



# Release Notes--Service Pack 10.1.3201

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March 2026

**CGM eMDs**

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EHR and Practice Management

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# Chapter 1 - Enhancements

This document provides summary information about new features and resolved issues. Please take a few minutes to review the document in its entirety.

## Windows 10 -- End of Support

As of October 14, 2025, Microsoft ended support for Windows 10. CGM recommends that you update your computers from Windows 10 to Windows 11.

### \*\*\*Important Step Needed For Installation\*\*\*

When updating applications on your Utility Service machine, you will need to completely uninstall CGM eMDs and then re-install the new application version. Not doing this will cause CGM eMDs services to stop and will result in loss of functionality.

## Required for this release

### SQL Server 2016

You must be running SQL Server 2016 or newer to install this service pack.

### In this chapter

Topic	See page
<a href="#">New Features and Enhancements</a>	1
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# New Features and Enhancements

The new features and enhancements in this release are briefly described below.

## Demographics

### Updated Minimum Applicable Standard codes for Race and Ethnicity

The version of the minimum applicable standard codes for Race and Ethnicity is now compliant with USCDI v3 guidelines.

### **Updated C-CDA: Tribal Affiliation**

Tribal Affiliation data is now part of the C-CDA reporting using C-CDA R2 Standards. In this way, CGM eMDs supports the newest USCDI V3 Tribal Affiliation standard and meets interoperability requirements.

### **Updated C-CDA: Health Insurance Information**

In addition, Health Insurance information is now stored and added to the C-CDA so that CGM eMDs supports USCDI V3 Health Insurance standards.

### **Updated C-CDA for Date of Death**

Date of Death data is now stored for C-CDA reporting using C-CDA R2 Standards, enabling CGM eMDs to support the USCDI V3 Date of Death standard and promote interoperability.

If a Date of Death appears in the patient record, it will be reported on the C-CDA.

### **Updated Demographics**

You can now select a Tribal Affiliation that patients associate with, within the United States.

### Updated General tab of Patient Demographics

There is a new field on the General tab: US Tribes. Clicking the lookup for this field will open the new Select US Tribes window.

The screenshot shows the 'General' tab of the patient demographics form for 'Sammy Sesame'. The 'US Tribe(s)' field is highlighted with a red box. Below the form is an insurance table with the following data:

Assign	Insurance Company	Type	IC Code	Group No	Policy Number	Policy Holder	Copay	Date Terminate
1	Blue Cross and Blue Shield	CI	BL	000010	CFG39728763601	Sesame, Sammy	\$20.00	
2	Humana	CI	CI	389798792	397287636	Sesame, Sammy	\$0.00	12/31/2002

Figure 1. Patient Demographics - General tab

## New Select Tribes window

Use this window to select which US Tribes the patient belongs to.

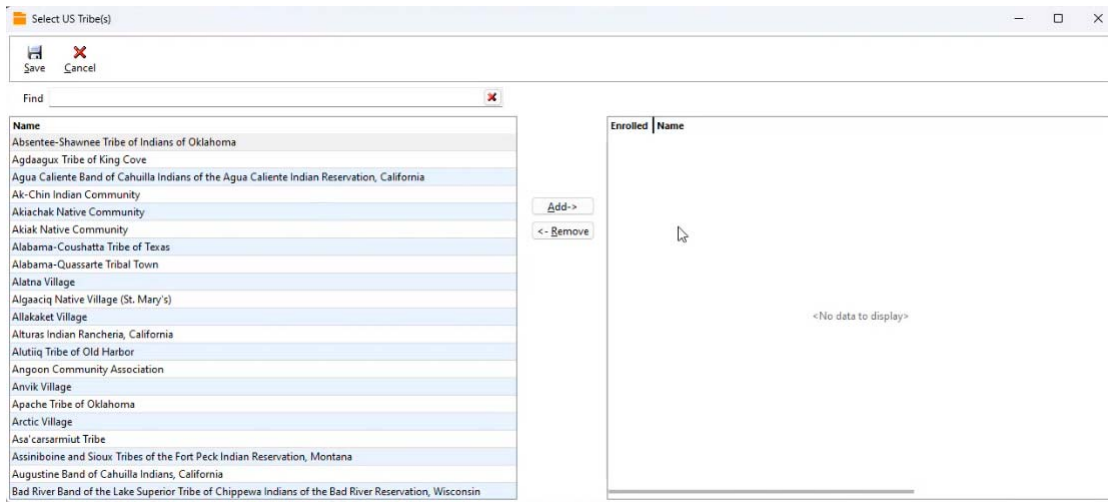


Figure 2. Select Tribes window

The table below describes the elements of this window.

Element	Description
Save button	Click this button to save the changes.
Cancel button	Click this button to close the window without saving changes.
Find	Use this field to search for a particular tribe.
<b>Grid</b>	
Name section	Shows you the list of tribes
Add button	Click this button to add the selected tribe to the Name section.
Remove button	Click this button to remove the selected tribe from the selected Name section.
Enrolled check box	Select this check box if the patient is enrolled in that tribe.
Selected Name section	Shows you the currently selected tribes for the patient.

