



CGM LYTEC 2025 Release Notes

December 2024

CGM LYTEC

Practice Management and EHR

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Chapter 1 - Enhancements

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

Note: you may notice several changes to the software for use with eMEDIX statements which are not yet functional which are there in preparation for an upcoming release that will be fully documented at that time.

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 2023 and are upgrading to CGM LYTEC 2025, it is recommended you upgrade to CGM LYTEC 2024 first, then register and convert your practice data. Then, from CGM LYTEC 2024, upgrade to CGM LYTEC 2025.

Patient Responsibility Estimate with No Insurance

Patient Responsibility Estimate requires a subscription.

Patient Responsibility Estimate has been updated so you can now generate an estimate for patients who do not have insurance (self-pay patients).

Several changes have been made.

Updated Preferences

Updated eMEDIX Estimate tab

There is a new box and button for a message to be added to Patient Responsibility Estimates for patients without insurance. You can update this message as necessary and click the Reset to Default button to return the message to its default content.

To create a new paragraph in the Estimate box, use <ctrl> + <Enter>.

Preferences

Year-to-Date | Billing Cycle | Passwords | Color Coding | Image Formats | eMEDIX Statements | eMEDIX Estimate | Bill

Website URL:

Patient Estimate Message:

Reset to Default

Patient Estimate Message for Self-Pay Patients:

Reset to Default

OK Cancel

Figure 1. Preferences - eMEDIX Estimate tab

Updated Patient Responsibility Estimate screen

New message

When you open the Patient Responsibility Estimate screen and there is no primary insurance for the patient, you will see a message asking you if you want to create a self-pay estimate. Click OK to continue with the estimate.

Insurance Information Not Found

? Patient YOUNG00 does not have a primary insurance code.

Would you like to create a Self-Pay estimate?

OK Cancel

Figure 2. New message

Changes on Patient Responsibility Estimate screen for self-pay patients.

When the user opens this screen, if there is no primary insurance on the patient, a Payer ID will not be required. Also, the 3-day completed Eligibility response is not required.

The system essentially takes the CPT code and Description, along with the Charge Amount and Units to produce a Patient Estimate that can be displayed, printed, and saved in Estimate History.

Patient Responsibility Estimate

Patient Chart: YOUNG00
 Last Name: Young
 First Name: Bert
 Middle Name: B
 Street 1: 1200 Milky Way
 Street 2:
 City: Cocoa Beach
 State: FL
 Zip: 33333
 DOB: 1/8/1930
 Sex: Male

Primary Insurance Code:
 Primary Insurance Name:
 Primary Insured ID:
 Relation to Insured: Self
 Provider: Dr. Michelle Lynn

Facility Code:

Transaction Code	Description	Units	Charge
90718	TD Immunization	1	18.00

Add Linked Transaction... Submit for Estimate Cancel

Figure 3. Patient Responsibility Estimate screen

CGM PAY

CGM PAY requires setup with eMEDIX and a credit card merchant agreement with Global Pay.

CGM PAY allows you to process patient payments in the office with credit cards, ACH direct debits, and create payment plans for patients. A Payment Plan means that the patient's credit card or bank account can be set to automatically charge each month. This is also referred to as Recurring Payments. You can also allow patients to pay online for a single payment and choose to allow them to set up a payment plan. Allowing online payment plans can be disabled when you set up this feature in eMEDIX.

Several updates have been made.

Updated Preferences

Renamed eMEDIX Statements tab

The eMEDIX Statements tab has been renamed eMEDIX Statements/CGM PAY.

The screenshot shows the 'Preferences' dialog box with the 'eMEDIX Statements / CGM PAY' tab selected. The tab is highlighted with a red box. The dialog contains several sections: 'eMEDIX Account' with fields for 'Webservice User' (bopws1), 'Webservice Password' (masked), 'Submitter ID' (PBTX00032), and 'TPID' (BOP); 'eMEDIX Statements' with 'Credit Cards Accepted' (checkboxes for Visa, Master Card, Discover, American Express) and 'Shading' (radio buttons for Black, Blue, Red, Green); 'Service Message' with three numbered text boxes; and 'Statement Messages' with a 'Top:' label and five numbered text boxes. A 'Time of Day for Recurring Payments' field is also present, showing '1:40 PM' with a red box around it. The 'OK' and 'Cancel' buttons are at the bottom right.

Figure 4. eMEDIX Statements/CGM PAY tab

New field

In addition, there is a new field: Time of Day for Recurring Payments. Use this field to set the time of day that payments in payment plans will be posted. It is recommended to choose a time when

the office is not working in CGM LYTEC, such as in the early morning hours before the practice opens.

Preferences

Reports | Year-to-Date | Billing Cycle | Passwords | Color Coding | Image Formats | **eMEDIX Statements / CGM PAY**

eMEDIX Account

Webservice User: bopws1

Webservice Password: ●●●●●●●●

Submitter ID: PBTX00032

TPID: BOP

CGM PAY

Time of Day for Recurring Payments:

☐ 1:40 PM

eMEDIX Statements

Credit Cards Accepted

☐ Visa

☐ MasterCard

☐ Discover

☐ American Express

Shading

☒ Black

☐ Blue

☐ Red

☐ Green

Service Message

1.

