



CGM MEDISOFT Release Notes

December 2025

CGM MEDISOFT

Practice Management and EHR

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CGM MEDISOFT v30

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Chapter 1 - Enhancements

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

Windows 10 - End of Support

As of October 14, 2025, Microsoft ended support for Windows 10 (version 22H2) and will no longer provide technical assistance, security updates or feature updates. CGM recommends that you upgrade all your computers currently using Windows 10 to Windows 11.

Prior to Upgrading

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 version 28 and are upgrading to v30, be sure to upgrade to 29 FIRST, register and convert your practice data. Then, from version 29 upgrade to v30.

Note: Acuant is now called IDology. Documentation from earlier releases will still use Acuant.

InteliChart Integration

This feature is for CGM MEDISOFT Network Professional only.

CGM MEDISOFT is now integrated with InteliChart.

Patients can now use InteliChart to schedule appointments with providers in your practice. Patients must be existing patients in your practice to use this online scheduling. InteliChart will show them open appointment slots in the provider's schedule and the patient can select one. That selection will then be passed to your practice and update the provider's schedule. You can also set up certain Reason codes to not allow appointments for that reason to be made online. Additionally, you can select by Provider or Reason to only allow an appointment request, which will be sent only to the Wait List.

When you enable the interface between CGM MEDISOFT and InteliChart, all your Practice information, active non-deceased patients, providers, facilities, appointment reasons and resources will be uploaded to InteliChart. For the provider, CGM MEDISOFT sends the Office phone number. If you want a different phone number, you can change it in the InteliChart setup.

Several updates have been made in CGM MEDISOFT and Office Hours for interfacing with InteliChart.

Updated Provider screen

There is a new check box and field on the Address tab: Online Appointment Slots Limited to. For this option, there is a check box that you can select if you want no limit on the online appointment

slots. If you want a limit, clear the check box and specify the number in the new field. This prevents patients from overbooking an appointment slot.

The screenshot shows a software window titled "Provider: DAVIS, MICHAEL" with tabs for "Address", "Reference", and "Provider IDs". The "Address" tab is active. The form contains the following fields and controls:

- Code: DAVIS, Inactive checkbox (unchecked)
- Last Name: DAVIS
- First Name: MICHAEL
- Middle Name: JONES, Credentials: D.C.
- Street: 692 Coventry Township Lane, Suite A
- City: Marietta, State: GA, Zip Code: 30062
- E-Mail: DAVIS.M@EMDRY.EDU
- Office: (800)333-4747, Fax: (222)222-2222
- Home: (111)111-1111, Cell: (333)333-3333
- Signature On File checkbox (checked), Signature Date: 7/19/2016
- Medicare Participating checkbox (checked), License Number: 12345ABCD
- Online Appointment Slots limited to: Unlimited checkbox (unchecked), spinner control set to 2

On the right side of the window, there are buttons for "Save", "Cancel", "Help", and "Set Default".

Figure 1. Provider - Address tab (CGM MEDISOFT)

This update includes both the Provider screen in CGM MEDISOFT, as well as the one in Office Hours.

Provider: DAVIS, MICHAEL

Address | Reference

Code: **DAVIS** Inactive

Last Name: **DAVIS**

First Name: MICHAEL

Middle Name: JONES Credentials: D.C.

Street: 692 Coventry Township Lane
Suite A

City: Marietta State: GA Zip Code: 30062

E-Mail: DAVIS.M@EMORY.EDU

Office: (800)333-4747 Fax: (222)222-2222

Home: (111)111-1111 Cell: (333)333-3333

Signature On File Signature Date: 7/19/2016

Medicare Participating License Number: 12345ABCD

Online Appointment Slots limited to: Unlimited

Save Cancel Help Set Default

Figure 2. Provider screen - Office Hours

Office Hours Updates for IntelliChart

New Program Option

There is a new option in Program Options: Flash Wait List Notifications. Select this option if you want the Wait List icon in the icon bar to flash when new items are added to the Wait List via IntelliChart appointment request.

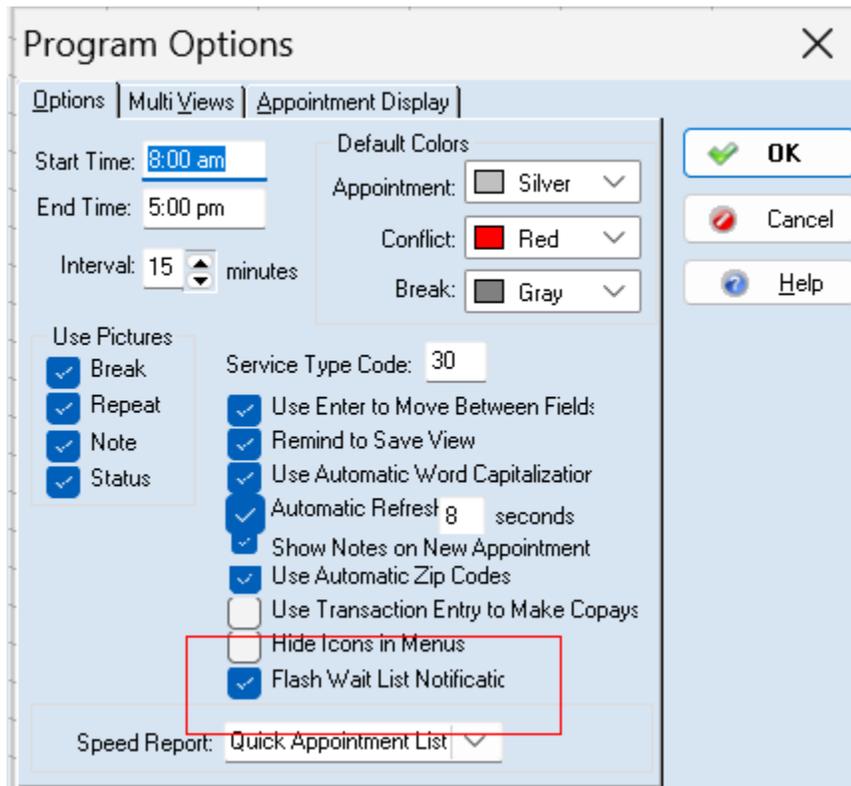


Figure 3. Program Options - General tab

If you have this option enabled, and then you disable it by clearing the check box, you will need to open the Wait list one time after disabling the option. After that, it will not flash when requests come through.

