CGM LYTEC 2023 Release Notes

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CGM Lytec 2022

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Table of Contents

Chapter 1 - Enhancements

This chapter presents a high-level description of the following enhancements to the CGM LYTEC® system.

Important!

CGM recommends that you always install successive versions of the software when upgrading to ensure proper registration and data conversion.

For example, if you are currently on Lytec 2021 and are upgrading to CGM LYTEC 2023, it is recommended you upgrade to CGM LYTEC 2022 first, then register and convert your practice data. Then, from CGM LYTEC 2022, upgrade to CGM LYTEC 2023."

In this chapter

Topic	See page

Features needing setup prior to use

Feature	Setup items
Pending Transactions from Appointments	• Install Crystal Reports during installation on the CGM LYTEC Components screen • Set up security permissions
CCRD (Co-Pay, Co-Insurance, and Remaining Deductible Results from eMEDIX)	1. Enter preferred Service Type Codes on the Genral Tab of Admin > Preferences. Be sure to put the codes in preferred order BEGINNING with Code 1. Do NOT leave Code 1 blank and fill in the others.

Move Credits

New F2 functionality

The F2 button on the keyboard will now save a credit in Move Credits. It acts exactly as pressing the Post button in Move Credits.

Resources

You can now mark an existing resource as Inactive. When a resource is marked as Inactive, you will not be able to use it for appointments, or for the Wait List. The Task List and Journal features have NOT been updated and will work as they always have even if a resource is marked inactive.

Updated Resource Options

There is a new option on the Resource Options screen: Inactive check box. Use this check box to mark the current resource as inactive.

Figure 1. Resource Options screen

If there are future appointments set up with this Resource, you will receive a warning message:

Figure 2. Warning Message

CGM recommends that you move appointments off any resource you plan to make inactive before making it inactive,

Updated Open Resource screen

There is a new check box for Inactive on the Open Resource screen. Select this check box if you want to include inactive Resources on the Open Resource screen. The default value is unchecked.
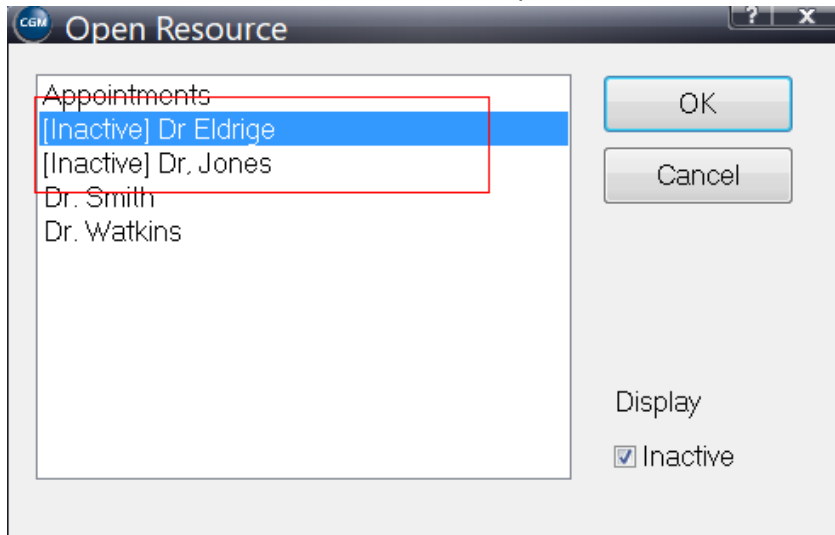

Figure 3. Open Resource screen

You can still open an inactive Resource; however, if you attempt to add or edit an appointment, you will receive a warning message that you cannot add or edit an appointment to an inactive Resource, You must first make it active again.

An inactive resource will not display in the Multi-View Grid.

If you have a pre-existing custom view with a Resource you make inactive, the Resource will display with Inactive in front of the Resource name.

If you are displaying the Inactive Resource in the appointment grid, you can cut, copy, and delete appointments from the Inactive Resource column but you cannot add or edit them.

Updated Add Custom View screen

The Add Custom Views will now display only ACTIVE resources and you can only create a Custom View with an active Resource.

Updated Edit Custom View screen

If an inactive resource is part of a Custom View, it will appear on the Edit Custom View screen so you can uncheck them from the custom display.
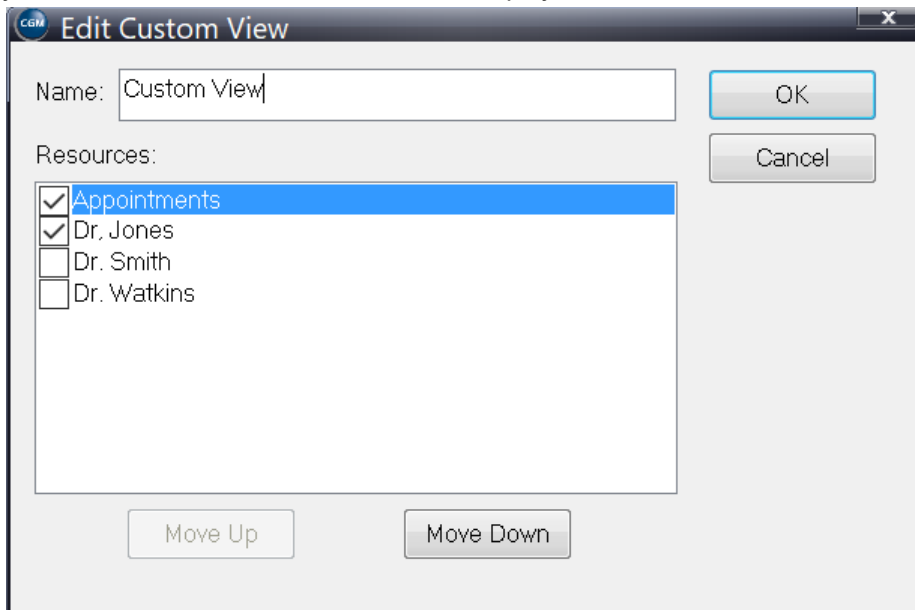

Figure 4. Edit Custom View screen

For the Custom View shown above, the grid would display like this with the word Inactive in front of the Resource Name:

Figure 5. Appointment grid - Custom View

Updated Print Custom Appointment Report screen

The Appointment Ranges tab on the Print Custom Appointment Report screen will display inactive Resources; however, the check box will be unchecked by default for these resources. If you want to include them in your report, you must manually select them.
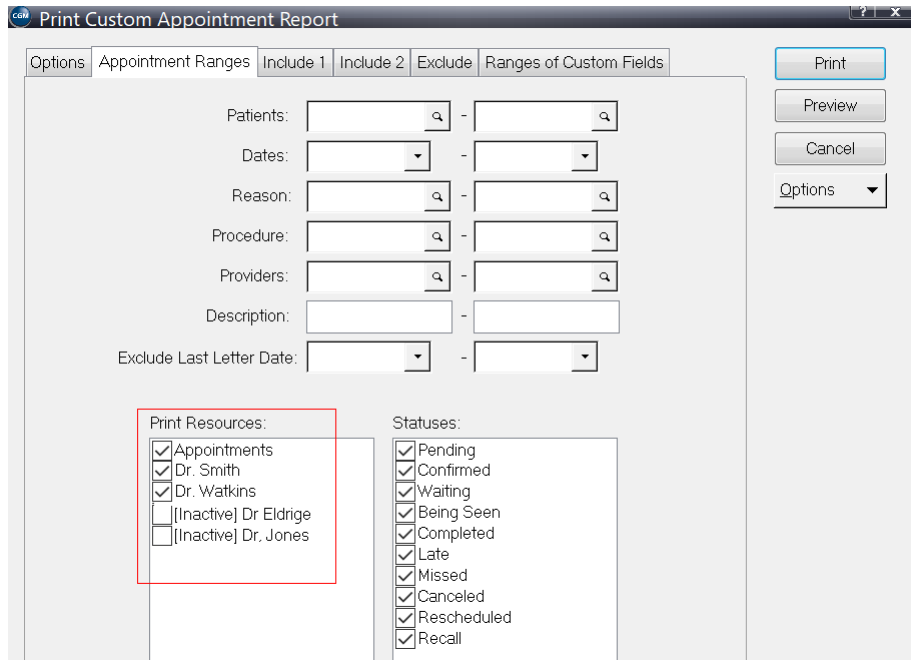

Figure 6. Print Custom Appointment Report screen

Updated Patients screen - Appointments tab

Inactive Resources that appear on the Appointments tab in the Patient record will appear in red.

Figure 7. Patients screen - Appointments tab

Updated Wait List

Updated Insert/Edit Wait List screens

Inactive Resources will NOT display in the Resource field on the Insert Wait List or Edit Wait List screens.

Figure 8. Insert Wait List screen

Updated Schedule Wait List screen

Inactive Resources will NOT appear on the Schedule Wait List screen.

Figure 9. Schedule Wait List screen

Updated Find Appointment and Cross Schedule Appointment

Inactive Resources will not appear on the Find Appointment and Cross Schedule Appointment screens.

Detail Notes in Charges and Payments

You can now add and save Detail Notes to a saved list from the Pay Item menu, opened from the Detail drop-down in Charges and Payments and from the Detail Notes field in the Detail grid. You can continue to enter free text notes here and now can also save new notes or lookup existing one.

This feature uses the same screen that is opened from the Notes lookup on the More Detail screen, and it uses the same codes that were created there. CGM eMDs recommends that you do some planning when creating saved notes that will be accessible from both locations, to help speed the lookup and selection process.

Updated Pay Items screen

There is a new lookup on the Reference field on the Pay Item screen. Clicking this will open the Lookup Billing Patient Note screen where you can create notes for the charge items.

Figure 10. Pay Item screen

The Lookup Billing Patient Note screen is the same screen that opens when you select the Note lookup on the More Detail screen.

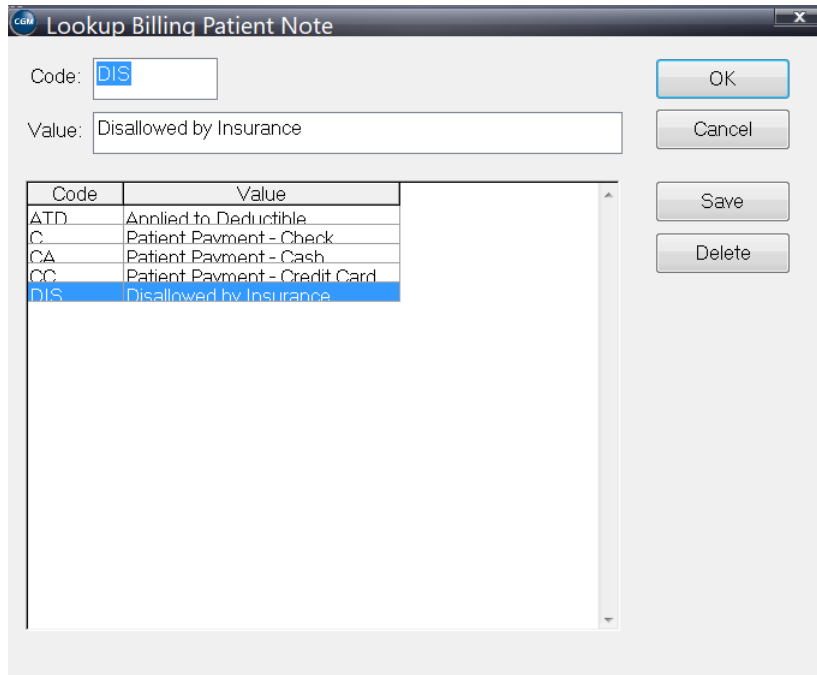*Figure 11. Lookup Billing Patient Note screen*

Updated Note Detail column

The Note Detail column in Charges and Payments now has a lookup that you can use to select one of the Notes from the Lookup Billing Patient Note screen.
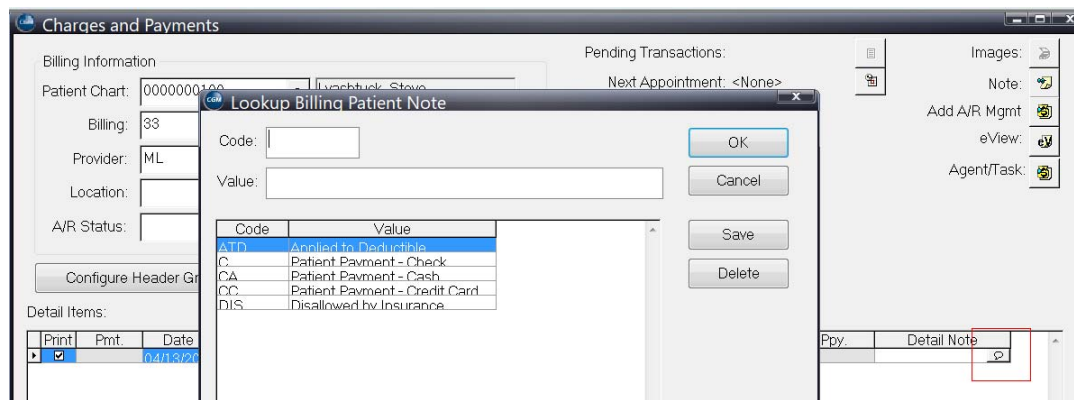

Figure 12. Charges and Payments screen

Note: You may need to add the Detail Note column to the grid. To do so, see "Displaying the Detail Note column" on page 10.