2.

3.

Statement Messages

Top:

1.

2.

3.

4.

5.

OK Cancel

Figure 5. Preferences - eMEDIX Statements/CGM PAY tab

Note: the check box is cleared by default. If you have recurring payments, select the check box.

Access to CGM PAY is controlled by the Transmit eMEDIX Statements permission.

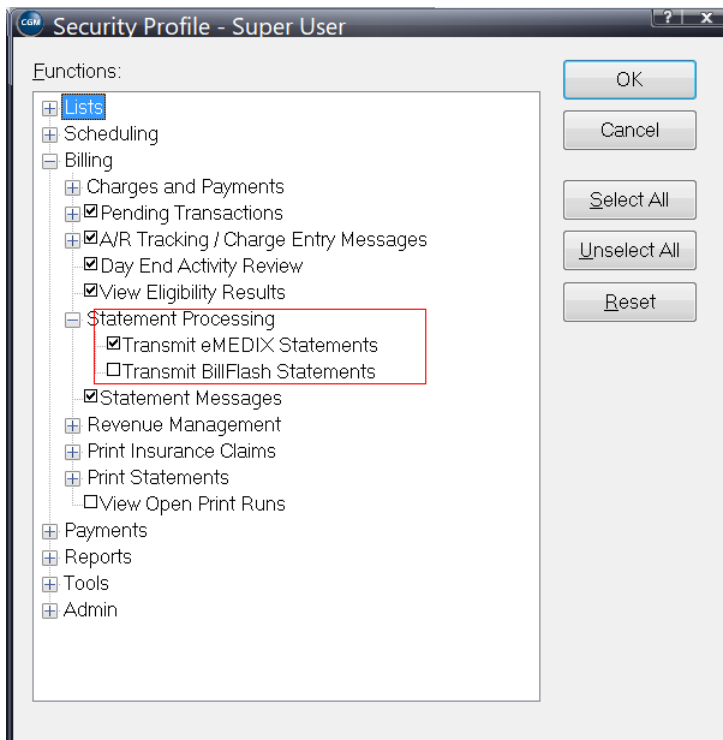


Figure 6. Security Profile window

Updated Payments menu

There is a new option on the Payments menu: CGM PAY Dashboard. Click this button to open the CGM PAY Dashboard.

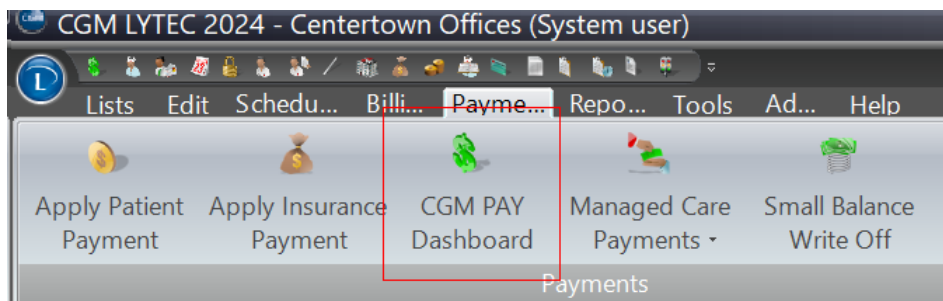


Figure 7. Payments menu

New CGM PAY Dashboard

There is a new dashboard that shows you all of the payments made using CGM PAY. From this screen, you can see the payments, create new payment methods, void payments, and delete recurring payment plans.

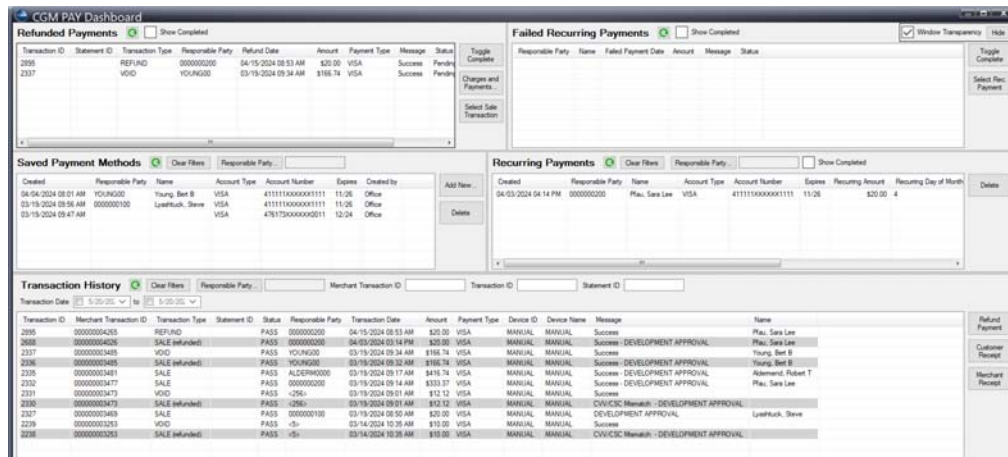


Figure 8. CGM PAY Dashboard

The following two buttons are for the behavior of the screen.