Updated Wait List

There is a new check box on the Wait List: Online Requests. Selecting this check box will filter the list of items appearing in the grid to only show those from IntelliChart.

| Date Created | Date Modified | Source | Name | Provider | Reason | Length | Resource | Facility | Phone 1 | Use |
|--------------|--------------------|--------------|------------------|----------|----------|--------|----------|----------|---------------|-----|
| | 8/18/2025 1:24 pm | | Mommy, Firstcase | DAVIS | | 60 | | | (770)555-1111 | |
| 8/28/2025 | 9/12/2025 11:28 am | IntelliChart | CGM, Five | PLAY | | 15 | | ALP00 | (770)555-1111 | |
| 8/28/2025 | 9/12/2025 11:28 am | IntelliChart | Cgm, Two | PLAY | FOLLOWUP | 30 | | ALP00 | (770)555-1111 | |
| 8/28/2025 | 9/12/2025 11:28 am | IntelliChart | CGM, Four | JM | ROUTINE | 30 | | | (770)555-1111 | |
| 8/28/2025 | 9/12/2025 11:28 am | IntelliChart | Cgm, One | JM | | 15 | | | (770)555-1111 | |
| 8/28/2025 | 9/12/2025 11:28 am | IntelliChart | Cgm, One | PLAY | | 15 | | ALP00 | (770)555-1111 | |
| 9/2/2025 | 9/12/2025 11:28 am | IntelliChart | Cgm, One | DFQ | | 15 | | | (770)555-1111 | |
| 9/2/2025 | 9/12/2025 11:29 am | IntelliChart | CGM, Four | DFQ | CARDIAC | 120 | | | (770)555-1111 | |
| 9/2/2025 | 9/12/2025 11:29 am | IntelliChart | Cgm, One | JM | EXAM | 30 | | | (770)555-1111 | |

Figure 4. Wait List

You can add a column to the grid for Source. This will populate with IntelliChart for appointment requests. To do so,

1. Click the dot in the top left of the grid. The Grid Columns screen opens.
2. Click the **Add Fields** button. The Add Fields screen opens.
3. Highlight Source and click OK.
4. Click OK on the Grid Columns screen.

Add Wait List button to icon bar

Be sure to add the Wait List icon to the icon bar if you are using IntelliChart! To do so:

1. Click the drop-down arrow on the far right of the icon bar.
2. From the drop-down menu, select Add or Remove buttons.
3. Select Customize.
4. Select the Commands tab.
5. Under Categories, click View.
6. Highlight Wait List and drag it to the iconbar.
7. Click Close.

The system will check for any items added to the Wait List periodically and if there are, the Wait List icon will flash to show there are new items. When you check the Wait List, IntelliChart will show in the Source column for the Wait List item. Once you open the Wait List, it will stop flashing until new items come in.

Updated Appointment List

There is a new check box on the Appointment List: Online Appointment. Select this check box if you want to filter the list by online appointments only.

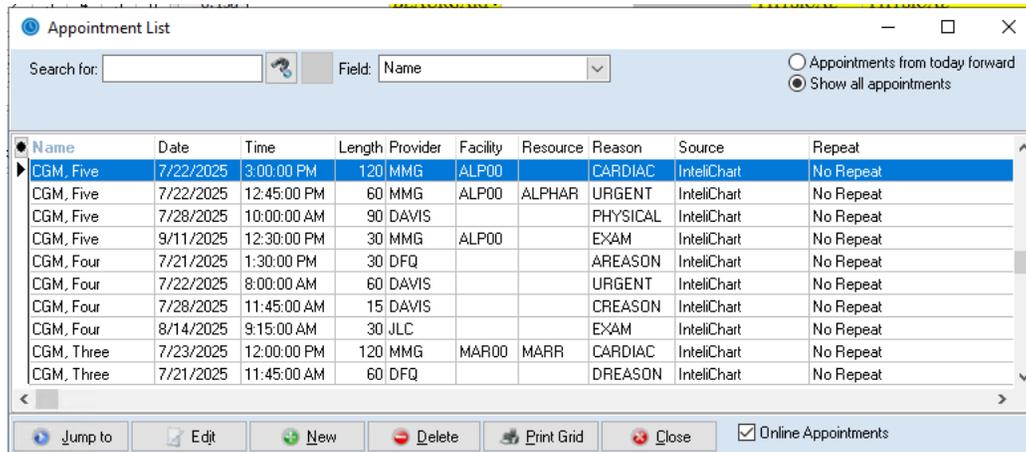


Figure 5. Appointment List

You can add a column to the grid for Source. To do so,

1. Click the dot in the top left of the grid. The Grid Columns screen opens.
2. Click the **Add Fields** button. The Add Fields screen opens.
3. Highlight Source and click OK.
4. Click OK on the Grid Columns screen.

When an appointment is made from IntelliChart and placed on the schedule, the appointment will be populated with the highest number case that the patient has if there is a case. If it has no case, the field will be blank.

Updated Template Entry

New field

There is a new field on the Template Entry screen: Facility. Use this field to specify a facility for the template. The Lookup will show all facilities, active or inactive.

You can also right-click on the field to add a new facility or edit an existing one.

Figure 6. Template Entry

Reason Codes

You can now save the template with no Reason Code. Previously, at least one Reason Code was required.

Updated Multi-View

New View Option for Facility.

There is a new option on this screen: Facility. Select this option if you want a column for a facility in a Multi-View. When you select Facility, all facilities will be listed in the grid. Select the one you want.

| Code | Name |
|-------|--------------------------|
| DES00 | Desert Valley Hospital |
| DES01 | Desert Diamond Labs |
| J0000 | J. Duckworth Mallard and |
| MES00 | Mesa Community Hospital |
| NEW01 | New Age Medical Laborat |

Figure 7. Add/Change Column screen

Updated Edit View screen

You can now select Facility on the Type drop-down in the Edit View screen.