Updated Pending Transactions

Pending Transactions has also been updated with a lookup on the Detail Note column, that will open the Lookup Billing Patient Note screen.
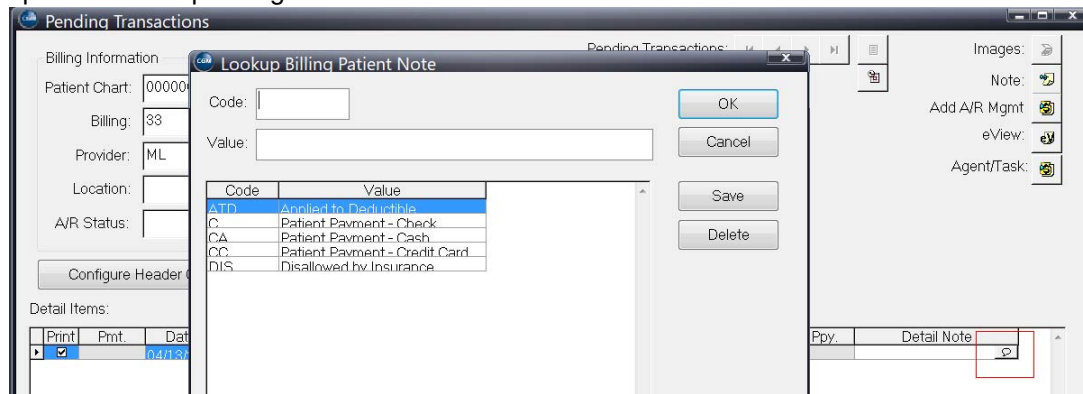

Figure 13. Pending Transactions screen

Displaying the Detail Note column

1. On the Charges and Payments screen, click the Detail button and select Detail Layout. The Edit Layout screen opens.

2. In the Table box at the top left, click Billing Detail.

3. In the Field box below the Table box, scroll to Detail Note.

4. Click the check box to the left of Detail Note.

5. Click the **Add** button. The Detail Note field is added to the grid.

6. Use the Up and Down buttons to move the Detail Note field to the position you want it.

7. Click the **OK** button.

8. Click the **Yes** button.

Pending Transactions from Appointments

Note: For this feature to work ensure that Crystal Reports has been installed during your CGM LYTEC installation on the CGM LYTEC Components screen.

You can now create Pending Transactions from appointments that have a Status of Completed. CGM LYTEC will create a pending transaction using the CPT code from the appointment's Procedure field and/or from the new Linked Transaction field to save you time by not having to create each billing individually

The table below shows the requirements for successfully creating Pending Transactions from appointment data.

Requirement	Details
Appointment Status	The appointment MUST have a Completed status.

Requirement	Details
Transaction Code and/or Linked Transaction Code	The appointment must have a Transaction Code or Linked Transaction Code entered in the Procedure and/or the new Linked Transaction field of the appointment. You can have both a selected Procedure and a selected Linked Transaction Code to create a Pending Transaction. For more information on using Linked Transactions, see "Additional Rules for Linked Transactions" on page 11.
Permanent Diagnosis Code	The created Pending Transaction will use the Permanent Diagnosis from the Patient Demographics unless Linked Transaction Codes are used. In the latter case, CGM LYTEC will use the Diagnosis selected for each CPT code in the Linked Transaction. • If a Transaction Code is selected from the appointment, CGM LYTEC will use the Permanent Diagnosis from the Patient. • If a Linked Transaction Code is selected from the appointment, CGM LYTEC will use the Diagnosis in the Linked Transaction details for each CPT/Procedure that has one. • If any of the Linked Transaction CPTs/Procedures do not have a Diagnosis assigned, CGM LYTEC will use the Permanent Diagnosis from the Patient. (it will use Permanent Diagnosis even when the Linked Transaction details is not checked to "Use Patient's Permanent Diagnosis Code".
Provider	• Add the Provider from the Appointment (if one is populated) to the new Pending Transaction. • Override any Provider from the Linked Transaction Code details and use the Provider populated on the appointment. • If there is no Provider selected on the appointment, CGM LYTEC will create the Pending Transaction without a Provider. In that case, you must select a Provider before saving the Pending Transaction.

Additional Rules for Linked Transactions
• If a Linked Transaction Code is used to create charge lines in the Pending Transaction, it will use all defaults that are set up with the Linked Transaction Code EXCEPT for Use Permanent Diagnosis, Provider, Amounts, and Place of Service.

- If a Linked Transaction exists in the appointment, when creating the Pending Transaction, CGM LYTEC will create the detail lines for all the components of the Linked Transaction Code.

- If BOTH a Transaction Code AND a Linked Transaction code are used in the appointment, CGM LYTEC will create detail lines for both the Transaction Code AND all the components of the Linked Transaction Code.

- The Transaction Code will always be the first charge line created in a Pending Transaction and then followed by the detail component charges from a Linked Transaction Code.

Creating Pending Transactions from Appointments and Record Locking

When using this feature make sure no other users are adding or editing appointments on the dates you are creating. If any users are adding or entering appointments on a date in the range of the Pending being created, the user trying to create the pending transactions will get the below error and no transactions in that date range will be created.
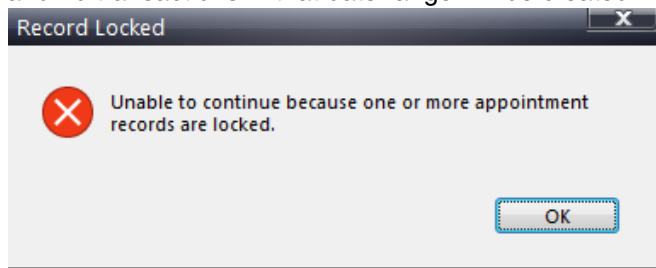

Figure 14. Record Locked message

Copying/Cutting and Pasting Appointments

If you copy/cut and paste appointments that already have Pending transactions created using the new feature to future appointment dates, those appointments will retain the Pending Transaction Status of Created from the copied/cut appointment. CGM LYTEC will NOT create Pending Transactions for those pasted appointments because it does not create pending transactions once the status is Created.

However, you can copy/cut and paste appointments to future appointment dates as normal when the Pending Transaction status is not Created.