Window Transparency check box	Select this check box if you want the CGM PAY Dashboard screen to be transparent.
Hide button	Select this to temporarily hide the grid and access other parts of CGM LYTEC. To bring the grid back up, select CGM PAY Dashboard again from the ribbon.

The table below describes the elements on this dashboard.

Element	Description
Refunded Payments section	
	This section shows you the payments that were refunded to the patient's credit card. This alerts you to payments that you now need to manually enter a refund for in Charges and Payments to offset the fact that the card has been refunded
	Click the green circular arrow button to refresh the list in this section.
Show Completed check box	Select this check box if you want to see the payments that have been completed.
Toggle Complete	Click this button once you have manually refunded the payment to mark it Completed. It will then be removed from the list. If you need to change it back to not completed click the button again and it will revert to Pending Status.

Element	Description
Charges and Payments	Click this button to open the Charges and Payments screen. • If a billing is found for the corresponding sale transaction, that billing is opened. If a payment has been posted. it should be able to be 'found'. If it can't be found (not yet posted to charges), a new billing is opened allowing you to search the prior billings to select which one to post the refund to • If the responsible party has only a single dependent (self or otherwise), it goes directly to a billing. • If the responsible party has more than one dependent (possibly including Self), a popup menu lets you select one before navigating to a billing.
Select Sale Transaction	Highlight a payment in the Refunded Payments section and click this button to highlight the Sale transaction that was voided/refunded in the Transaction History section at the bottom of the screen.
Failed Recurring Payments section This section shows you the recurring payments that failed. Any payments which failed by the payment processor will show here. Additionally, the system will only process one recurring payment at a time for a responsible party. If one is already set up and another is created, the second one will display here as failed. All failed plans will be highlighted in red in this section and in the Recurring payments section Click the green circular arrow button to refresh the list in this section.	
Show Completed check box	Click this button if you want to see the failed recurring payments that are complete.
Select Rec Payment	Click this button to select the highlighted payment and see the details for it in the Recurring Payments section.
Saved Payment Methods section This section shows you the payment methods (credit cards, ACH direct debits, debit cards, etc) that have been saved. You can also add a new saved method here to be used in the future. Click the green circular arrow button to refresh the list in this section.	
Clear Filters button	Click this button to clear the contents of the Responsible Party filter.
Responsible Party button and field.	Click the button to open the Select Responsible Party screen. Select a patient or guarantor and click OK. The contents of the Saved Payment Methods grid will update.

Element	Description
Add New	Click this button to add a new payment method. When you click the button, a window will open allowing you to select a patient or guarantor.
Delete button	Click this button to delete the highlighted payment method.
Recurring Payments section Shows you the active payment plans. If there are recurring payments to be processed on a particular day of the month and there is some issue (ex. customer Internet down on that day), the system will continue to try to process the plan for entire day from the time set in the Preference setting. Once the date changes, it will not process until next month on that day. This will show as a missed payment in the Failed Recurring Payments section. Click the green circular arrow button to the right of the name to refresh the list. Once a Plan is complete, it will be removed from the list unless the Show Completed box is selected.	
Clear Filters button	Click this button to clear the contents of the Responsible Party filter.
Responsible Party button and field.	Click the button to open the Select Responsible Party screen. Select a patient or guarantor and click OK. The contents of the Recurring Payments grid will update.
Delete button	Click this button to delete the highlighted recurring payment plan.
Transaction History section Shows you all the transactions in the system. Click the green button to the right of the name to refresh the list. To refund a payment 1. In the Transaction History section, find the transaction to be refunded and highlight it. 2. Click the Refund Payment button to the right of the Transaction History section. 3. Click the OK button on the Confirmation screen. The payment appears in the Refunded Payments section in a Pending state. A refund transaction will display in the History section once processed and will also add a line in the Refunded Payments section to remind the user to add a refund to Charges and Payments.	
Clear Filters button	Click this button to clear the contents of the Responsible Party filter.
Responsible Party button and field	Click the button to open the Select Responsible Party screen. Select a patient or guarantor and click OK. The contents of the Transaction History grid will update.
Merchant Transaction ID	Enter a Merchant Transaction ID to filter the list of transactions for that ID. Once you enter the ID, click the Enter key and the list will update. To clear the filter, click the Clear Filters button.

Element	Description
Transaction ID	Enter a Transaction ID to filter the list of transactions for that ID. Once you enter the ID, click the Enter key and the list will update. To clear the filter, click the Clear Filters button.
Statement ID	Enter a Statement ID to filter the list of transactions for that ID. Once you enter the ID, click the Enter key and the list will update. To clear the filter, click the Clear Filters button.
Transaction Date Range	Use the Date fields to filter the list by date range. To clear the filter, click the Clear Filters button.
Refund Payment button	Click this button to refund the highlighted payment. This will refund the credit card. Once it is refunded, it will move to the Refunded Payments section where you will manually add the refund to Charges and Payments.
Customer Receipt	Click this button to open the receipt in your default text editor.
Merchant Receipt	Click this button to open the receipt in your default text editor.

Adding a new Payment Method (This will do an authorization on the account to save for future use.)

1. From the Payments ribbon menu, select CGM PAY Dashboard. The Dashboard opens.
2. Click the **Add New** button on the Payment Methods section.
3. The Select Responsible Party screen opens.