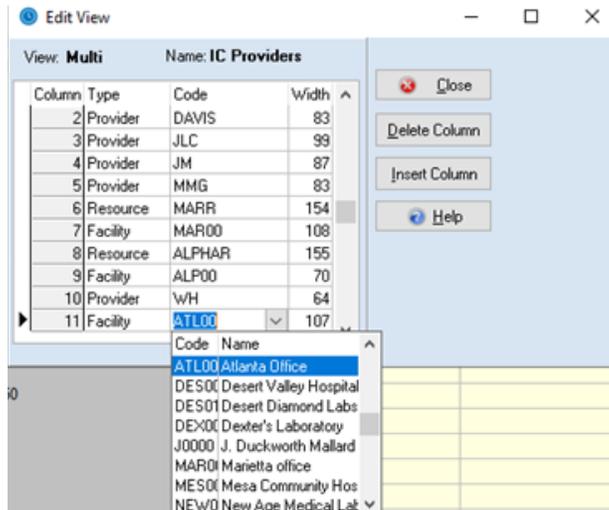


Figure 8. Edit View screen

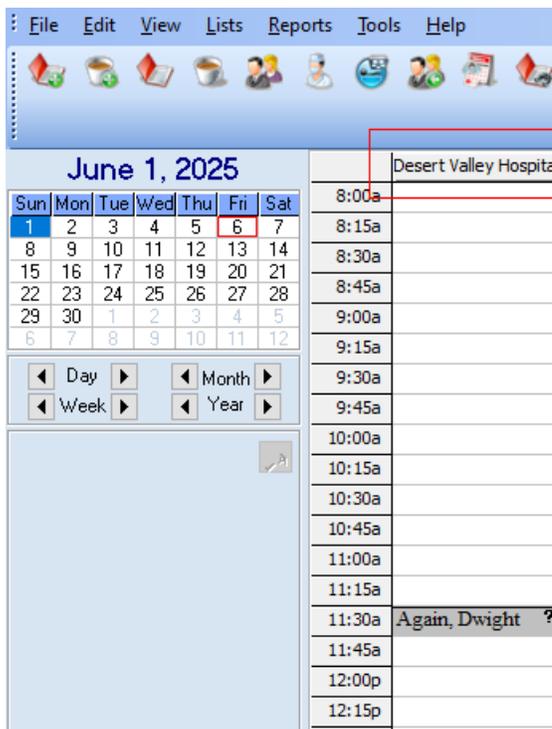


Figure 9. Office Hours Facility view

Updated Informational tab on left

The Left panel now shows up to three Templates when you select a template spot in the Appointment grid when you have overlapping templates for that slot.

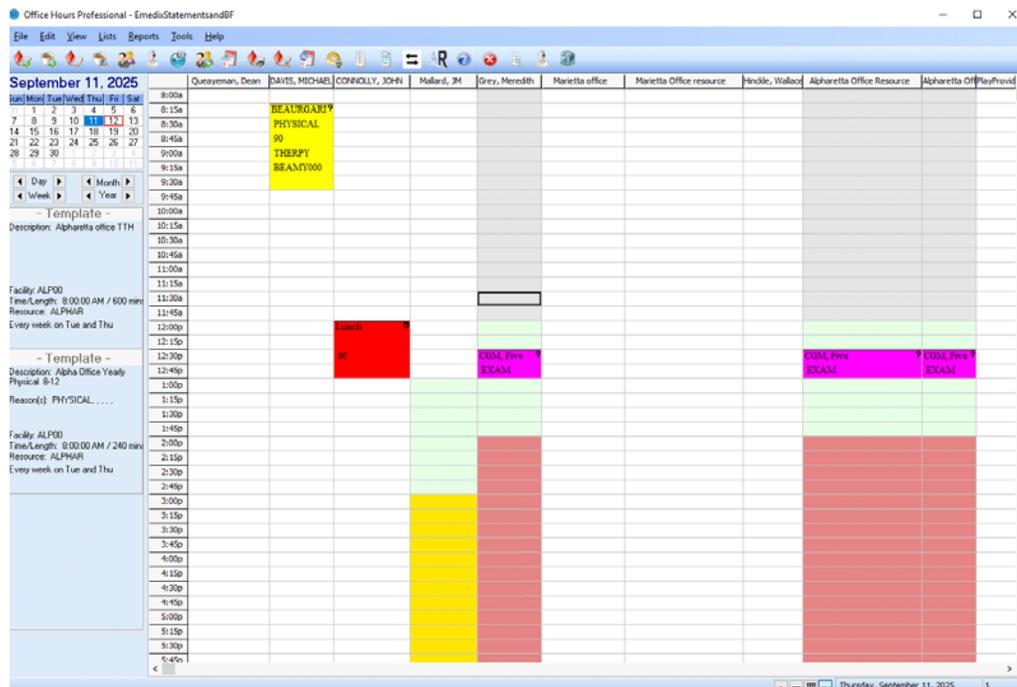


Figure 10. Appointment grid

Updated Appointment Field Population

The following rules apply:

- When a Provider is in context (day/week/month views) or in Multi View on Provider columns and there are overlapping templates and user just double-clicks on a slot or right-clicks and select a new appointment, a new appointment will open with the Provider and the Facility/ Resource and Reason populated in the **first** template shown at top of left panel. In the past, it randomly selected one.
- If user just single clicks on a slot and then clicks on a template on the left, the new appointment will open with the Provider/ Resource/Facility and Reason from that template so the user can control what gets populated.
- If in Multi-view and in a Resource or Facility column, it will only populate the Reason and either Facility or Resource depending on the column you are in. This is the same functionality that resource has always had and the same now applies to facility column.

Screen Change

You may notice additional spacing between the Facility field and the Repeat section on the New Appointment Entry screen. There has been no change to functionality or tab order. There were new fields added for future use that are hidden in this version.

Figure 11. New Appointment Entry screen

InteliChart Setup within CGM MEDISOFT

To set up the connection with InteliChart and send information there is a new option:

Updated Interface Configuration menu

New Option

There is a new option on the Interface Configuration menu: IntelliChart. Select this option to open the IntelliChart Interface Configuration screen.

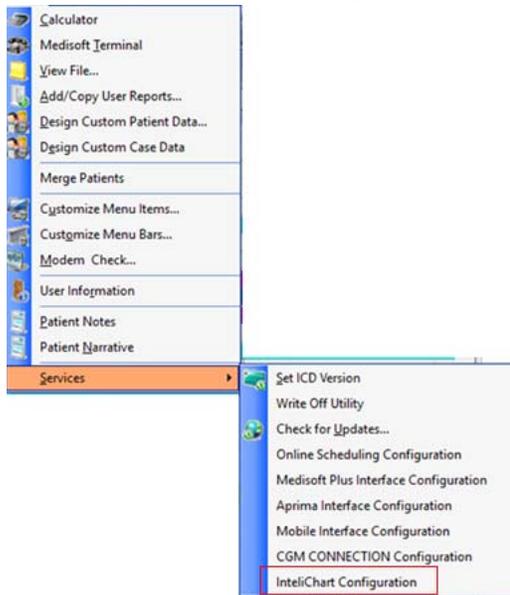


Figure 12. Interface Configuration menu

New IntelliChart Interface Configuration screen

Use this screen to enable the connection between your practice and IntelliChart.