For more information on this Pending Transaction Status, see "Updated Appointment grid" on page 16.

Linked Transaction field

New to the Insert Appointment screen is the Linked Transaction field, which you can use to select a linked transaction for the appointment. For more information, see "Updated Insert Appointment screen" on page 15.

Exception report

Any pending transactions that fail to create due to not meeting defined criteria due to not having a Procedure or Linked transaction or Appointment status other than Completed, will be listed in an Exception report that can be displayed or printed. This report will be produced at the end of the Pending Transaction creation process. For more information, see "New Pending Transactions Exception report" on page 18). The exception report may also, optionally, be produced without actually creating Pending Transactions as a "preview" of what will be created and will fail/error, if proceeding.

New Security Profile option

There is a new security option that you can use to limit access to this feature. The new option is located under Billing > Pending Transactions.
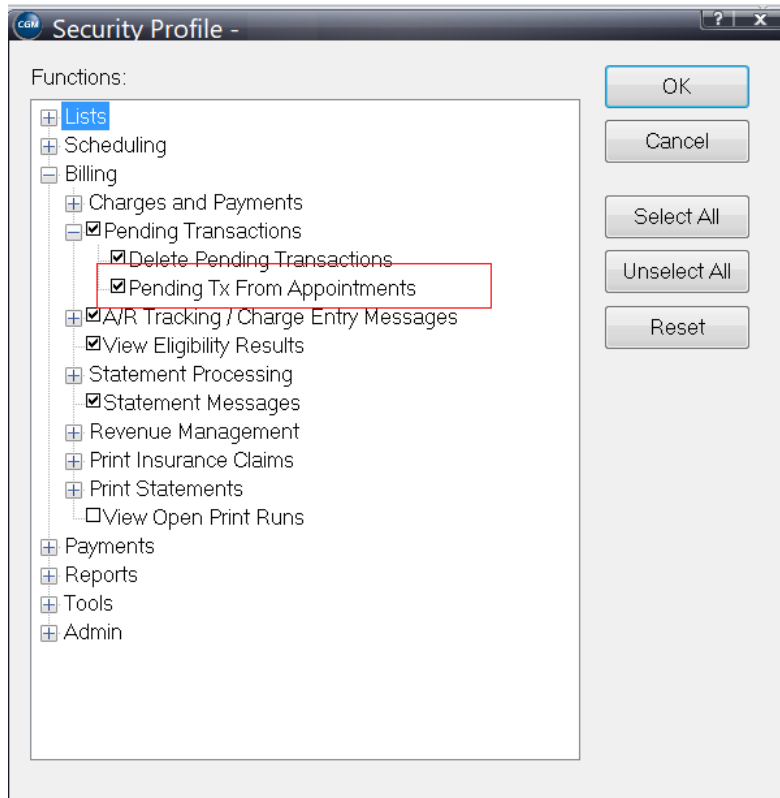

Figure 15. Security Profile screen

New menu option

There is a new option on the Billing ribbon menu: Pending Tx from Appointments. Select this option to create pending transactions from Completed appointments and open the Create Pending Transactions from Appointments selection screen.
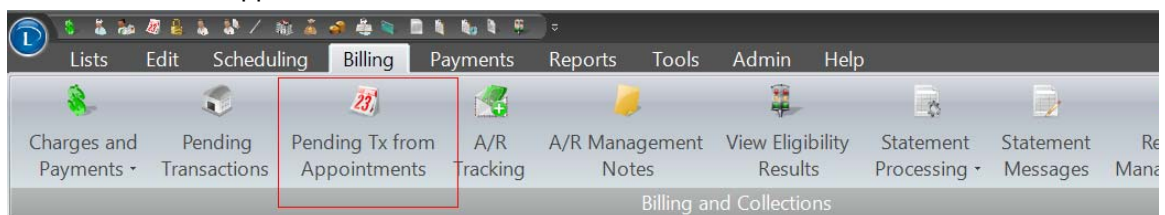

Figure 16. Billing menu

New Create Pending Transactions from Appointments selection screen

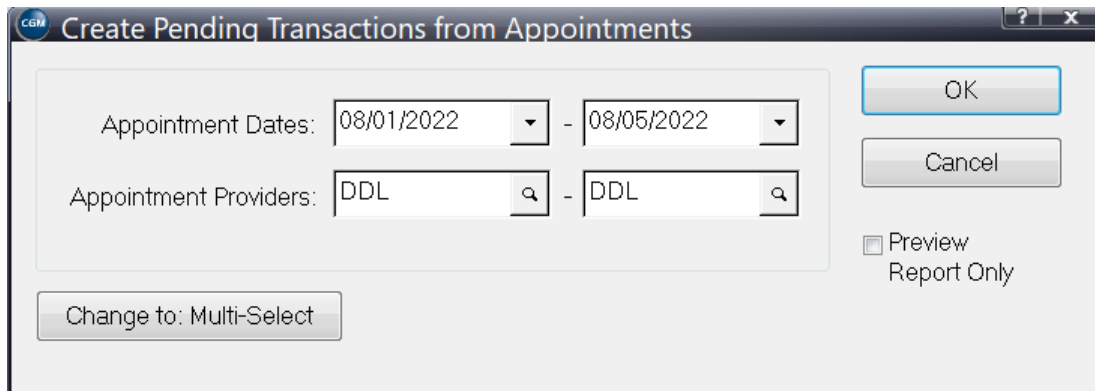Use this screen to select criteria for creating pending transactions from Completed appointments.

Figure 17. Create Pending Transactions from Appointments selection screen

The table below describes the options on this screen.

Element	Description
Appointment Dates	Select a date range using the From and To fields. These are required fields.
	Note that you cannot select a future date.
Appointment Providers	Select a provider or range of providers.
	Leave the fields blank to select all providers, which will include appointments that do not have a provider selected.
Change to Multi-select button	Use this to switch to multi-select, which you can use to select a non-contiguous range of providers.
	When you select this option, the Appointment Providers field will become a single field. Click the magnifying glass to open the Select Providers screen, on which you can select providers.
OK button	Click this button to create the transactions.
Cancel button	Click this button to cancel your selections and close the screen.
Preview Report	Select this check box if you want to see a preview of the Exception report that will show you the transactions that will be created.
	NOTE: If you select this check box, clicking the OK button will ONLY create a preview of the report. NO actual pending transactions will be created. To create the actual transactions, clear the check box and click the OK button.

Updated Insert Appointment screen

New field

There is a new field on the Insert Appointment screen: Linked Transaction. Use this field to a Linked Transaction to the appointment.