4. Select a patient or guarantor and click the OK button. CGM PAY opens.

Payment

1 Initiate Payment 2 Enter Payment Details 3 Confirmation

Payment Identifier

507

Submitter

Submitter 1

Select Payment Method

☐ Key In Values Manually (Check) ☐ Key In Values Manually (Credit Card)

☐ Holly's wired

Cancel Next

Figure 9. Initiate Payment screen

5. Select Payment method corresponding to the payment you are doing. You will see any credit card devices that you have configured on the eMEDIX portal.
6. Once you select Next, you will be prompted to enter the payment method details or use the credit card device.

Payment methods can also be saved while you are making a CGM Pay payment from other screens.

Updated Charges and Payments, Patient Payment Wizard, Patient Prepayment, and Enter Copay as Prepayment

There is a new button on these screens: CGM PAY. Clicking this button will launch an eMEDIX payment screen so that you can enter a patient's payment via credit card or ACH (checking or savings) payment.

Pin	Rate	From	Date To	Diagnosis	X	Code	M	Pos	Amount	Units	Extended	Expected	Pay
1	0.00	05/20/2024	05/20/2024	M		7242		CASH	100.00	1.00	-100.00	0.00	

Patient Portion:	-\$100.00
Insurance Portion:	\$0.00
Billing Balance:	-\$100.00
Prepay Balance:	\$0.00
Account Balance:	-\$26.00

Figure 10. Charges and Payments screen

Note: You must have the eMEDIX Account fields completed on the eMEDIX Statements/CGM PAY tab in Preferences.

Procedures

Entering a payment from Charges and Payments

1. In Charges and Payments, select a patient and enter a Transaction Code for a credit card or check or if you leave the code blank the system will select the first code it finds corresponding to the type of payment). If you have entered an amount in CGM LYTEC, it will display in both the Total Patient Balance and Payment amount fields.
2. Enter an amount or leave it blank and fill it in on the next screen.

- Click the CGM PAY button. CGM PAY opens.

Payment

1 Initiate Payment 2 Enter Payment Details 3 Confirmation

Payment Identifier
505

Submitter
PBTX92147 (Submitter 1)

Total Patient Balance
[Empty field]

Select Number of Months
[Empty field]

Future Monthly Payment Date
[Empty field]

Payment Amount
[Empty field]

☐ Save Payment Method On File

Select Payment Method

☐ Key In Values Manually (Check) ☐ Key In Values Manually (Credit Card)

☐ Holly's wired

Cancel **Next**

- If this is a single one time payment, leave Select Number of Months and Future Monthly Payment Date blank
 - If you wish to save this payment method for future use, check the Save Payment Method on File box and it will display the next time you do a payment for this patient. It will also display in the CGM PAY Dashboard Saved Payment Methods section.
- Select Payment method corresponding to the payment you are doing. You will see any credit card devices that you have configured on the eMEDIX portal. You can also choose to manually enter the credit card or bank account information by checking Key In Values Manually
 - Once you select Next, you will be prompted to enter the payment method details or use the credit card device.
 - Once complete, you will have the option to Print a receipt. If you forget to print a receipt while this window is open, or need to reprint a past receipt you can also print it from the CGM PAY dashboard

Entering a Copay from the Schedule

- On the schedule, right-click an appointment and select Enter Copay as Prepayment. The Enter Copay as Prepayment screen opens.
- Enter an amount and select a Transaction Code. (You can also leave both blank and they will be populated for you once the payment is complete. If you leave the code blank, the system will select the first code it finds corresponding to the type of payment).
- Click the CGM PAY button and follow the prompts in CGM PAY.

Using the Patient Payment Wizard

1. On the Payments menu, click Apply Patient Payment. The Apply Patient Payment screen opens.
2. Click the CGM PAY Payments button and follow the prompts in CGM PAY
3. Follow the steps of the wizard to apply the payments to patient balances.
 - Payments made here will display in the Recurring Online Payment list until the payment has been posted to charges.
 - You cannot leave the payment code blank since the wizard requires a code.

Creating a payment plan

1. Click the CGM PAY button on a screen. CGM PAY opens.
2. Enter values in the Select Number of Months and Future Monthly Payment Date. The Save Payment Method for future use will be automatically checked when creating a recurring plan. You can change the Total Patient Balance amount as needed. The payment amount will be calculated based on the balance and number of months.
3. Finish processing the payment. The recurring payment will appear on the CGM PAY Dashboard.

Important: If you have selected to allow patients to make online payments (single or recurring) or are doing in-office recurring payment plans, you must select the Fetch CGM PAY payments from the Patient Payment Wizard on a regular basis to pull the payments in to the Online remittance list for posting.

How the recurring payment works:

Every month on the selected date a payment will process as long as the patient has a patient balance.

You can see the system calculated patient balance on the CGM PAY dashboard in the Balance at Last Payment column in the Recurring Payments section.