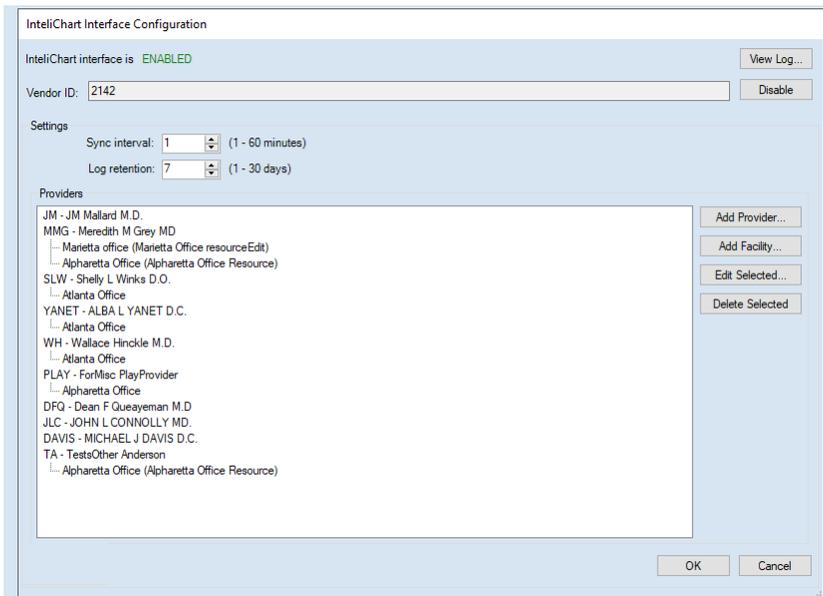


Figure 13. IntelliChart Interface Configuration screen

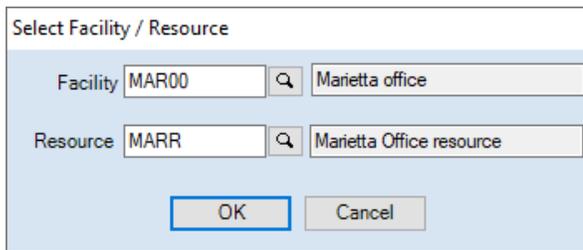


Figure 14. Select Facility/Resource screen

The system needs to know which providers and location options to show when the patient searches for appointments. In this screen you will enter the combinations to send to IntelliChart.

You will add a provider for each one who will be using online scheduling.

If you have only one location, all you will add is each provider. The system will use your practice Information for location.

If you have multiple locations, you will add a provider and, with that provider highlighted, then select Add Facility and select the first facility for that provider.

You must add your main practice into the Facility list so it can be selected here.

Once the patient selects the provider/facility combination and the appointment is scheduled, if you want the appointment to be populated with a designated resource, you can also select that here.

Important Note: If you use the CGM MEDISOFT to Aprima interface AND have Aprima Interface configuration setting set to 'Append Resource ID to Aprima Calendar ID' checked, you **must** include a Resource in this setup. If you do not do that, the appointment that comes back in to CGM MEDISOFT Office hours will not have the resource populated; and when the appointment is sent to Aprima it will not get on to the correct Aprima Calendar.

The table below describes the elements on this screen:

| Element | Description |
|-----------------------|---|
| View Log button | Click this button to view the service Log. |
| Enable/Disable button | Click this button to enable the interface. <hr/> Note: you must select at least one provider first! |
| Settings section | |
| Sync Interval | Enter the number of minutes for the sync interval. |
| Log Retention | Enter the number of days you want to retain the log data. |
| Providers section | |
| Add Provider button | Click this button to add a provider. <hr/> Note: You must add providers in the IntelliChart Admin Portal as well. |

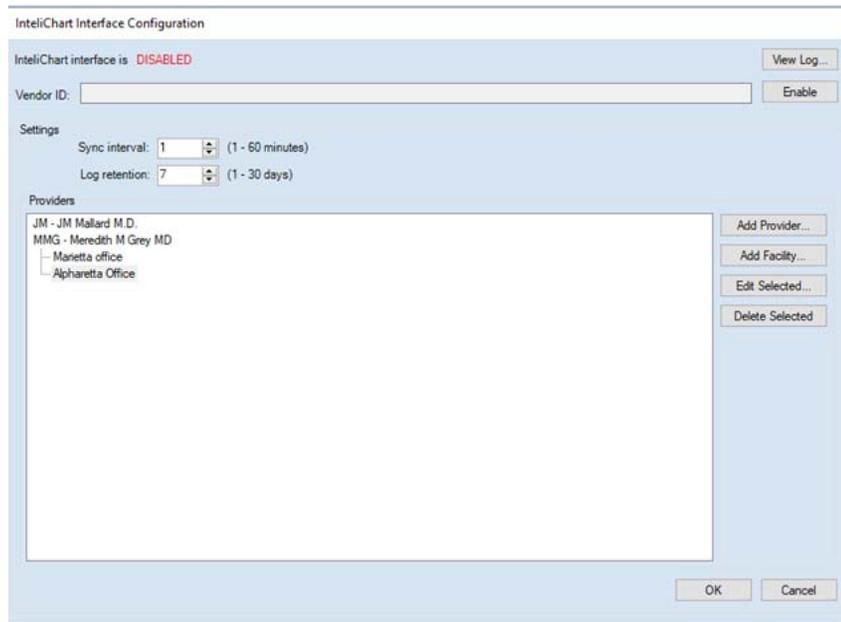
| Element | Description |
|-----------------|---|
| Add Facility | Click this button to add a facility. You will be able to select both a facility and resource. |
| Edit Selected | Click this button to edit the item highlighted in the box to the left. |
| Delete Selected | Click this button to delete the item highlighted in the box to the left. Once a provider is removed from here, you will also need to deactivate them in IntelliChart. If a removed provider is not deactivated in IntelliChart, the customer will continue to be billed. (More information on this will be provided when you have your IntelliChart training) |
| OK | Click this button to save changes. |
| Cancel | Click this button to close the screen without saving any changes. |

Enabling the Interface

Once IntelliChart has your account set up, use these steps to enable the IntelliChart interface:

1. On the Tools menu, select Services and then Interface Configuration and then IntelliChart. The IntelliChart Interface Configuration screen opens.
2. Specify a Sync Interval and Log Retention time.
3. Click Add Provider. Select a provider and click OK.
 - a. If you have multiple facilities, with Provider highlighted, select Add Facility and select a facility (and resource if desired or required)
 - b. If this provider has another facility for scheduling, repeat this process to add the next facility.
4. Repeat for all providers.

