What's New in

CGM webPRACTICE™ v7.4.28

Final Release Notes

August 12, 2020

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 v7.4.28. 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.7.4.28 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
11	Import Fee Schedules	Load the updated files if applicable
11	Load the HCPCS Codes	Load the updated files if applicable
11	Import RVU Unit Values	Load the updated files if applicable

Summary of Changes to Document

Version 1 of Preliminary Release Notes to be released August 4, 2020.

Section	Function	Added/Deleted/Revised
System	Column Selectable Fields	Revised
Transactions	Unposted Payments	Revised Filter section

Billing

Print Patient Statements *(Billing > Print Patient Statements)* and **Send Electronic Statements** *(Billing > (Send Electronic Statements)*

The menu function names have been changed so they reflect the functionality more clearly.

> ● Generate/Print Patient Statements
> ● Review/Send Electronic Statements

Patient

Change Patient Data

Insurance Policy Information - Verify Eligibility *(Patient > Change Patient Data > Insurance Policy Information)*

CGM webVERIFY™ Clients Only

When you click the **Verify Eligibility** Action Column button and the **Ask Date of Service to Verify** check box is selected in the *CGM webVERIFY Integrations* function, if you entered a future date of service the system will now check the insurance carrier code to see if the **Allows Verification of Future Dates** field has been selected or not. For additional information, see the *Maintain Insurance Carriers* entry under the *Tables* section of these release notes.
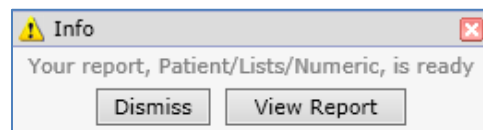
Reports

Alphabetic List of Patients, Numeric List of Patients and **Patient Detail to Excel** (Reports > *Patient Listings*)
The **Patients with Activity Since** field has been removed and new **Print from Service Date** and **Print through Service Date** fields have been added, so you can select a range of dates when printing this report. If charges posted on patient accounts falls within the range, they will print on the report. The **Print from Service Date** field will automatically default to one year prior to the currect day.

MyReports *(Reports > MyReports)*
When you print to *MyReports* and select the *Notify me when report is complete* option, the notification window now contains a **View Report** and **Dismiss** button.

This allows you to view the report without having to navigate to the *MyReports* function or you can dismiss the notification without viewing the report. You can still view the report in *MyReports* later, whether you use the **Dismiss** or **View Report** button. The **View Report** button is available for the following printer selections: *My Reports, Microsoft Word via MyReports, Microsoft Excel via MyReports* and *Print to PDF via MyReports.*

Schedule

Check In/Out Payment Journal *(Schedule > Scheduling Printing Menu > Check In/Out Payment Journal)*
The following enhancements were made so the data would display more clearly and provide more detailed information to make it easier to balance transactions:

```
Jul 10, 2020                               EASTSIDE MEDICAL                              Page 1
                                    Check In/Out Payment Journal
                             Sorted by Date and Totaled by Payment Method   ①
                                   From 07-07-2020 Through 07-07-2020

Acct    Patient Name        Date    ②  Pmt   Pmt      Pmt   User  Loc   Date        Check#     Amount    Different
                                       Type  Method   Code  Code  Code  Posted                           Amt Posted
-----------------------------------------------------------------------------------------------------------------
25997   Taylor, Zachary     07-07-2020   COP   WP-Device  CDISC  MGR   1                           25.00
25997   Taylor, Zachary     07-07-2020   ROA   WP-Device  DISC   MGR   1     07-07-2020            50.00
26115   SHAW, LARA          07-07-2020   COP   WP         CVISA  MGR   1                           30.00
26361   JOHNSON, SYLVIA     07-07-2020   ROA   WP-Device  MAST   MGR   1     07-07-2020            40.00
25477   TAYLOR, AMANDA      07-07-2020   COP   WP         CMC    MGR   1                           45.00
26388   Smith, Drake        07-07-2020   ROA   CA         CA     MGR   1     07-07-2020            35.00
25200   WARNER, KATHLEEN C  07-07-2020   COP   WP-Device  CAMEX  MGR   1                           20.00
25890   THOMPSON, MARK      07-07-2020   COP   WP         CDISC  MGR   1                           40.00
                                    ③
                                               Totals For Date - (07-07-2020) CA                     35.00*
                                               Totals For Date - (07-07-2020) WP                    115.00*
                                               Totals For Date - (07-07-2020) WP-Device Shawn's Office  135.00*
                                               Grand Totals For Date - (07-07-2020)        ④        285.00**
                                               Total # Patients:              7

                                               Grand Total for all Dates (CA)                        35.00*
                                                             Dates (WP)                             115.00*
                                                             Dates (WP-Device Shawn's Office)       135.00*
                                                                                                   285.00**

                                               Grand Total # Patients:        7

End of Report.  Transactions/Journals/Check In Out Payment Journal
Requested by MGR and completed at 1:56PM on Jul 10 2020
```