Important Notes:

- The system will not process an amount more than the patient balance; so if the balance is less than the original Recurring amount (ex. If another payment was made in the system or an adjustment to balance was made), the processed amount will be less than the Recurring amount.
- The system **will continue the recurring payment as long as there is a patient owed balance** (not including Insurance owed amounts). For example, if the patient has new charges before the recurring payment plan completes, the card or bank will be charged the next month even though the plan was set to complete this month.
- You may notice a difference between the Lytec balance and the Balance at Last Payment. The Balance at Last Payment will subtract any payments processed via CGM PAY that may not yet have been fetched into the Patient Payment Wizard as well as those fetched but not yet applied. This is done to ensure you do not to charge an account for more than an amount owed.

If you have set up online payments with eMEDIX and choose to allow your patients to set up a recurring payment plan online, see eMEDIX documentation for those instructions.

Note: Restrictions set up in eMEDIX, like Minimum Amount for a recurring plan, are for online payments only. Plans set up in CGM LYTEC can be for any amount you want.

Charge Entry Messages

New Copy button

There is a new Copy button on the Charge Entry Messages screen. Use this button to quickly copy an existing rule. Highlight the rule you want to copy and click Copy to copy the message. Then, make any changes to the rule and click OK and save it.

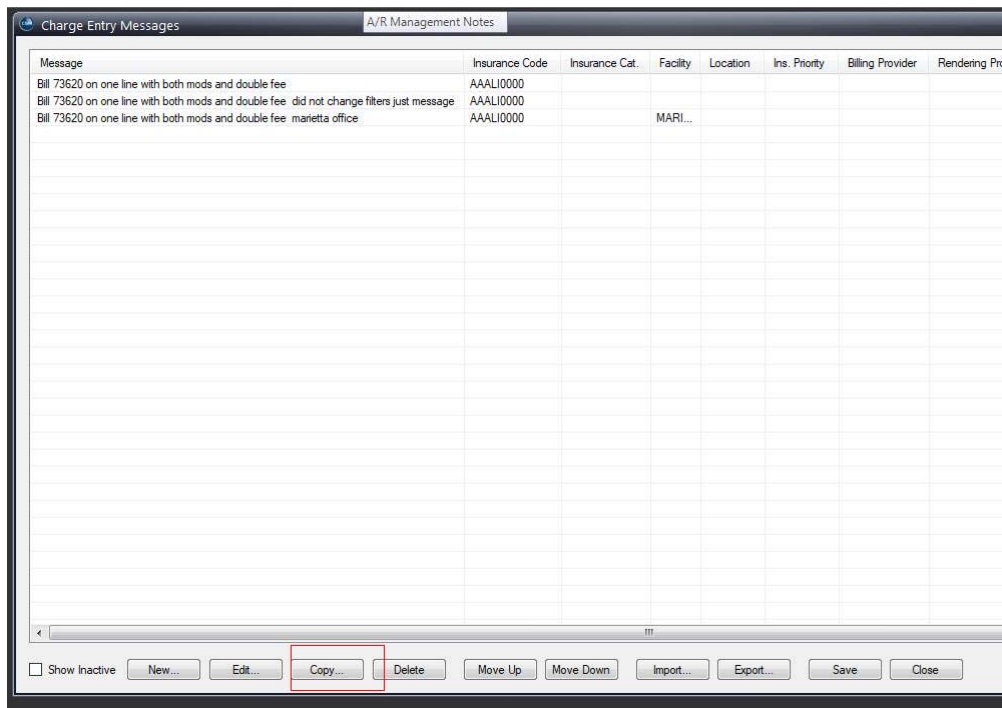


Figure 11. Charge Entry Messages screen

New Date Filter

There is a new Date filter for Charge Entry messages.

New Charge Entry Message

Insurance Code		Q	X
Insurance Category		Q	X
Facility		Q	X
Location		Q	X
Insurance Priority	☒ Any ☐ Primary ☐ Secondary ☐ Tertiary		
Billing Provider		Q	X
Date of Service	7/10/2025 to 7/10/2025	Q	X
Rendering Provider		☒ Present ☐ Missing	Q
Diagnosis Code		☒ Present ☐ Missing	Q
Transaction Code		☒ Present	Q
Modifier		☒ Present ☐ Missing	X
Rendering Provider		☒ Present ☐ Missing	Q
Diagnosis Code		☒ Present ☐ Missing	Q
Transaction Code		☒ Present ☐ Missing	Q
Modifier		☒ Present ☐ Missing	X
Message Text			

Figure 12. New Charge Entry Message screen

- You can specify a From and To date to set a Date of service range for the message to alert.
- For transactions before a certain Date of Service, use only the To date field
- For transactions after a certain Date of Service, use only the From field

Note: the new date fields have been added to Import/Export.

A column for the Date of Service appears on the Charge Entry Messages screen.

[illegible]

Figure 13. Charge Entry Message screen

Reports

Updated Keyword Filtering

The following reports now have an option for Keyword Filtering:

- Print Transaction Journal
- Print Day Sheet
- Print Patient Ledger
- Print Prepayment Activity

The new search allows you to find partial matches of the reference text rather than exact matches. For example, if you want to find how Check # 5678 was distributed, but you do not know if the biller entered the reference note as Ck #5678, Check # 5678, or CK5678, you can now find it using this new option by entering simply "5678"

The Print Settings screens have a new option: Partial Match.

Figure 14. Print Transaction Journal

The Partial Match option will look for the text you type in anywhere in the detail note field. It is NOT case-sensitive.