5. Click the **Enable** button. The Enable IntelliChart Interface screen opens.



6. Enter the Vendor ID. The Vendor ID will be provided after IntelliChart completes and implements the order.

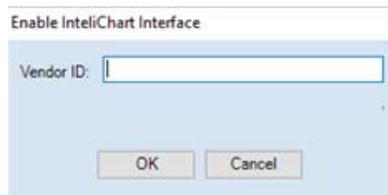


Figure 15. Enable IntelliChart Interface screen

7. Click **OK**.

At this point, CGM MEDISOFT will start synchronizing all needed data over to IntelliChart. The amount of time it takes will depend on the size of your data. We suggest doing this at a time where you will not need use of the system.

Template Setup

What you need to know before allowing patients to schedule using IntelliChart.

If you do not have multiple facilities

- You do not need to make any changes to templates.
- When you are not using facilities in templates, **blank slots are bookable and will show as available (You will need to setup Breaks to block out any non bookable days or times)**

If you do have multiple facilities that you will allow scheduling for IntelliChart

- When you have multiple facilities, the system will only query for open slots in a template with that facility. **Any blank slots on your calendar that do not have a template with a facility will not be looked at as a bookable slot.**
- If you want to block out lunch or any other time that has a template, you will still use breaks on top of any template slots so they are not bookable. However, you will not need to block out any days/times that do not have a template (ex. Weekends) since non template slots are not bookable.

If you do not use templates, now for Reasons:

Example:

If you have a main office and 1 satellite office.

For patient appointments

Providers A and B are in the main office Monday and Wednesday 8am-6pm

Provider A is in Satellite office B Tuesday 8-12

Provider A is in Satellite office Thur 1-6

Provider B is in Satellite office B Tuesday 12-6

Fridays for Provider A and B are for surgery that patients do not book appointments online for

Provider A Tues. pm Surgery

Provider B Thurs am surgery

Templates needed for Provider A

1. No reason.
Suggested Description Provider A 'Main Office' all day,
Provider code A,
Resource (not needed unless you use Aprima with resource for your offices – see note)
Facility – you must select a facility code for your main office,
Length 600,
Repeat Weekly MW with end date in future
2. No reason.
Suggested Description Provider A 'Office B Tues. 8-12,
Provider code A,
Resource (not needed unless you use Aprima with resource for your offices – see note)
Facility – Office B facility code,
Length 240,
Repeat Weekly T with end date in future
3. No reason
Suggested Description Provider A 'Office B Thurs. 1-6,
Provider code A,
Resource (not needed unless you use Aprima with resource for your offices – see note)
Facility – Office B facility code,
Length 240,

Repeat Weekly Thurs. with end date in future

Templates for Provider B

Repeat options examples from Provider A 1 and 2 above with changes as needed for Provider B, dates/times etc.

If you currently use templates and you have multiple facilities where you will allow patients to make online appointments:

- You will create an all day template with no reason as described above for the facility.
- You will edit any existing template with reasons to include the facility.

If your existing template with reasons covers the entire day, you can just edit that to include the facility.

InteliChart Setup and Use--Web Portal

These instructions are subject to change based on updates and enhancements made by InteliChart.

Basic Setup

1. Enable the interface and let it sync (see [“New InteliChart Interface Configuration screen” on page 11](#)).
2. Log in to InteliChart. Your practice should be there.



Figure 16. List of Practices

3. Select Enterprise level.
4. Select User Administration in the left panel,
5. Select Roles.

- Highlight Enterprise Admin in the center panel and select Share this role with all practices in the right panel.

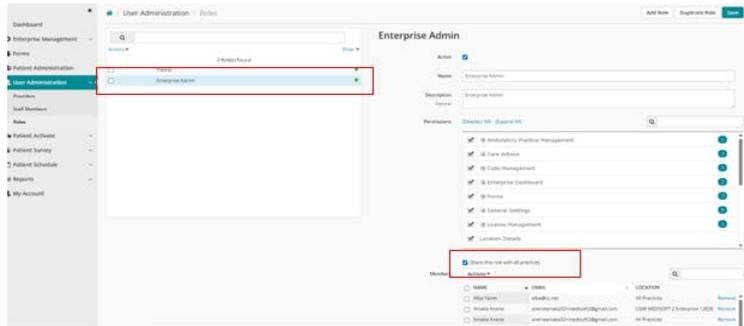


Figure 17. Enterprise Admin screen

- Switch to practice level.
- Select User administration > Providers, and click Add Provider.

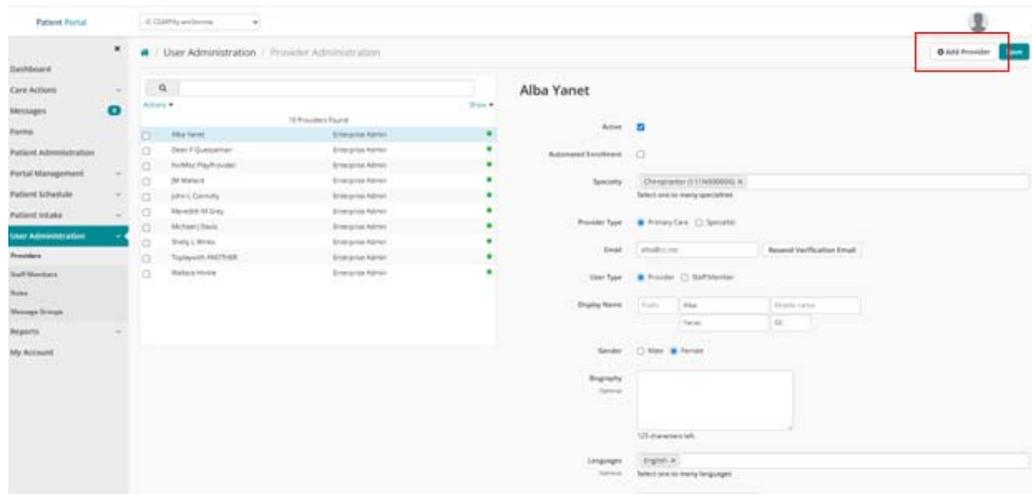


Figure 18. Add Provider

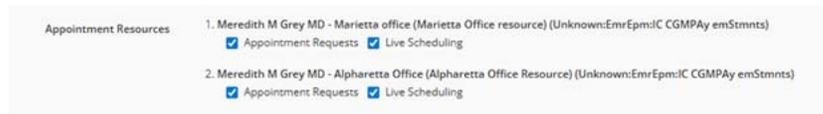
- Complete these fields:
 - Specialty
 - Email--click send manually,
 - Display name: put in provider first name, last name, credentials.
 - Pick gender, languages, phone.
 - Associated facility--pick All Practices/Facilities, and then Enterprise admin.
 - Default facility--select your practice name, then practice name again (or a facility).