Figure 18. Insert Appointment screen

Procedure

To create Pending Transaction from Completed appointments:

1. On the Billing menu, select Pending Tx from Appointments. The Create Pending Transactions from Appointments screen opens.

2. Select the Date Range and Providers.

3. If you want to preview the Exception report first, select the Preview Report check box and click OK. Otherwise, click OK. The transactions will be created. If there are appointments that lack all of the required information the Exception Report notification screen will appear.

Updated Appointment Grid layout

There is a new option that you can add to the Appointment grid using the Edit Layout feature: Pending Transaction flag. This option is available in the Appointment Table. When you add this

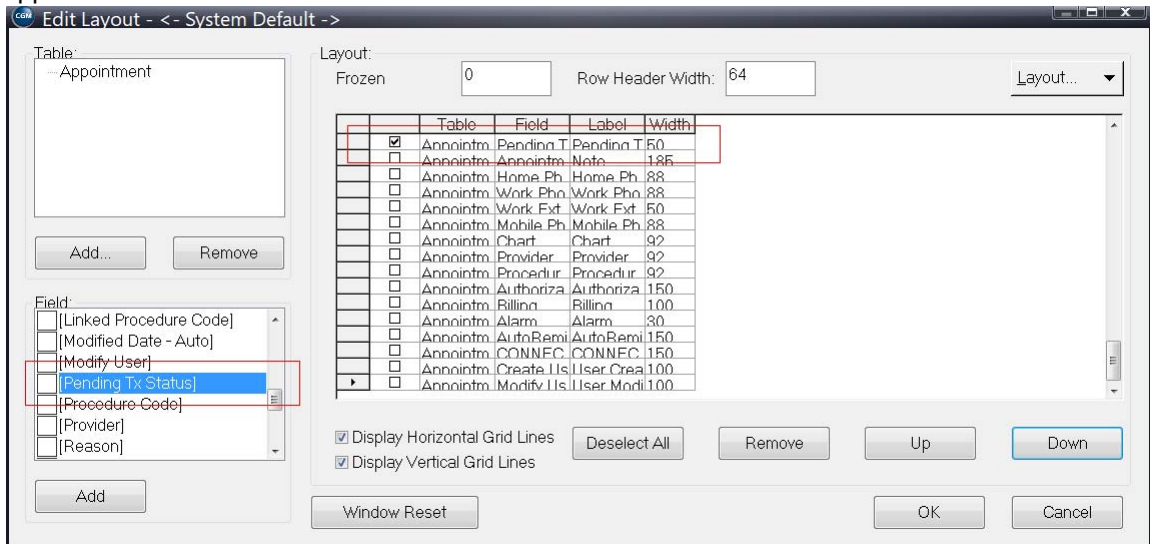column to the Appointment grid, you can see if a Pending Transaction has been created for the appointment.

Figure 19. Edit Layout screen

Updated Appointment grid

The new Pending Tx Status column in the appointment grid will show if a transaction has been created for the appointment with the word 'Created'. If an appointment was in the range that you selected to create but did not create due to not meeting requirements (missing Procedure or Linked code or not in Completed Status) this column will have 'Exception' .

Figure 20. Appointment grid will new column

Note that the column will show both Created transactions and Exceptions.

Procedure

To add the new column to the appointment grid:

1. On the Scheduling menu, select Schedule Appointments.

2. Click the Appointment button and select Schedule Layout. The Edit Layout screen opens.

3. In the Table box at the top left, click Appointments.

4. In the Column box below the Table box, scroll to Pending Tx Status.

5. Select the check box to the left of the column name.

6. Click the **Add** button below the Column box. The column is added to the layout.

7. Use the Up and Down buttons to move the column to the place you want it.

8. Click the **OK** button.

Updated Find Pending Transaction screen

The Find Pending Transaction will show transactions created from appointments in the Created By/ Application column.
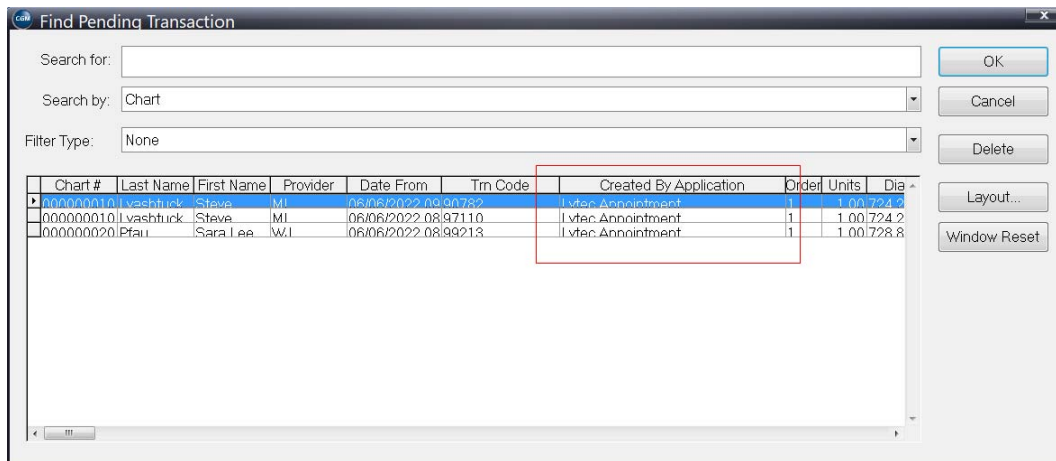

Figure 21. Find Pending Transaction screen

Note: you may need to add this column to your Find Pending Transaction grid columns.

New Exception Report notification screen

When there are appointments that do not have all of the required information in them and you attempt to create Pending Transactions from them, you will see the Exception Report notification screen. This screen will show you the number of Pending Transactions that could not be created. You can

- Print the Exception report

- Preview the Exception report to screen

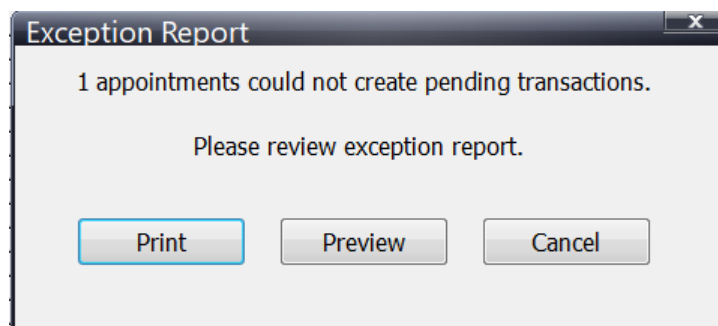- Click Cancel to close the notification screen If you cancel you cannot print the report at a later time)

Figure 22. Exception Report notification screen

New Pending Transactions Exception report

This report will show you appointments that failed to create Pending Transaction for some reason (wrong Status, missing information, and so on).

