UPGRADE MATRIX

New Features	Added from 2016*-2020*	2021*	2022*	2023	2024
Fully integrated patient statements using eMEDIX					✓
More detailed eligibility display					✓
Patient responsibility estimate for better service at the point of care					✓
Daily appointment and activity review					✓
Microsoft Windows Server 2022 support					✓
Auto-creation of pending transactions from completed appointments				✓	✓
Ability to make appointment resources inactive				✓	✓
Ability to add saved notes to payments and statements				✓	✓

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** Priced separately.

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	Added from 2016*-2020*	2021*	2022*	2023	2024
Current co-pay, co-insurance, and remaining deductible displays when using eMEDIX** EDI				✓	✓
Opt-in contact preferences for patients using CGM CONNECTION** appointment reminders				✓	✓
Reporting for all payments matching Date of Service (DOS)			✓	✓	✓
Financial KPI dashboard to display financial performance year-over-year for charges, adjustments, and payments			✓	✓	✓
Patient encounters KPI dashboard to display patient visits, missed appointments, and average charges per visit			✓	✓	✓
New workflow to prevent printing and export of inactive items and patients			✓	✓	✓
Integration with CGM CONNECTION** - a robust patient engagement tool			✓	✓	✓
Enhanced password security			✓	✓	✓
Report enhancements to meet 21st Century Cures Act demographic requirements			✓	✓	✓
OCR scanning of insurance cards and return of demographic information		✓	✓	✓	✓
Enhanced ICD-10 search tool powered by IMO® Terminology		✓	✓	✓	✓
Demographic information returned on eligibility checks		✓	✓	✓	✓
Multiple revenue management improvements related to batch eligibility checks		✓	✓	✓	✓
Fewer clicks for real-time eligibility checks		✓	✓	✓	✓
SQL version installation of your choice		✓	✓	✓	✓

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	Added from 2016*-2020*	2021*	2022*	2023	2024
SQL server FileStream enabled to help reduce database size of scanned images		✓	✓	✓	✓
Accept up to 12 diagnosis codes transferred from EHR (up to six from CGM PRACTICE PARTNER)		✓	✓	✓	✓
Create AR tracker notes directly from Charges & Payments screen		✓	✓	✓	✓
Assign agent, task, and due date from Charges & Payments screen		✓	✓	✓	✓
Custom color coding for quick identification of patient types in patient lookup grids		✓	✓	✓	✓
EHR interface with the award-winning CGM APRIMA** solution		✓	✓	✓	✓
Duplex scanning capability and full-page scans viewing	✓	✓	✓	✓	✓
Timely filing and appointment date filters in AR Tracker	✓	✓	✓	✓	✓
Enhanced eligibility response displays	✓	✓	✓	✓	✓
Patient balance field on custom displayed and printed appointment schedule	✓	✓	✓	✓	✓
Filters and enhancements to Patient Connect	✓	✓	✓	✓	✓
Charge entry messaging capabilities adding missing data test parameters	✓	✓	✓	✓	✓
Mobile app enhancements: permanent diagnosis for patient preview, edit appts, add'l insurance info, middle initials, facility codes	✓	✓	✓	✓	✓
Support for insurance payments by credit card	✓	✓	✓	✓	✓
Ability to default NDC codes in charges and payments	✓	✓	✓	✓	✓

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	Added from 2016*-2020*	2021*	2022*	2023	2024
Upgraded crystal reports	✓	✓	✓	✓	✓
Patient Intake tool added to CGM LYTEC Mobile	✓	✓	✓	✓	✓
Accounts Receivable Tracker for working AR balances	✓	✓	✓	✓	✓
Expanded functionality in CGM LYTEC Mobile	✓	✓	✓	✓	✓
Enhancements to real-time eligibility and EOB functionality	✓	✓	✓	✓	✓
Customizable coding edits	✓	✓	✓	✓	✓
Claim status verification with electronic response from clearinghouse	✓	✓	✓	✓	✓
Move credits workflow	✓	✓	✓	✓	✓
Customized printable appointment schedules	✓	✓	✓	✓	✓
Insurance timely filing calculator	✓	✓	✓	✓	✓
Advanced duplicate patient record matching	✓	✓	✓	✓	✓

Contact your representative to learn more

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