1. The report heading will now display 'Sorted by' *<<sort option>>* and 'Totaled by' *<<totals option selected>>.* Previously, it only displayed 'Sorted By'.
2. The **Pmt Type** column will now display only COP or ROA.
3. A new **Pmt Method** column will display the payment method: CA, CK, CC, EC, WP, etc. If the payment is collected with a CGM webPAY™ payment device, **WP - Device** will display.
4. If you select **Pmt Method** for **Print Totals by,** any payments that were collected by payment devices will be broken down by payment device name in the subtotals section, in addition to printing totals for the **WP** non-payment device payments.

A **Print Totals by** option was added so you can select **Pmt Method** or **Pmt Type/Pmt Method**.

Check In/Out Payment Journal

Print in Date Order	☑
Print in Patient Order	☐
Print in Payment Code Order	☐
Print in User Code Order	☐
Print in Location Code Order	☐
Print in Resp Doctor Order	☐
Print in Dr Assigned to Pmt Order	☐
Print Totals by	◉ Pmt Method ○ Pmt Type/Pmt Method
Summary Only	☐
Print From Date	07-10-2020
Print Through Date	07-10-2020

Schedule (cont.)

The **Pmt Method** will display the totals as they printed prior to the 7.4.27 update. The **Pmt Type/Pmt Method** will print the totals as they did after the 7.4.27 update.

```
                     Print Totals by Pmt Method

Totals For Date - (07-07-2020) CA                            35.00*
Totals For Date - (07-07-2020) WP                           115.00*
Totals For Date - (07-07-2020) WP-Device Shawn's Office     135.00*
Grand Totals For Date - (07-07-2020)                        285.00**
Total # Patients:              7

Grand Total for all Dates (CA)                               35.00*
                   Dates (WP)                               115.00*
                   Dates (WP-Device Shawn's Office)         135.00*
                                                            285.00**

Grand Total # Patients:          7
```

```
                 Print Totals by Pmt Type/Pmt Method

Totals For Date - (07-07-2020) COP WP                          115.00*
Totals For Date - (07-07-2020) COP WP-Device Shawn's Office     45.00*
Totals For Date - (07-07-2020) ROA CA                           35.00*
Totals For Date - (07-07-2020) ROA WP-Device Shawn's Office     90.00*
Grand Totals For Date - (07-07-2020)                           285.00**
Total # Patients:              7

Grand Total for all Dates (COP WP)                             115.00*
                   Dates (COP WP-Device Shawn's Office)         45.00*
                   Dates (ROA CA)                               35.00*
                   Dates (ROA WP-Device Shawn's Office)         90.00*
                                                               285.00**

Grand Total # Patients:          7
```

System

Column Selectable Fields (*System > Database Maintenance Menu > Column Selectable Fields*)
CGM webVERIFY Clients only

The *Eligibility Status* (*Schedule > Verify Eligibility > Eligibility Status*) and *Eligibility Status by DMS List* (*Patient > Verify Eligibility by DMS List > Eligibility Status by DMS List*) functions are now column selectable, so you can customize which columns you want to display and in what order to display them.

CGM ECOLLECTIONS™ Integration *(System > Database Maintenance Menu > Integrations > CGM ECOLLECTIONS Integration)* *****New Functionality*****

Created this new function so you have access to edit any of the required information for CGM ECOLLECTIONS Letters and no longer have to contact Customer Support for assistance.

System (cont.)

Image Management Integration *(System > Database Maintenance Menu > Integrations > Image Management Integration)*

Added a **Security Level to View** field, so you can specify the minimum security level a User must have to view any patient images throughout the system.