Figure 23. Pending Transactions Exception report

Patients

Updated Patient Images screen

The Date column has been relabeled to Last Updated.

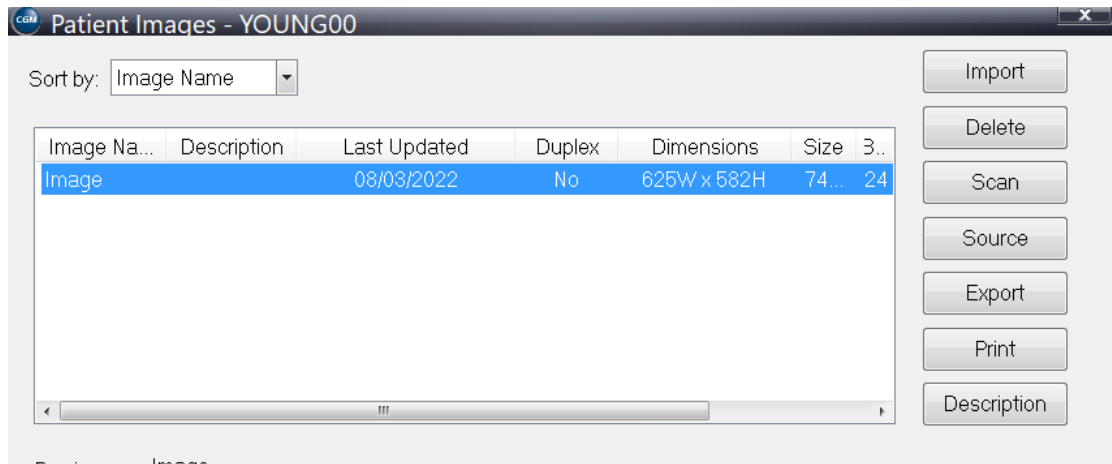*Figure 24. Patient Images screen*

This change was made to address defect 67886.

CGM CONNECTION

Updated CGM CONNECTION Configuration screen

New button

There is a new button on the CGM CONNECTION Configuration screen: Set Global Patient Preferences. Click this button to set global preferences for contacting patients.
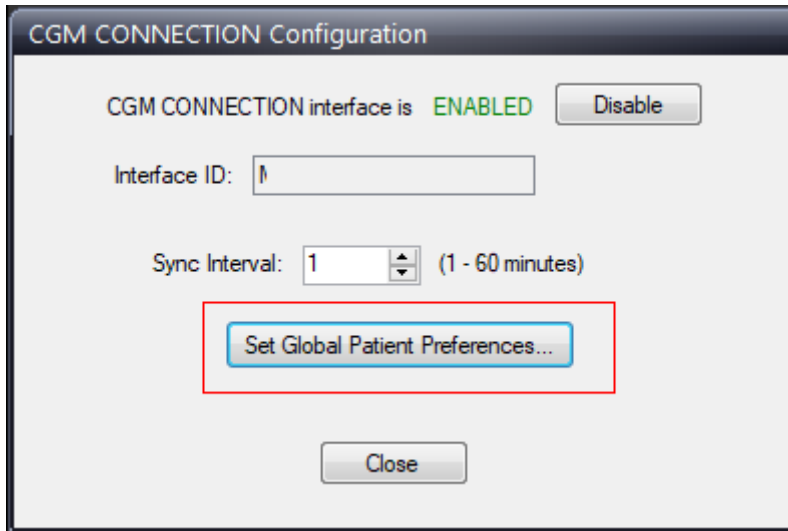

Figure 25. CGM CONNECTION Configuration screen

New Set Global Patient Preferences screen

There are new options on this screen to allow you to set global patient contact preferences, enabling you to set preferences without having to do so for each patient individually. If you want all patients to have the same set of contact preferences, use the fields here to set them.

Figure 26. Set Global Patient Preferences screen

Any choices made in the new global opt-in preferences will NOT change any existing preferences set for a patient if ANY of the contact preferences for the patient are anything other than Opt-Out or if the master opt-out check box for the patient has been checked (at the top of the Preference window.

CCRD (Co-Pay, Co-Insurance, and Remaining Deductible Results from eMEDIX)

For more information on eMEDIX, contact your CGM representative or you can visit: https://marketplace.emds.com/partner--eMEDIX-5JE-714ZM.html

If your practice uses eMEDIX for its eligibility requests, you will now see read-only values in the following new labels for information pulled from the eMEDIX Eligibility response.

Last Eligibility Request

- Co-Pay

- Co-Insurance Percentage

- Remaining Deductible

Updated screens in CGM LYTEC

These three new fields will display on the following screens:

- Patient Record

- Charges and Payments

- Insert/Edit Appointments

- Appointment grids

- Pending Transactions

- Add/Edit Wait List

- Insert Recall List

Rules

CGM LYTEC will parse and display results for Individual (IND) in EB02 (Benefit Coverage Level Code) when available. If Individual is not available, then CGM LYTEC will parse the results as follows:

For Remaining Deductible if IND is not populated:

- if there are results with EB02 blank, CGM LYTEC will select it.

For Copay or Coinsurance:

- If IND is blank, CGM LYTEC will select the first result with any value in EB02 (Family/Employee/Spouse, etc)

On Medicare results CGM LYTEC will exclude Medicare Part A for all values.

The system will always parse and display In-Network coverage (not Out-of-Network).

For this update, several updates have been made to CGM LYTEC.

Updated Preferences

Moved section

The Eligibility/EDI section on the top right has been moved to the bottom of the screen.

New fields on General tab

The single Service Type Code in previous releases has been replaced with three new fields for Service Type Code Priority Preferences, as well as a check box to indicate Specialist.

Figure 27. Preferences screen - General tab

There is no lookup provided for the codes. The Service Type Code fields can be alphanumeric with a maximum length of 3 characters. You must obtain the Service Type Codes from your own search. A possible source is: https://x12.org/codes/service-type-codes.

The new Specialist check box will be used by the practice if you wish the Co-Pay amount to be parsed from the 271 Eligibility Response for a Specialist (if it is returned), not a Primary Care Provider. With this box checked, CGM LYTEC will ALWAYS attempt to parse the Specialist Co-Pay from the EB01 B segment that has a message segment indicating specialist.