- Associated Users--move this provider to right pane.



- Appointment Resources--You should see all the provider/resource/facilities from the mapping in the Configuration screen.

Check Appointment Requests and or Live Scheduling as applicable for this provider.

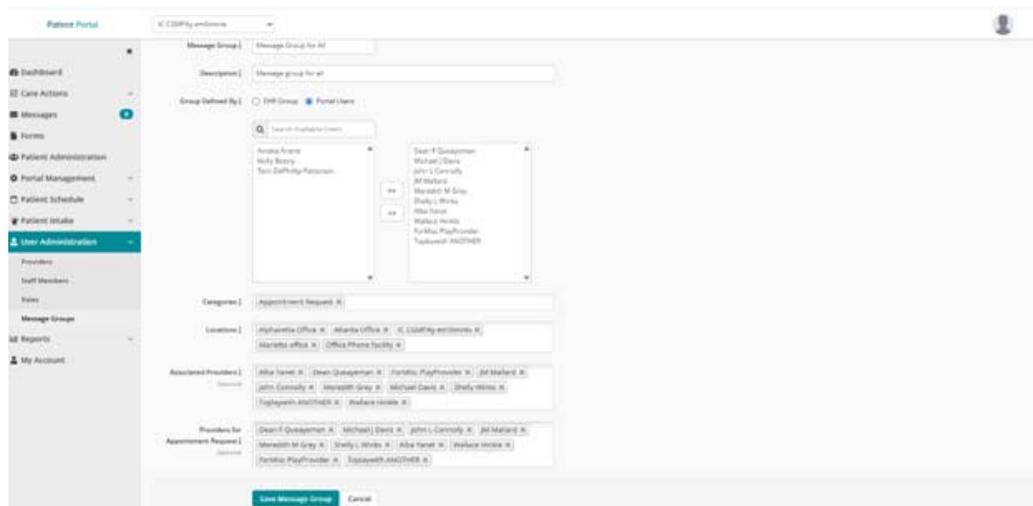


- Accepting new pts--set to No.
- Permissions - Select All.

10. Save the record.

Set up Message Groups

1. Go to User Administration > Message groups,



2. Click Add New Message Group.
3. Complete these fields:
 - a. Give it a name, description.
 - b. Select Portal User.

- c. Highlight a provider in the left grid and click the arrow to add the provider to the right pane.
 - d. Categories: appointment request.
 - e. Location: Select all practices and all facilities that are there.
 - f. Associated Provider: select the provider you just added and do the same for Provider for Appointment requests.
4. Save the record.

Verify Message Groups in Provider

1. Return to User Administration > Providers.
2. Select your first provider and scroll down to Message group and verify it now has this message group.

You can come back to this after adding all the remaining providers.

Adding more Providers

1. Add the next Provider and repeat steps for that provider. Add all providers and then go back and edit the message groups.

Setting Up Appointment Types/Reason

1. Select Patient schedule from the left panel.
2. Select Settings > appointment type tab.

| FROM TIME | PATIENT FRIENDLY TERM | APPOINTMENT INSTRUCTIONS | SLOT BASED LIVE SCHEDULING | GENERIC REQUEST | NONE | ACTIONS |
|------------------------------|-----------------------|--------------------------|-------------------------------------|----------------------------------|----------------------------------|---------|
| 1 Reason E | | | <input checked="" type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| 2 CARDAC | | | <input checked="" type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| 3 Check list | | | <input checked="" type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| 4 Reason C | | | <input checked="" type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| 5 Reason D | | | <input checked="" type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| 6 Scan | | | <input checked="" type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| 7 Existing Patient | | | <input checked="" type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| 8 Follow Up Visit | | | <input checked="" type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| 9 Wearable Device | | | <input checked="" type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| 10 New Patient | | | <input type="checkbox"/> | <input type="radio"/> | <input checked="" type="radio"/> | |
| 11 Office Visit | | | <input checked="" type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| 12 New Physical | | | <input checked="" type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| 13 bring reason added in app | PHYS | | <input type="checkbox"/> | <input checked="" type="radio"/> | <input type="radio"/> | |

- a. Check all applicable for Slot Based Live Scheduling.
- b. If any are only for Generic Request or None, select as appropriate.
- c. Add a Patient Friendly Term for any reasons/appointment types which need to be clarified or changed. The left column are the types that are from CGM MEDISOFT. If you want to display them differently to the patient, add a Patient Friendly Term and that is what will be displayed.

Setup Location Display and Time Zone

Portal management Locations

You can change any location information if you want to display it differently from what was sent over from CGM MEDISOFT.

Select time zone and daylight saving time options as applicable.