When you print the report, the cover page will show the partial match.

Patient Demographics

New Insurance History

You can now see the patient's insurance history in the patient demographics.

Updated Insurance tabs

The Primary, Secondary, and Tertiary Insurance tabs have a new button: Add to History. Clicking this button will add the information on that tab to the new Insurance History screen.

Clicking the Add to History button is a manual process. Create a habit of clicking the Add to History button first, any time you are changing data in the Insurance tab.

Patients - Steve Lyashtuck

Patient Chart: 0000000100

Responsible Party: <Self>

Claim Information | Diagnosis/Reminders | Contacts | Appointments | Patient Images | Custom Fields

Patient Information | **P=National Mutua...** | Secondary Insurance | Tertiary Insurance | Associations

Add to History

Insurance

Insurance Code: NM Authorization:

Insurance Name: National Mutual Claim Number:

Type: Employer Accept Assignment: Y-Yes

Group Number:

Group Name:

Insured ID Number/MBI: 12-345678

Legacy Medicare ID:

Effective Dates: From: To:

☒ Bill insurance automatically

Insured: Insured: <Self>

Relation to Insured: Self (18) Set Insured

Number of Visits Allowed/Used: P = 0 S = 0
 Primary Insurance Balance: \$74.00
 Secondary Insurance Balance: \$0.00
 Tertiary Insurance Balance: \$0.00

Prepayment Balance: \$0.00
 Patient Balance: \$0.00
 Next Appointment: No Next Appointment
 Previous Appointment: 07/31/2024

Last Eligibility Request:
 Co-Pay:
 Co-Insurance:
 Remaining Deductible

Buttons: New, Save, Delete, Responsible Party..., Patient, Family, Patient Ledger, Edit Patient Notes, A/R Mgmt Notes, Print, Get Card Data, Save and Query, Contact Prefs, Statements, Close, Inactive, Do Not Perform Account Balance Calculation, Calculate Now

Figure 15. Insurance tab

New Option on Patients button

There is a new option on the Patients button: Insurance History List. Clicking this button will open the Insurance History screen.

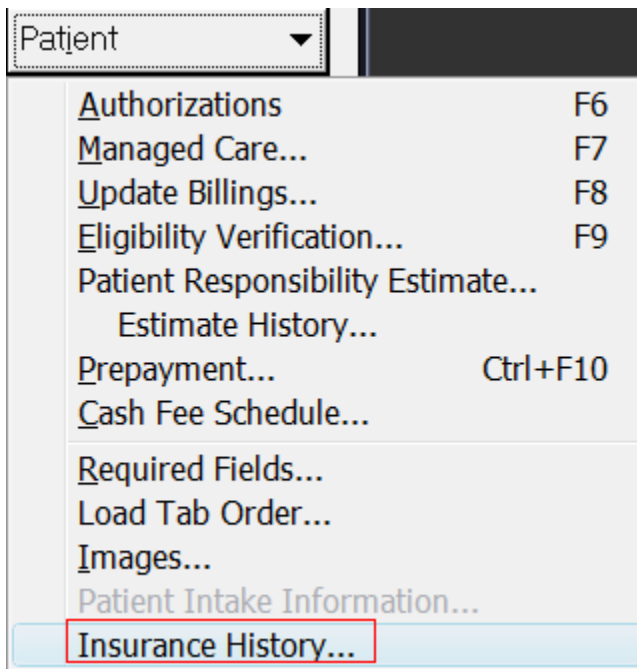


Figure 16. Patient Button Drop-down list

New Insurance History screen

This screen shows you the insurance history for the patient.

Date Added	Priority	Code	Name	Type	Group Number	Group Name	Insured ID No.	Accept Assignment	Effective From	Effective To	Relation t...	Insured	Insur...
10/02/2024	Seco...			Emp...				No	01/01/2024	12/31/2024	Self (18)	0000000100	<Self>
10/02/2024	Primary	NM	Nati...	Emp...			12-345678	Yes	01/01/2023	12/31/2023	Self (18)	0000000100	<Self>
10/02/2024	Tertiary			Emp...				No			Self (18)	0000000100	<Self>
10/02/2024	Seco...			Emp...				No			Self (18)	0000000100	<Self>
10/02/2024	Primary	NM	Nati...	Emp...			12-345678	Yes			Self (18)	0000000100	<Self>

Figure 17. Insurance History List

The table below describes the elements on this screen.

Element	Description
Grid	Displays the insurance companies in which have been added to history.
Delete Item button	Click this button to delete the selected insurance company from the list.

Element	Description
Export List button	Click this button to export the list to review or print.
OK button	Click this button to save the changes you made to the list.
Cancel button	Click this button to cancel any changes and close the screen.

Notes

Note that the columns are sortable but will return to the default sort order by date when you reopen the screen.

You can change the order of the columns and the changes will be saved by user.

Changes made to the Insurance History (additions, deletions) will only be saved to the database when you save the patient's record.

If you select to View Insurance History after adding an insurance to the history but have not yet saved the patient, the lines will be highlighted yellow indicating they have not yet been saved and there will not be a Date Added. Once the patient record is saved, the date added will be updated and yellow highlight removed.