Rules

• If you have completed any of these new Service Type Code fields, when the 271 Eligibility Response if received, CGM LYTEC will parse and display the results for the 1st Service Type Code chosen

• If there are no results from the first Code, it will parse and display the results from the 2nd Service Type Code

• If there are no results to parse from the 1st or 2nd Codes, then CGM LYTEC will parse and display the results from the 3rd Service Type Code

• If there are still no results obtained, then CGM LYTEC will parse and display the results from a "general" 30 Service Type Code

- If you have NO values entered for STC, return results for 30

    Important: If you have no value in STC 1 but STC 2 or 3 is populated, it will return 30. The system will NOT look in 2 or 3 if 1 is left blank!

- If the Eligibility Responses return a 0.00 for the new fields, the system will display a value of 0 or 0.00.

- If the Eligibility Responses return an empty value, it will display an empty value rather than a zero.

    There is a difference between having a zero Co-Pay, Co-Insurance, or Remaining Deductible and not having any data (empty) for a Co-Pay, Co-Insurance, or Remaining Deductible.

Updated Service Type Code fields

The Service Type field length has been increased to 3 characters on the following screens:

- Appointment Reason Codes

- Insert/Edit Appointment

- Repeat Appointment

    Note: The Service Type Code fields in these screens are not currently used by Lytec

Updated Patient record - Patient Information tab

There are three new read-only fields on the Patient Information tab on the Patient record. These fields will display:

- Co-Pay

- Co-Insurance

- Remaining Deductible

Figure 28. Patient record - Patient Information tab

Note: The existing Co-pay field has no changes.

If the Co-pay amount returned from eMEDIX eligibility is different from the amount currently in the Co-pay field, the amount returned will appear in with a red highlight to notify you that you may want change the value in the existing Co-pay field.

Note that if a blank is returned, no value will display; if a 0.00 is returned, that will display.

Updated Insert/Edit Appointment screen

Three new read-only fields have been added to the bottom of the right-hand of the screen and appear when an appointment is selected:

- Co-Pay
- Co-Insurance

- Remaining Deductible

Figure 29. Insert Appointment screen

If the CoPay from eligibility request is different than the value in the existing Co-pay field, then CGM LYTEC will display the value highlighted in red

Note that if a blank is returned, a blank will display; in addition, if a 0.00 is returned, that will display.

Updated Charges and Payments

Three new fields have been added to the Charges and Payments screen in the Billing Header section:

- Co-Pay
- Co-Insurance

- Remaining Deductible
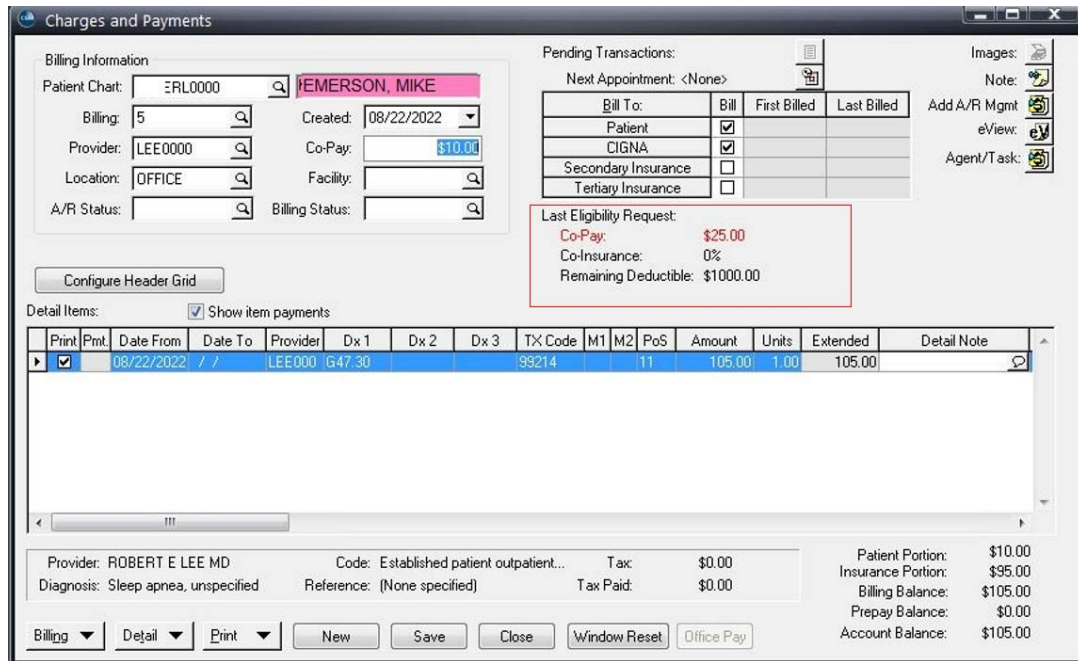
Figure 30. Charges and Payments

If the CoPay from the eligibility request is different than the value in the existing Co-pay field, then Charges and Payments will display the value highlighted in red

Note that if a blank is returned, a blank will display; in addition, if a 0.00 is returned, that will display.

Updated Pending Transactions

Three new fields have been added to the Pending Transactions screen in the Billing Header section:

- Co-Pay

- Co-Insurance

- Remaining Deductible

Updated Add/Edit Wait List

Three new fields have been added to the Add/Edit Wait List screen:

- Co-Pay

- Co-Insurance

- Remaining Deductible

Updated Insert/Edit Recall Appointment

Three new fields have been added to the Insert/Edit Recall Appointment screen:

- Co-Pay

- Co-Insurance
- Remaining Deductible

Updated Appointments grid display

You can add these three new fields to your Appointment grid display using the Edit Layout feature.

Updated Edit Layout screen

These three new fields are available to be added from the Appointment table using the Edit Layout screen.

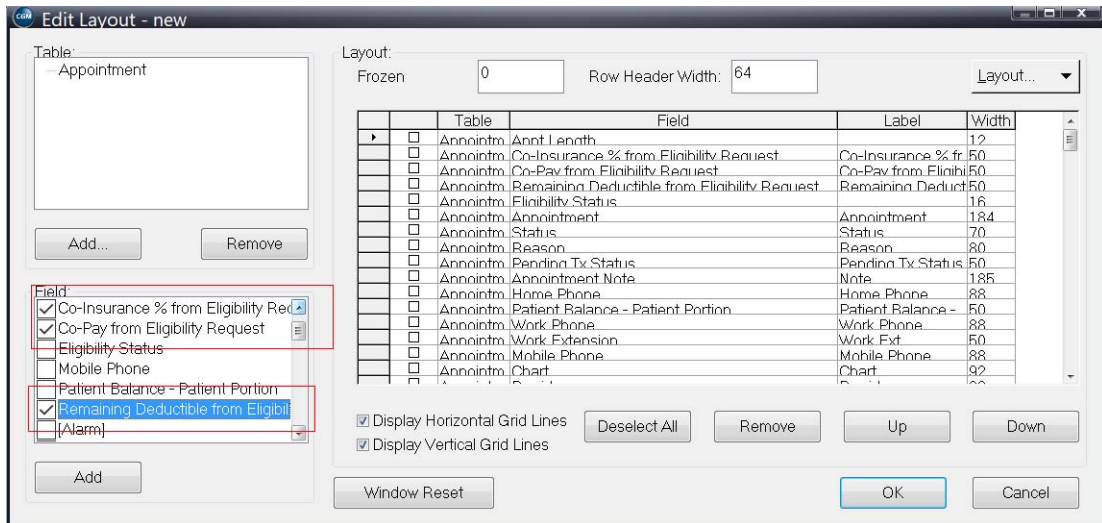*Figure 31. Edit Layout screen*

Once the fields are added, they will appear in the Appointment grid.