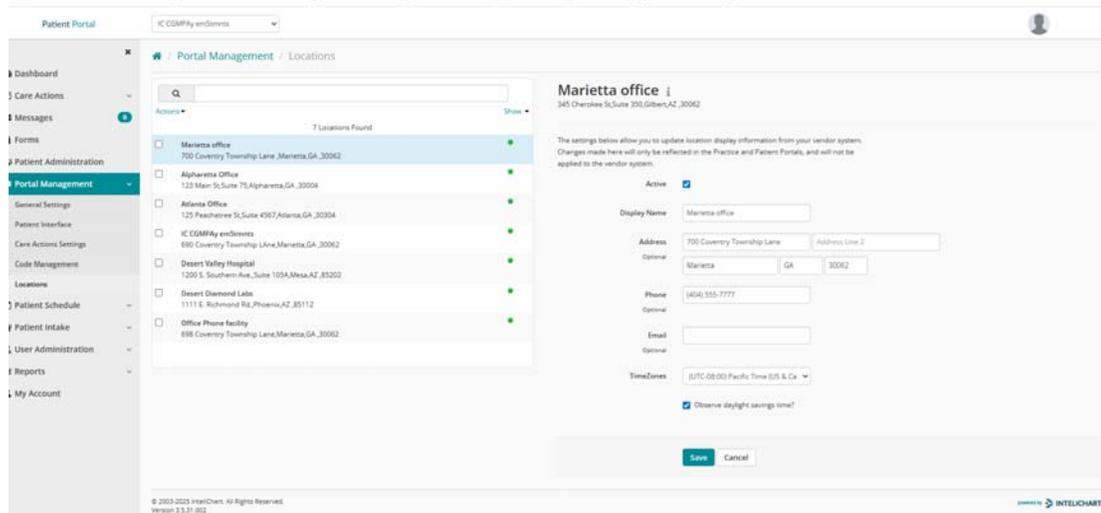


Figure 19. Portal Management

Other Setup

1. Select Patient Administration from the left panel.
2. Search for a patient to verify one is there from the sync.
3. Select Portal Management from the left panel.
4. Select Care Action Settings and then the Appts tab.
5. Select the Manage Appts through Care Actions check box and the Send to PM System check boxes.

Finding the Web address to send to the patient

These URLs are only available once all IntelliChart setup has been completed.

1. Log out and back in.
2. Select Patient schedule > Settings
3. Look for URLs at each level. (There may be a 10-15 minute delay before they all show up.)
4. In the Admin Portal, at Enterprise level in the drop-down, select on the Patient Schedule on the left.

5. Select Settings. The Schedule Settings page opens.

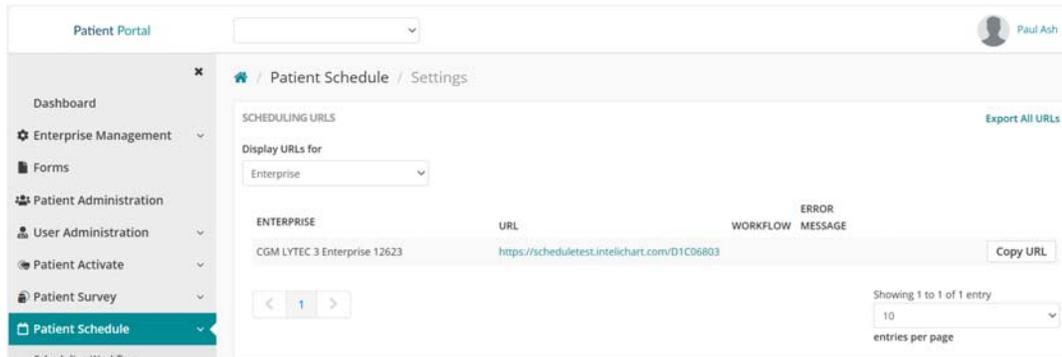


Figure 20. Schedule Settings page

6. Here you have three options depending on whether or not the patient will make an appointment by Enterprise, Location, or Provider.

- Enterprise will display all providers and locations.
- Location displays all the providers in that location.

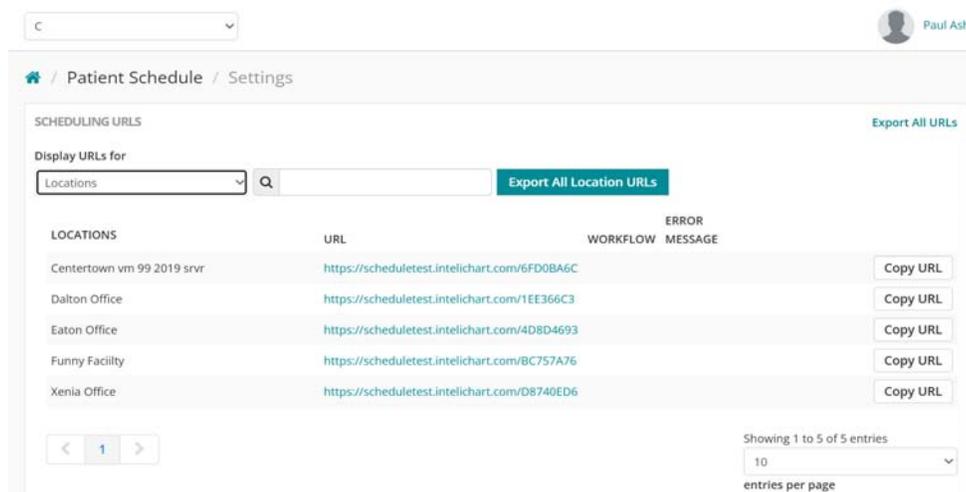


Figure 21. URLs by Location

- Provider displays that provider and locations they go to.

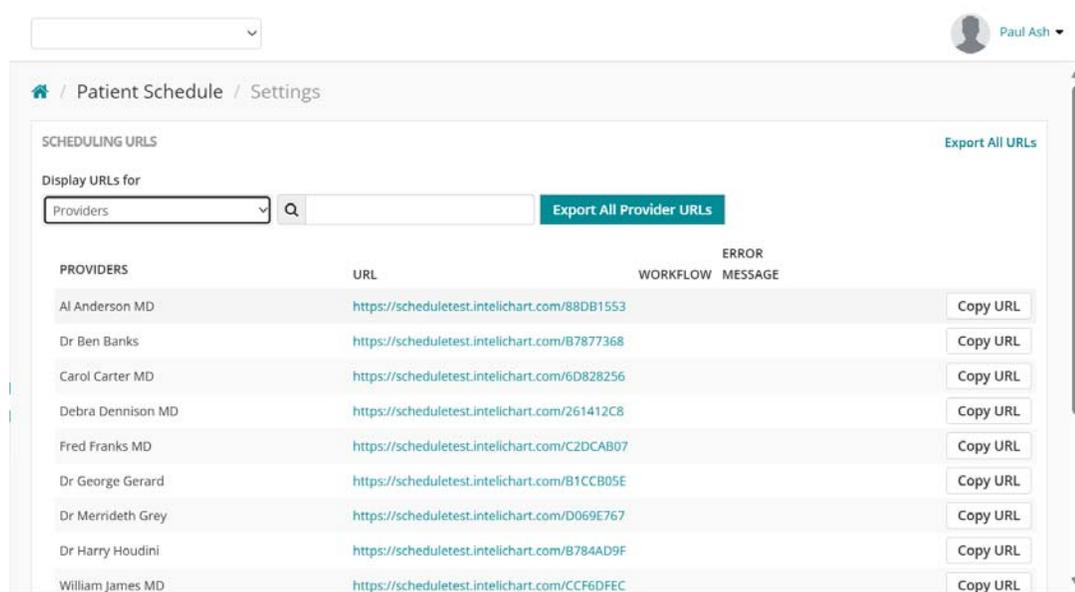


Figure 22. URLs by Provider

Sample steps for a patient making an appointment by provider

The patient will be sent the URL for the provider. You may provide the patient with the appropriate URL via email or convert that URL to a QR code to provide to the patient in an email or printed.