If a record is already in history and Add to history is selected again at a later time, CGM LYTEC checks and, if all the data fields are exactly the same, a message will prompt that it was not added. This is to prevent multiple duplicate lines.

When adding to history, CGM LYTEC will only keep the most recent add per policy tab during one active session (meaning the patient has not been saved in between). For example, if you Add to history and then change the Effective date and Add to history again, when you look in the history grid there will be one line with the most recent values.

Additions and deletions to history are written to the Audit report.

Charges and Payments

New Warning Message

There is a new optional warning message that you will see if you are entering a billing in Charges and Payments with the same Date of Service and Provider as another billing. The system will not prevent you from entering and saving the billing; you will just see the warning when saving the billing. This warning will also appear when saving Pending Transactions.

Duplicates are only checked for Transaction Types that represent charges, not payments.

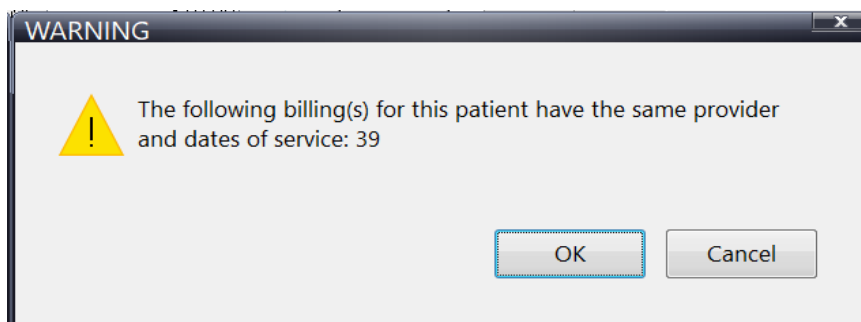


Figure 18. Warning message

Updated Charges and Payments Preferences

New Option

In association with the new Warning message for duplicate Dates of Service, there is a new option in Preferences > Charges and Payments that allows you disable this warning message if you do not want to see it.

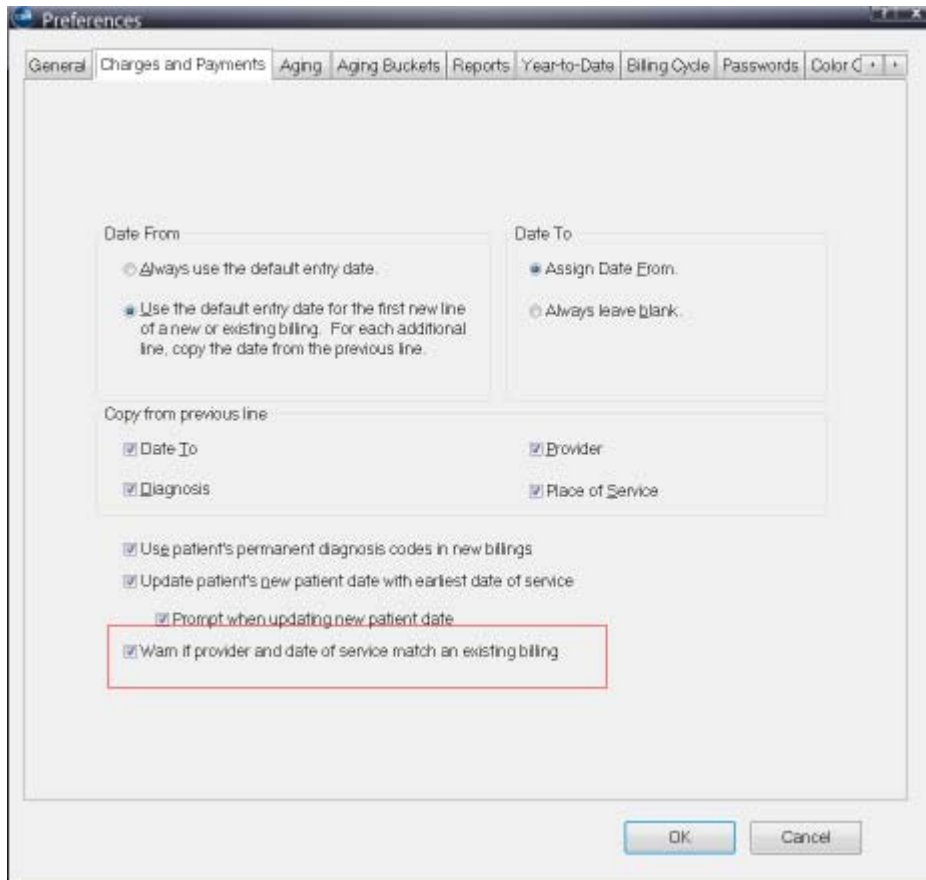


Figure 19. Preferences - Charges and Payments tab

Updated Patient Contact Preferences

The tab for eMEDIX Statement preferences has been updated so you can select check boxes for Statement Delivery methods. The paper option is selected by default.

