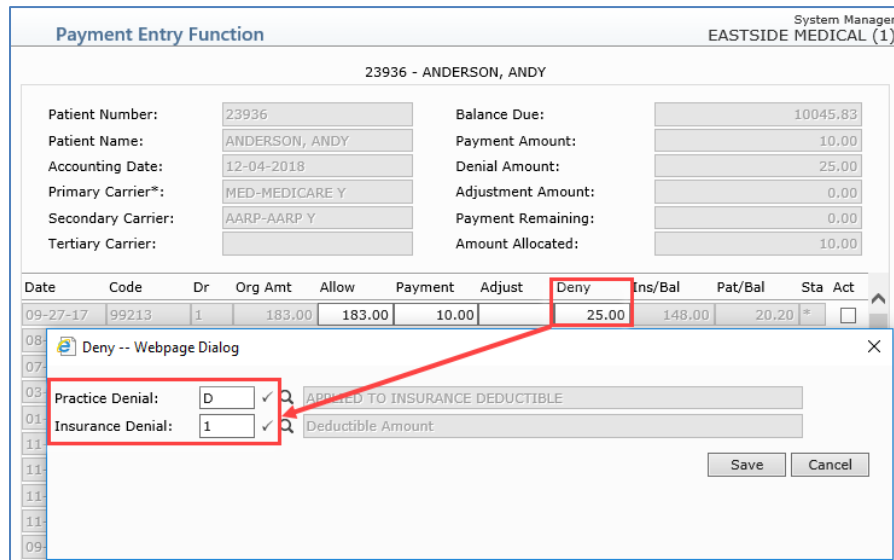
> **Note**: Batch numbers will only display for ERA's posted after the 7.4.22 update has been installed.

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

A new "Corrected MID" line will print on the EOB under the original policy number, when a corrected policy number is received in the ERA in NM1*74. In addition, the label for the original policy number now prints "MID" instead of "HIC".

Payment Entry Function

The **Practice Reason** and **Insurance Reason** fields for the **Deny** function have been renamed to **Practice Denial** and **Insurance Denial**. In addition, if the denial is for the Primary Carrier and there is an effective Secondary Carrier for the date of service, then the **Insurance Denial** filed will now be required.

> **Note**: These same changes are effective when you deny amounts from within the *Patient, Change Patient Data, History* and *Transactions, Edit an Encounter* functions.

Unposted Payments

When a filter is applied, the **Filter Applied** header will now display in red font, along with details of the filter settings. These changes provide consistency throughout the system.

Transactions (cont.)

Create a Batch (*Transaction Batch Control*)

In an effort to prevent you from posting transactions on an incorrect date, a new warning message will display if you type or select an **Accounting Date** that is prior to today's date, requiring you to confirm if you want to proceed or not.

Batch Control Integration (*Transaction Batch Control*)

A new **Provide Warning for Past Acct Dates** check box allows you to select if you want a warning message to display if you enter an Accounting Date prior to the current date when creating a new batch.

Transaction Detail to Excel Reports (*Transaction Journals*)

New data elements for **Primary Carrier Allowed Amount** and **Secondary Carrier Allowed Amount** have been added.

Unposted Procedures

If there are any Un-registered New Patients with charges waiting to be posted, a new header will display at the top of the screen in red font, to make it more easily recognizable there are accounts waiting to be processed. Example header: There are (#) Un-registered New Patients with (#) charges waiting to be posted.

Unposted Procedures and **Pre-Treatment**

When a filter is applied, the **Filter Applied** header will now display in red font, along with details of the filter settings. These changes provide consistency throughout the system.

CGM webTOOLS™

Automating Electronic Patient Statements ***New Functionality*** **CGM Electronic Patient Statements only**

New functionality is available that allows you to automate the process of generating and sending electronic patient statements on a monthly, weekly or daily basis at a specified time of the day. Statement Cycles provide control of the necessary customized settings specific to your practice to automate the process.

If you want to take advantage of automating your electronic statements, please contact your Account Manager to request activation. Our Implementation Department will then work closely with you to analyze any current statement customizations and ensure the automation process is set up appropriately, based on your practice's process for generating and sending electronic statements.

Manage Automated Statements (*Billing*) ***New Functionality*** **CGM Electronic Patient Statements only**

This new function allows you to create, view, and edit electronic statement cycles to automatically generate and send statements. Upon accessing this function, a list of any previously stored cycles will display including the Cycle name, Billing Group, Alpha/Numeric, From Pt, Through Pt, Min Balance, Frequency, Effective Date, Next Send Date, and Enabled.

	Cycle Name	Billing Group	Alpha/Numeric	From Pt	Through Pt	Min Balance	Frequency	Effective Date	Next Send Date	Enabled
Add Cycle	BG Test	UHC	Numeric			5.00	Daily	11-20-2018	01-30-2019	Yes
History	QA Monthly	AET	Alpha			5.00	Monthly	11-20-2018	02-22-2019	Yes
Integration Settings	QA Test Cycle	BC	Numeric			5.00	Daily	11-07-2018	01-30-2019	Yes
	QA Weekly	All	Alpha	A	LZZZ	5.00	Weekly	11-20-2018	02-05-2019	Yes

Add Cycle

To add a new statement cycle, click the **Add Cycle** Action Column button. To edit or delete an existing statement cycle, click anywhere on the row for the cycle. After selecting an existing statement cycle, you can click **Run Now** to generate and send the statements immediately, if needed.

Note: You will not be able to access this function until our Implementation Department has activated it.

History

You can access the **History** screen for the *Send Electronic Statements* function directly from within this function, using the **History** Action Column button, where you can view all historical electronic statement files for the database.

Integration Settings

You can access the *Electronic Pt Stmts Automation Integration* function directly from within this function, in case you want to change the time of the day to send the automated statement files.

CGM webTOOLS (cont.)

Electronic Pt Stmts Automation Integration *(System, Database Maintenance Menu, Integrations)*
New Functionality - **CGM Electronic Patient Statements only****

This new function allows you to specify what time of the day you want to send the automated statement files.

Additional Release Notes

Billing Group Field

The **Billing Group** field has been expanded up to eight characters in the following functions.

- **Billing Information** and **Case Management** *(Patient, Change Patient Data)*
- **Procedure Entry Function** *(Transactions)*
- **Maintain Billing Groups** *(Tables, Billing Group Table)*
- **Maintain Case Codes** *(Tables, Case Management Table)*
- **Enter Patient Appointments - Quick Register** *(Schedule)*
- **Print Patient Statements, Print History Statements** *(Billing)*
- **Create Insurance File** *(Billing, Insurance Billing Functions)*