Figure 32. Appointment grid

Procedure

To add CCRD fields to the Appointment Dgrid:

1. On the Scheduling ribbon menu, click Schedule Appointments.

2. Click the **Appointment** button and select Appointment View and then Layout.

3. In the Table box at the top left, click Appointments.

4. In the Field box below, select the check boxes for Co-Insurance % from Eligibility Request, Co-Pay from Eligibility Request, and Remaining Deductible for Eligibility Request.

5. Click the **Add** button. The three items are added to the list of column headers.

6. Use the Up and Down arrows to place the column headers in the order you want them.

7. Click the **OK** button.

NOTE: Adding these fields to the main schedule grid may impact performance. If you are interested in having them on the main grid, add them and check for performance issues. If there is an effect on performance, simply remove them and add them to the Details grid (see below).

Updated Appointment Details grid display

You can add these three new fields to your Appointment Details grid display at the top of the Scheduling view using the Edit Layout feature. By adding the new fields to the Appointment Details grid, you can view the new eligibility information for each patient on the schedule as you click on an appointment.

Updated Edit Layout screen

These three new fields are available to be added from the Appointment table using the Edit Layout screen.
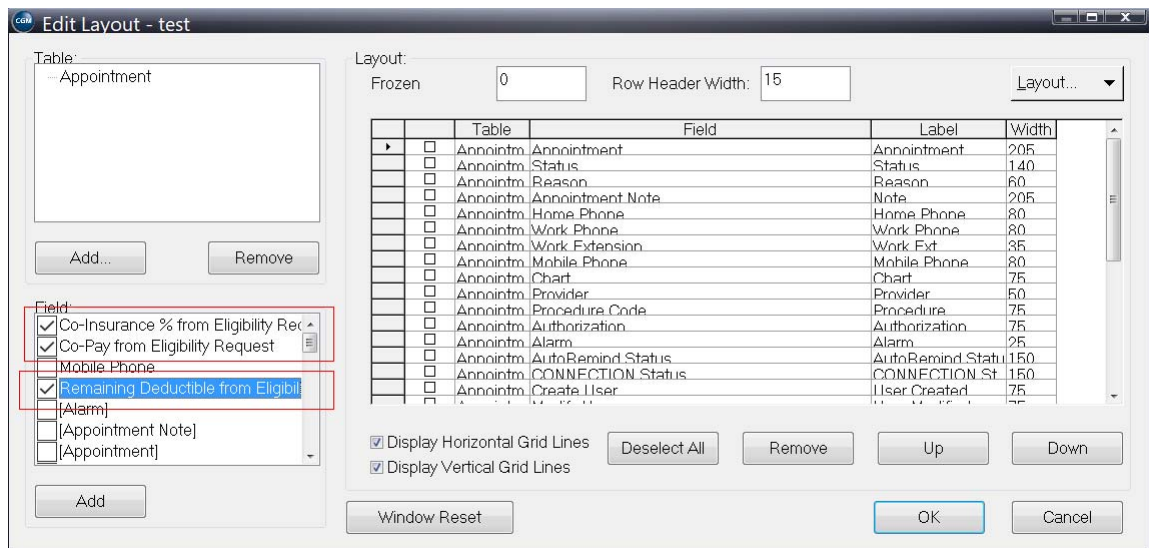

Figure 33. Edit Layout screen

Once the fields are added, they will appear in the Appointment Details grid at the top.

Figure 34. Appointment Details grid

Procedure

To add CCRD fields to the Appointment Details grid:

1. On the Scheduling ribbon menu, click Schedule Appointments.

2. Click the **Appointment** button and select Appointment Detail and then Layout.

3. In the Table box at the top left, click Appointments.

4. In the Field box below, select the check boxes for Co-Insurance % from Eligibility Request, Co-Pay from Eligibility Request, and Remaining Deductible for Eligibility Request.

5. Click the **Add** button. The three items are added to the list of column headers.

6. Use the Up and Down arrows to place the column headers in the order you want them.

7. Click the **OK** button.

CGM APRIMA Interface

New fields

Several new demographic fields have been added to the CGM LYTEC to CGM APRIMA Interface. The information in these fields in the CGM LYTEC patient record will be transferred to CGM APRIMA. These include:

*   Previous Name   (send with initial bulk load, if exists, and then send current Patient Name data)

*   Previous Address   (send with initial bulk load, if exists, and then send current Address data)

*   Birth Sex

*   Gender Identity

*   Sexual Orientation

Chapter 2 - Resolved Issues

The following issues were resolved with CGM LYTEC 2023.

PBI	Application	Description
90254		CGM LYTEC: Demonstration Code field will now allow leading zeros. The Max field length is now 20 characters and accepts any character. Steps to recreate 1. In CGM LYTEC, select Charges and Payments > Charges and Payments. 2. Select a patient. 3. On the Billing drop-down, select Bill Options. 4. Select the Billing More Information 2 tab. 5. Complete the fields and enter a Demonstration Code that has leading zeroed. 6. Close the tab. 7. Reopen the tab and verify that the leading zeros remain.
68333	Pending Transactions	When selecting and saving charges in Pending Transactions, the focus will now return to the next line item after saving. Steps to recreate 1. Open Pending Transactions in CGM LYTEC. 2. Open the Find Pending Transactions list. 3. Select a line item and Save the charges. 4. Open the Find Pending list again. 5. Verify that the focus is on the next line item.
68357	Pending Transactions	Two or more users can no longer save the same Pending Transaction at the same time. Record locking has been added to allow only one user to save. Steps to recreate 1. Have two users open the same transaction in Pending Transactions. 2. Verify that the Save button is disabled for one user.