Maintain Work Queue *(System > Maintain Work Queue)*

The Work Queue functionality is now available to all clients. It is designed for managers to create work queues for employees to allow them to focus only on the codes assigned to their User Code, while working in specific functions in the system. You can define specific Table Codes that each employee is responsible for working within the following functions:

- o Unposted Procedures and Pre-Treatment
- o Unposted Payments
- o Insurance Collections-Work Accounts
- o Patient Collections-Work Accounts

Detailed instructions are available in *CGM webPRACTICE Help* under *System > Maintain Work Queue.*

Tables

Load the HCPCS Codes *(Tables > Procedure Code Table > Load the HCPCS Codes)* ****Action Required****
Updates to the 2020 HCPCS data files, effective July 1, 2020 are available for loading. To receive the updated codes you must load the 2020 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 2020 Medicare Relative Value Unit files (RVUs) effective July 1, 2020. To receive the updated codes you must load the **2020** file.

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:

- 2020 Medicare Physician Fee Schedule, effective July 1, 2020
- 2020 Medicare Clinical Laboratory Fee Schedule, effective July 1, 2020
- 2020 Medicare DME Fee Schedules; Prosthetics/Orthotics and Supplies (DMEPOS), effective July 1, 2020

The updated files are available for import by selecting 2020 in the **Fee Schedule Year** list and the applicable file name in the **Fee Schedule File** list.

Maintain Insurance Carriers *(Tables > Insurance Carrier Table > Maintain Insurance Carriers)*
CGM webVERIFY Clients Only
Added a new **Allows Verification of Future Dates** field, so that you can indicate on a per carrier basis if the insurance carrier allows eligibility verification for future dates of service. During the installation of the 7.4.28 update, a system pass-through will run to select this check box for any carriers known as accepting eligibility requests for future dates of service. For additional information, see the *Insurance Policy Information - Verify Eligibility* entry under the *Patient* section of these release notes.

> **Note**: When this check box is not selected, eligibility for future dates of service will not be checked and the system will then check the *CGM webVERIFY Integrations* **How to Handle Non Future Carriers** field to determine if it should check eligibility but use a **Current** date or **Skip** (not check eligibility).

Transactions

Unposted Payments *(Transactions > Unposted Payments)*

The following enhancements were made so the data would display more clearly and provide more detailed information for CGM webPAY payments:

- **Print to Excel** Action Column button added. This will print the unposted payments listed on the screen to Excel with the same sort and filter applied as the screen. There are a few differences between the screen and what is exported to Excel:
  - The check box column is not included
  - The icons in the status column are converted to Red, Yellow, Green
  - The error messages that display under the Patient name are not included
  - The CGM webPAY credit links and receipt icons in the Amount column are not included
- **Payment** column heading renamed to **Payment Type** (possible values: ROA, Co-Payment)
- **Pmt Method** column added - possible values:
  - **CA** (Cash)
  - **CK** (Check)
  - **CC** (Credit Card)
  - **EC** (E-Check)
  - **OP** (Other Payment Type)
  - **WP** (webPAY- non device)
  - **WP - Device** (webPAY - Device) *******new method added*******
  - **PP** (Payment Portal)
- **Payment Type** column renamed to **Payment Code**
  CGM webPAY will no longer print in front of the payment code (**Pmt Method** column now indicates CGM webPAY payments.
- "(C)" will no longer print after CGM webPAY payment amounts that have been collected. This only applied to the previous version of CGM webPAY.
- **Doctor** column renamed to **Pmt Dr**. This is the doctor assigned to the payment.
- Shortened the **Patient Name** column. Any error messages that display below the patient name will now wrap. This was done so more columns can display on the screen without the need for scrolling to the right.
- *CGM eMEDIX Payment Portal™* will no longer print in the **Remarks** column, since it already prints in the **Source** column.
- New **WP-Pmt Device** column added, which will list the payment device name for any CGM webPAY payment collected on a device

Transactions (cont.)

> **Note**: The new and renamed columns have also been updated in the *Column Selectable Fields* function (*System > Database Maintenance Menu > Column Selectable Fields*).

The following changes were made to the **Filter** Action Column function:

- **Payment** field renamed to **Payment Type**
- New **Payment Method** field added
- **Payment Type** field renamed to **Payment Code**
- New **WP-Pmt Device** field added

Daily Register to Excel (*Transactions > Transaction Journals > Daily Register to Excel*)

Added a **CGM webPAY** column to provide detailed information for CGM webPAY payments. The CGM webPAY Payment Method (**WP** or **WP-Device**) and the payment device name will display. Corrected the **Acct Date**, **Trans Date** and **Acct#** columns so the data repeats for every transaction listed.