1. The patient will launch the URL.

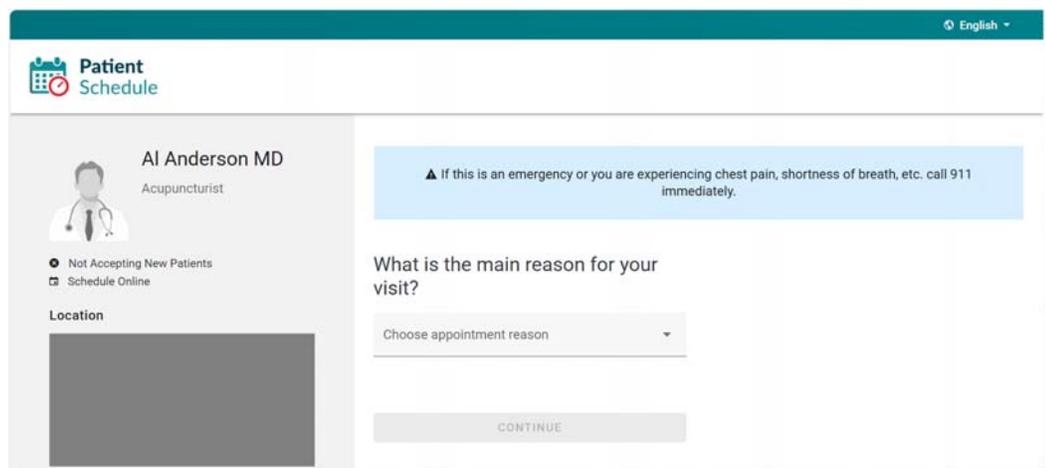


Figure 23. Patient Schedule by Provider

2. Next, the patient will select an appointment reason and click Continue.
3. Available appointment slots will be displayed and the patient will select a time and then fill out their identifying information

Once IntelliChart identifies the patient, the patient can submit the appointment and it will display on the Office Hours schedule.

InteliChart Licensing

InteliChart is gated by provider across all practices in one database. For example, if there are 3 practices and in each practice 3 providers wish to use online scheduling, you must purchase 9 licenses.

When you are adding providers in the InteliChart configuration screen, you will receive a message and will be prevented from adding if you try to add more than you have purchased.

You could remove one provider and add a different one or purchase additional licenses.

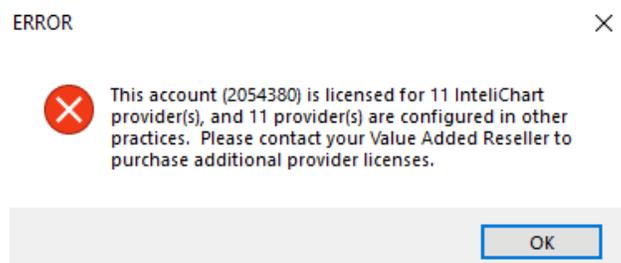


Figure 24. Error message

If at renewal time you reduce the licenses you purchase and have not removed the additional providers in your configuration screen, you will receive a warning upon every login. You need to purchase additional licenses or remove the required number of providers to match what you have. Once you receive this message, you have two more days to get new licenses or remove the required number of providers. If you do not, the interface will be disabled at midnight on the 3rd day.

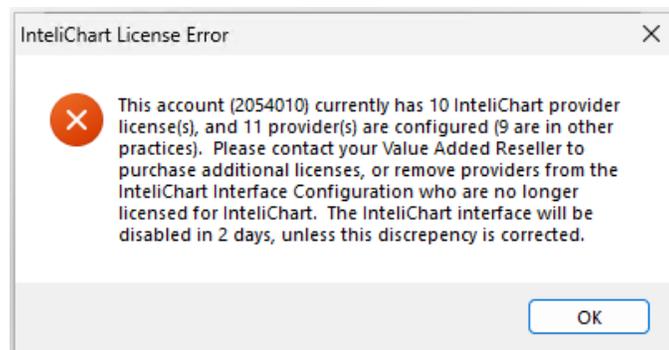


Figure 25. InteliChart License Error

Once remedied you will need to re-enable the interface and in InteliChart, you need to check each provider to make sure they are still checked for Live scheduling.

Important!! If you choose to not use online scheduling for some providers, **you must also deactivate them in InteliChart in addition to removing them from the configuration screen or YOU WILL BE CHARGED.**

Mediutils

Updated Copy Data Tables

When you copy data table OHAPP, the copy will also include the Facility field in the appointment and the template and the Source field. It will also include the new Check box and field for Online appointment limit in the Provider.

Updated Import/Export

When you perform and import or export of data, the Facility field in the appointment and template will be included. It will also include the new Check box and field for Online appointment limit in the Provider.

Chapter 2 - Resolved Issues

Below are a list of issues that were resolved with this release.

Resolved Issues

The following issues were resolved with CGM MEDISOFT v30.

| PBI | Application | Description |
|----------------------|-----------------------------|---|
| 84035018 4/188779 | CGM MEDISOFT | <p>You can now change the Case Description.</p> <p><u>Steps to recreate</u></p> <ol style="list-style-type: none"> 1. Open CGM MEDISOFT. 2. Add an alert to the patient's record 3. Open a case and attempt to change the Description. 4. Verify that it works properly. |
| 00797784/ 113896 | Office Hours | <p>The Appointment List in Office Hours will now show the correct user who last modified an appointment.</p> <p><u>Steps to recreate</u></p> <ol style="list-style-type: none"> 1. Open Office Hours and create an appointment. 2. Save the appointment. Close Office Hours. 3. Launch Office Hours as another user and modify the appointment and Save. 4. Open the Appointment List and verify that the Modified User column shows the last user to modify the appointment. |
| 198215 | Office Hours/CGM CONNECTION | <p>You will no longer receive an error accessing CGM CONNECTION Preferences from Office Hours.</p> <p><u>Steps to recreate</u></p> <ol style="list-style-type: none"> 1. Open Office Hours. 2. Right-click an appointment and select Edit. 3. Click the CGM CONNECTION button and verify that the preferences open without error. |