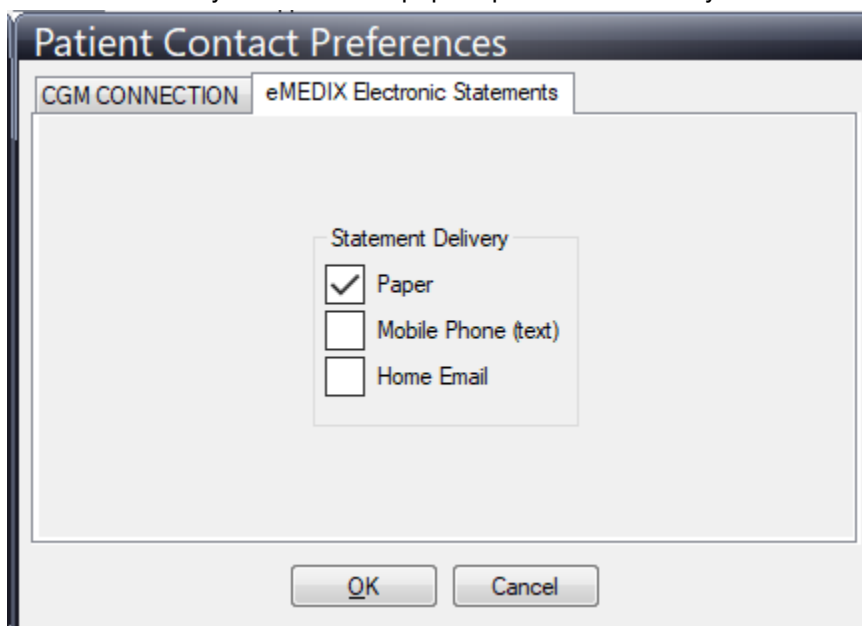


Figure 20. Patient Contact Preferences

The contact preference selected for use by the patient statement formats has been added to the eMEDIX electronic statement custom format which will allow the preference choice to be sent to eMEDIX with each statement produced.

These options allow for you to send statements for one or a combination of these options. For each option checked, a statement will be sent so, if you check all three, a patient will get a statement via paper, a text, and an email.

Updated eMEDIX STATEMENTS/CGM PAY tab in Preferences

There is a new option that allows you to send a paper statement after X number of days when you initially do not send paper statements and statements sent via email or text remain unopened.

The screenshot shows the 'Preferences' window with the 'eMEDIX STATEMENTS / CGM PAY' tab selected. The window is divided into several sections:

- eMEDIX Account:** Includes fields for Webservice User (bopws1), Webservice Password (masked with dots), Submitter ID (PBTX00032), and TPID (BOP).
- CGM PAY:** Includes a 'Time of Day for Recurring Payments' dropdown set to 12:23 PM.
- eMEDIX Statements:**
 - Credit Cards Accepted:** Checkboxes for Visa, Master Card, Discover, and American Express.
 - Shading:** Radio buttons for Black (selected), Blue, Red, and Green.
 - Service Message:** Three numbered text input fields.
 - Statement Messages:** A 'Top:' label followed by five numbered text input fields.
- Days to delay before printing paper statements for unopened text and e-mail statements by patients:** A text input field containing the value '0', which is highlighted with a red rectangular box.

At the bottom right, there are 'OK' and 'Cancel' buttons.

Figure 21. Preferences - eMEDIX STATEMENTS/CGM PAY tab

This Delay Days option only applies If on the Statement Delivery Preference for a patient you did not select Paper. If paper is not selected and you initially send statements via text or email only and it is detected that the email or text has not been opened a paper statement will be sent after this number of days.

The default is 0, meaning you do not want a paper statement sent when sending via text or email even when eMEDIX detects they have not been opened.

Updated eMEDIX Statement form

The form that is sent has been updated.

Statement Preview

Centertown Offices
123 Professional Avenue
Suite 146
Salt Lake City, UT 84124

George F Adams
987 Ferris Steet
Madison WI 93939

Statement Date: 09/12/2024
Account Number: ADAMS0000
Pay This Amount: \$0.00

Show Amount Paid Here: ☐ Mastercard ☐ Discover ☐ Visa ☐ American Express

CC # _____ CVV _____ Expiration ____ / ____

Signature _____

Centertown Offices
123 Professional Avenue
Suite 146
Salt Lake City UT 84124

Please Pay: 0.00 **Account Number: ADAMS0000**

To pay online, scan the QR code or go to: <https://paymentportal.emedixus.com>
and enter the statement ID: BOP-ADZ4SP-FMFES

QR

DATE	DESCRIPTION	INSURANCE	PATIENT
06/09/03	George F Adams Office Visit Level 3	Billing Number: 1 47.00	
08/12/03	George F Adams Hot or cold pack therapy	Billing Number: 3 25.00	
08/12/03	Office Visit Level 3	47.00	
08/13/03	George F Adams Limited Office Visit	Billing Number: 12 47.00	
08/13/03	Electric Stimulation Therapy	30.00	

Figure 22. eMEDIX Statement Preview

The statement ID seen on the preview is only applicable if the practice allows online payments. While It will show on all statements in the preview, since the application does not know which practices allow online payments and which do not. It will not be printed on an actual statement if online patient payments has not been set up.

Task Scheduler

Updated Eligibility Scheduler

The Scheduled Task for Eligibility will now exclude appointments with the following Appointment Status:

- Recall
- Rescheduled
- Canceled

Eligibility requests from the Task Scheduler will not initiate a request for appointments with these status.