What's New in

CGM webPRACTICE™ v7.4.23

Final Release Notes

May 14, 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 v7.4.23. 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.7.4.23 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
13	Import Fee Schedules	Load the updated files if applicable.
13	Load the HCPCS Codes	Load the updated files if applicable.
13	Import RVU Unit Values	Load the updated files if applicable.

Summary of Changes to Document

Version 1 of Preliminary Public Release Notes released May 7, 2019.

Section	Function	Added/Deleted/Revised
Patient	*Change Patient Data > Insurance Policy Information > Eligibility History Verify Eligibility by DMS List > Eligibility Status by DMS List*	Deleted
Schedule	*Verify Eligibility > Eligibility Status & Patient Check In/Out > Eligibility History*	Deleted
User Desktop Functions	*Practice Vitals Dashboard*	Revised
Patient	*Patient > Patient Registration Patient > Patient Registration > Patient Look-Up*	Revised
Patient	*Patient > Patient Listings > Print All Data for Active Patients*	Revised
Patient	*Patients > Patient Listings > Sorted Lists of Patients > Lists of Patients by Case*	Revised
System	*System > Database Maintenance Menu > Integrations > Collections Integration > Patient Collections Integration*	Revised
System	*System > Database Maintenance Menu > CGM webPRACTICE Default Values*	Revised
System	*System > Database Maintenance Menu > Integrations > Collections Integration > Insurance Collections Integration*	Revised

CGM webPRACTICE Enhancements

Billing Group fields

In v7.4.22 the **Billing Group** field was expanded to eight characters in a few functions and now every remaining **Billing Group** field throughout the system has also been expanded.

User Desktop Functions

Practice Vitals Dashboard

New options available for:

- **Un-Registered New Pts**: Displays the number of un-registered patients that exist from inbound demographic interfaces.
- **Unposted Procedures for Un-Registered New Pts**: Displays the number of unposted procedures for un-registered patients from inbound demographic interfaces.
- **Unposted Procedures for Registered Pts**: Displays the number of unposted procedures for registered patients.
- **Unposted Pre-Treatment Procedures**: Displays the number of unposted procedures entered in *Pre-Treatment*.

Collections

Third Party Turn Over Report and **Review for Turn Over Report** *(Collections > Patient Collections > Turn Over Functions > Third Party Turn Over Report)*

A new **Include Employer Information** check box allows you to select whether or not you want the employer information included in the reports. If you select the check box, only the information for the first three non-terminated employers will be included. The **Print Detail of Patients** check box was moved to the top of the screen to make it easier to see that the indented fields below it only apply if you select the **Print Detail of Patients** check box.

In addition, the data for the Excel version of the reports now prints in individual columns to allow you to perform additional sorting within Excel. DMS Notes have also been added to the columns and the first 10 DMS Notes on the patient's account starting from the date entered will be included on the report.

Managed Care

Maintain Cue Cards *(Managed Care Menu > Cue Card Management Functions > Maintain Cue Cards)*

If you accessed a Cue Card that had any special formatting in place for the content, the formatting would be lost and you would have to re-format the content. This has been resolved.

Patient

Patient Registration and Change Patient Data

Insurance Information *(Patient > Patient Registration > Insurance Information)*

Enhancements were made so that when you add or edit an insurance policy:

- If 'Self' is selected for the **Pat.Rel. to Policy Holder** field, the policy holder's name, birth date and sex are now automatically updated from the Patient Name and Address screen.
- If 'Child' is selected for the **Pat.Rel. to Policy Holder** field, the Policy Holder's name, Birth Date are now automatically updated from the Guarantor's information. The Policy Holder's Sex field is cleared out since the Guarantor's Sex is not stored in the system.

Guarantor Image *(Patient > Change Patient Data > Guarantor)* **- ***Family Billing and Linking Databases only*****

The following enhancements have been made:

- Anytime an image for the Guarantor is stored for a master account, the image will automatically display for the Guarantor on any linked/slave accounts
- Anytime you update the Guarantor Image via the master account or linked/slave account, the most recent image will be shared by all accounts linked to the master account
- If an image for the Patient exists on the master account, but no image exists for the Guarantor, the Patient Image is copied over to the Guarantor (for the master account only).
- When you access the Guarantor Image via the master account or linked/slave account, a comparison is done to see which account has the most recent Guarantor image and the old image on the applicable account will be replaced with the most recent image.

Patient (cont.)

Patient Registration *(Patient > Patient Registration)* ***Patient Billing Systems only***
A **New Patients** Action Column button will display how many unregistered patients currently exist in the database. Unregistered patients are the patient accounts received via inbound interfaces that do not currently exist in the database. Previously, you could only access a list of unregistered patients via *Unposted Procedures* on the *Transactions* menu. When you click the **New Patients** Action Column button, a list of the unregistered patients will display allowing you to select one. Then you will have the option to update and register the patient account or delete it.

Patient Look-Up *(Patient > Patient Registration > Patient Look-Up)* ***Patient Billing Systems only***
This function has been enhanced to display any Unregistered Patient accounts in addition to pre-registered patient accounts. When you search for a patient account, a '(U)" will display before the patient's number if it is an unregistered patient.