Transactions (cont.)

Unposted Payments Journal *(Transactions > Transaction Journals > Unposted Payments Journal)*

The following enhancements were made so the data would display more clearly:

- A new **Print in Dr Assigned to Pmt Order** sort option was added
- A new **Print in Payment Method Order** sort option was added
- The menu function name was corrected to *Unposted Payments Journal*.

- Report title renamed to *Unposted Payments Journal* ('s' added to Payment)
- **ID#** column renamed to **Acct**
- **Patient Name** column width shortened
- **Payment Date** column renamed to **Pmt Date** (on single line)
- New **Pmt Type** column added (possible values: ROA, Co-Payment)
- New **Pmt Method** column added (possible values: CA, CK, CC, EC, OP, WP, WP - Device, PP) These values represent (Cash, Check, Credit Card, E-Check, Other Payment Type, webPAY - non device, webPAY - Device, Payment Portal)
- **Payment Code** column renamed to **Pmt Code** (on single line)
- **Payment Amount** column renamed to **Amount** (on single line)
- In the **Loc** column - if no location is stored for the payment 'None' will no longer print. It will now be left blank
- New **Pmt Dr** column added.
- If a payment has **Remarks**, they will now print under the **Pmt Date** column
- The **Total Payments** heading was moved under the **Pmt Date** column with the amount lined up under the Amount column.
- The **Grand Total** heading was moved under the **Pmt Date** column with the amount lined up under the Amount column.
- Several of the sorting options were printing extra blank lines. All of the sorts are now consistent.

Transactions (cont.)

Transaction Journals to Excel (Payment) *(Transactions > Transaction Journals > Transaction Journals to Excel)*

Global Journals to Excel (Payment) *(Reports > Corporate Reports > Global Journals to Excel)*

Added a **CGM webPAY** column to provide detailed information for CGM webPAY payments. The CGM webPAY Payment Method (**WP** or **WP-Device**) and the payment device name will display.

Daily Register to Excel *(Transactions > Transaction Journals > Daily Register to Excel)*

Added a **CGM webPAY** column to provide detailed information for CGM webPAY payments. The CGM webPAY Payment Method (**WP** or **WP-Device**) and the payment device name will display. Corrected the **Acct Date**, **Trans Date** and **Acct#** columns so the data repeats for every transaction listed.

Transactions (cont.)

Transaction Detail to Excel Reports *(Transactions > Transaction Detail to Excel Reports)*

Made enhancements so you can find the data elements you want more easily and added more data elements:

- Changed all of the Procedure based data element labels from **Trans** to **Proc**
- The 2nd set of Excel columns was changed from **Excel Columns 'AA' thru 'ZZ'** to **Excel Columns 'AA' thru 'AZ'.** Changed the individual field labels so they match up with Excel. For example, AA, AB, AC, etc.
- Added a third column of Excel columns labeled **Excel Columns 'BA' thru 'BZ'** with individual field labels that match up with Excel. For example, BA, BB, BC, etc.
- Re-ordered the drop-down list of data elements to display in Alphabetic order
- Renamed the following data elements:
    - **Trans Allowed Amt** changed to **Proc-Fee Schedule Allowed Amt**
    - **Trans Insurance Balance** changed to **Proc-Ins Bal**
    - **Trans Patient Balance** changed to **Proc-Pt Bal**
    - **Trans Total Balance** changed to **Proc-Total Bal**
    - **Trans CPT Description** changed to **Proc-CPT Desc**
- Added the following data elements:
    - Database Number
    - Primary Carrier Plan Code Desc
    - Primary Carrier Plan Code
    - Proc-MED Allowable Amount
    - Proc-RBRVS Fac Malpractice
    - Proc-RBRVS Fac Practice
    - Proc-RBRVS Fac Total
    - Proc-RBRVS Fac Work
    - Proc-RBRVS Non Fac Malpractice
    - Proc-RBRVS Non Fac Practice
    - Proc-RBRVS Non Fac Total
    - Proc-RBRVS Non Fac Work
    - Proc-Type of Service
    - Proc-Type of Service Desc
    - Secondary Carrier Plan Code Desc
    - Secondary Carrier Plan Code
    - Tertiary Carrier Plan Code Desc
    - Tertiary Carrier Plan Code