Sorted Lists of Patients *(Patients > Patient Listings > Sorted Lists of Patients)*
A few of the reports were missing the option to print to *Microsoft Excel via MyReports.* This has been resolved.

Lists of Patients by Case *(Patients > Patient Listings > Sorted Lists of Patients > Lists of Patients by Case)*
A **Case Employer** column has been added to this report when you select the **Print Detail of Patients** check box and print the report to *Microsoft Excel via MyReports*.

Print All Data for Active Patients *(Patient > Patient Listings > Print All Data for Active Patients)*
Any **Department** associated with a charge will now print when you select *Patient Transaction History* or *Print all Data* for the **Print Information** field and then select *Print Transaction Detail*.

```
Accounting Date  >  12-12-2018          Service Date > 12-12-2018
  Procedure Code   >  99214 - OV EST LEV 4                          Diag > W21.00XA - Struck by hit or thrown ball, unspec
  Procedure Amount >  100.00
  Doctor           >  1 - CATHY CASTNER, MD, DO
  Location         >  1 - MAIN OFFICE
  Referring Dr     >  FIS - FISHER, KENNETH
  Department       >  MEDICAL

  Refile Date      >  01-17-2019 - sent more info          Ins > *              Assignment > Y
  Alt. Desc.       >                                       Tkt #   >

  Actg Date Ser Date    Code         Description      Dr   Loc  Diagnosis          Amount      Applied    I
  ---- ---- --- ----    ----         -----------      --   ---  ---------          ------      -------    ---
  12-12-2018 12-12-2018 CCA          COPAY CASH                                    <15.00>     <15.00>
```

Eligibility Status by DMS List *(Patient > Verify Eligibility by DMS List > Eligibility Status by DMS List)*
CGM webVERIFY™ Clients Only
The **Print** Action Column button now provides the option to print to *Microsoft Excel via MyReports*.

Reports

Denial Reports *(Reports > Insurance Related Reports > Denial Reports)*
New columns for **Last Activity Date**, **Last Activity Carrier**, and **Last Activity Description** have been added to all of the report sorting options.

Statistical Denial Reports *(Reports > Insurance Related Reports > Insurance Statistical Reports > Statistical Denial Reports)*
New columns for **Last Activity Date**, **Last Activity Carrier**, and **Last Activity Description** have been added to all of the report sorting options.

Comparative Payment Analysis Reports
(Reports > Statistical Reports > Payment Analysis Reports > Comparative Payment Analysis Reports)
Comparative Adjustment Analysis Reports
(*Reports > Statistical Reports > Adjustment Analysis Reports > Comparative Adjustment Analysis Reports)*
Comparative Productivity Analysis Reports
(Reports > Statistical Reports > Productivity Analysis Reports > Comparative Productivity Analysis Reports)
The Excel versions of these reports have been enhanced to print up to two decimal places when applicable.

Schedule

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

Enhancements made to the *Patient Check In/Out* screen to provide better consistency whether you access it from within *Enter Patient Appointments* or directly from the *Scheduling* menu. The following highlighted fields have been added:

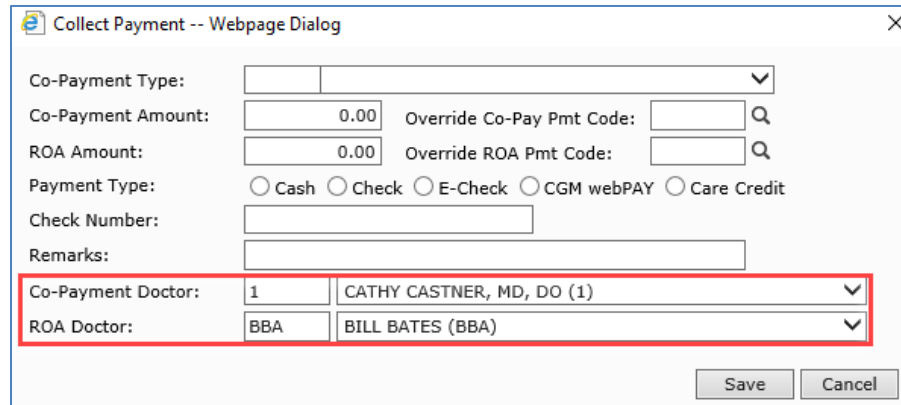Accessed from the *Scheduling* menu and clicking **Select Patient** in the Action Column:

Accessed within *Enter Patient Appointments* after selecting a patient appointment*:*

New **Co-Payment Doctor** and **ROA Doctor** fields have been added to the Collect Payment screen allowing you to assign a doctor to a payment. The **Co-Payment Doctor** field will default to the appointment doctor if the payment is associated with an appointment, otherwise the patient's **Responsible Doctor** will default. The **ROA Doctor** field will default to the patient's **Responsible Doctor**. For additional information, see the *Check In/Out Payment Journal* entry in this section of these release notes and the *Unposted Payments* entry in the *Transactions* section.

Schedule (cont.)

Check In/Out Payment Journal *(Schedule > Scheduling Printing Menu > Check In/Out Payment Journal)*
A new **Print in Dr Assigned to Pmt Order** option has been added. Selecting this option will print the report sorted by the doctors assigned to the payments. In addition, two new *Resp Dr* and *Dr Assigned to Pmt* columns have been added when you print the report to Excel. For additional information, see the *Patient Check In/Out* entry in this section of these release notes and the *Unposted Payments* entry in the *Transactions* section.

Maintain Status/Locations *(Schedule > Scheduling Table Maintenance > Patient Status/Location Table > Maintain Status/Locations)*
The **Check In/Out Status Code** check box field has been enhanced to allow differentiating between **in-office** Status codes (*checked-in, in exam room, checked-out*) and **other** status codes (*confirmed, cancelled, etc.)* and provide better tracking of the use of **in-office** Status codes. I**n-office** codes are any Status codes that have the **Check In/Out Status Code** check box selected. You can use any of the **other** codes for an appointment up until the time you change the Status to an **in-office** Status code in *Patient Check In/Out*. As soon as you use an in-office Status code for an appointment, you will not be able to use any of the **other** Status codes until the patient has been Checked Out (defined in the *Patient Check In/Out Integration* function).

Eligibility Status *(Schedule > Verify Eligibility > Eligibility Status)* ***CGM webVERIFY Clients Only***
The **Print** Action Column button now provides the option to print to *Microsoft Excel via MyReports*.

System

CGM webPRACTICE Default Values *(System > Database Maintenance Menu > CGM webPRACTICE Default Values)*

Added new default options for the **Insurance Effective Date** field when adding insurance policies to patient accounts. You can select to default the **Current System Date**, the patient's **Date of First Visit** or select **None** so no date will default, which will require the date to be manually entered.

> **Notes**:
> - If **Date of First Visit** or **None** is selected; when you enter a new patient appointment in **Scheduling** and the *Scheduling System Integration* is set to **Register**, all new insurance policies will store the **Current System Date** for the **Insurance Effective Date.**
> - Prior to the 7.4.23 update, if you did not have a date stored for the **Insurance Effective Date** field, the **Date of First Visit** would automatically default for the **Insurance Effective Date** when you added new policies. To ensure your current settings do not change after the v7.4.23 update is installed, the **Date of First Visit** option will be selected if the **Insurance Effective Date** field is currently blank in your system.

Patient Collections Integration *(System > Database Maintenance Menu > Integrations > Collections Integration > Patient Collections Integration)*

A new **Default # of Days for Next Contact** field has been added, so that if users fail to enter a **Next Contact Date** while working the patient's account, one can be automatically stored. Previously, if a user added a Note and failed to enter a **Next Contact Date**, the account would be marked as 'worked' and no longer show up in the Work Accounts list.

> **Note**: When you enter a number of days in the **Default # of Days for Next Contact** field, the applicable date will display in the **Next Contact Date** field, but it will not be stored until you click **Save** after adding the Note.

Insurance Collections Integration *(System > Database Maintenance Menu > Integrations > Collections Integration > Insurance Collections Integration)*

A new **Add Follow-Up Date, Carrier and Reason to INOTES** check box allows you to select if you want an INOTE to be automatically created when a **Follow-Up Date** is entered for a transaction in *Work Accounts*. The INOTE will be stored for the **Date of Service** of the transaction.

Tables

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 2019 Medicare Relative Value Unit files (RVUs) effective April 1, 2019. To receive the updated codes you must load the **2019** file.

Maintain Insurance Denial Codes (*Tables > Insurance Denial Code Table > Maintain Insurance Denial Codes*)

   The updated Claim Adjustment Reason Codes (CARC) and Remittance Advice Remark Codes (RARC), effective March 1, 2019 have been loaded into CGM webPRACTICE.

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

   Updates to the 2019 HCPCS data files, effective April 1, 2019 are available for clients who have purchased that code set. To receive the updated codes you must reload the 2019 file.

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

   The Centers for Medicare and Medicaid Services (CMS) have released the 2019 Medicare Physician Fee Schedule effective April 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.

Transactions

Unposted Payments *(Transactions > Unposted Payments)*

If an unposted payment has a doctor assigned to it and you auto-post the payment, the payment will be applied to procedures that match the payment doctor. If an Unposted Payment has a doctor assigned to it and you manually post it, a warning message will display at the top of the payment allocation screen indicating which doctor was assigned to the payment when it was stored, allowing you to apply the payment to correct charges associated with that doctor. For additional information, see the *Patient Check In/Out* entry and the *Check In/Out Payment Journal* entry in the *Schedule* section of these release notes.

Pre-Treatment *(Transactions > Pre-Treatment)*

New **Co-Payment Doctor** and **ROA Doctor** fields have been added to the Collect Payment screen allowing you to assign a doctor to a payment. The **Co-Payment Doctor** field will default to the appointment doctor if the payment is associated with an appointment, otherwise the patient's **Responsible Doctor** will default. The **ROA Doctor** field will default to the patient's **Responsible Doctor**.