### Contact Type Required Field

Recording of patient contacts on the Contacts tab of Demographics now requires users to select a Contact Type. This will appear on CCDAs and help define the contact for interoperability standards.

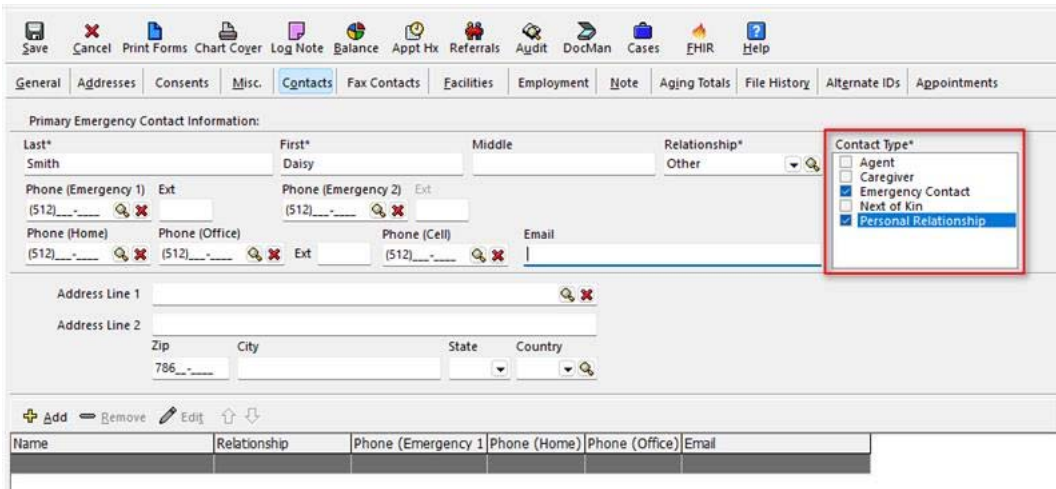


Figure 3. Patient Demographics - Contacts tab

### Updated Employment tab of Patient Demographics

#### New fields

There are two new fields on the Employment tab: Usual Occupation Classification and Usual Occupation Industry. Use these to specify the patient’s usual occupation. Usual occupation allows for documentation described as the employment the patient would normally have, instead of current occupation, which may or may not be different.

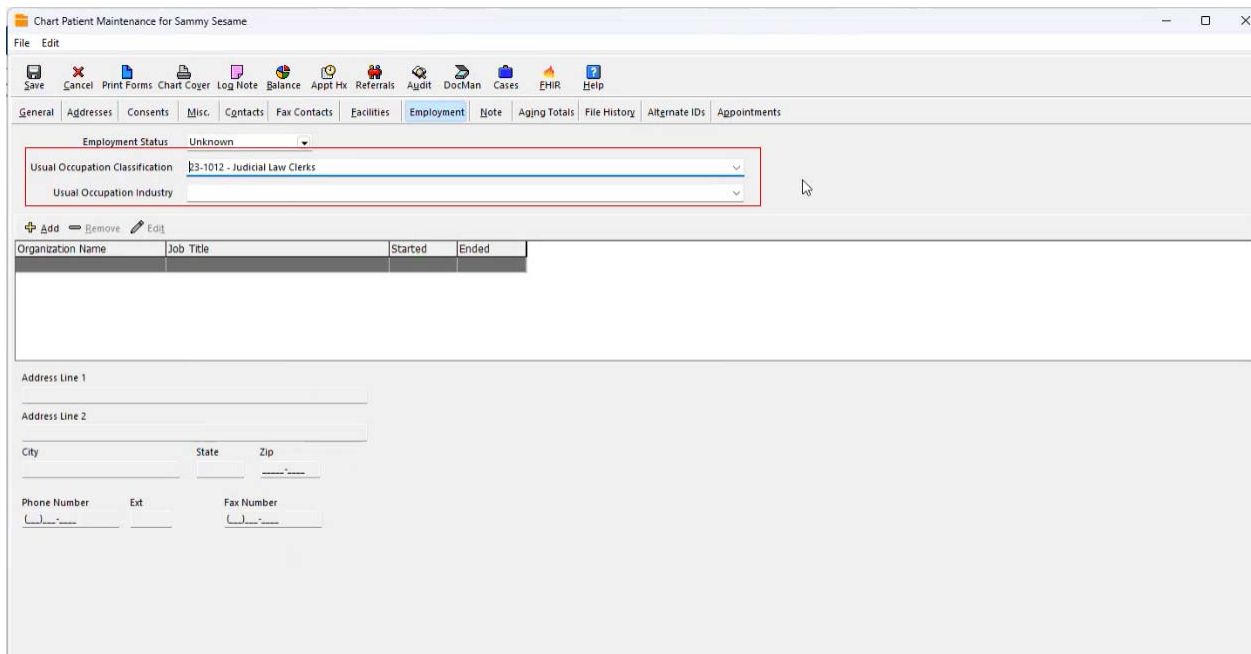


Figure 4. Employment tab

Click the drop-downs to select the appropriate items.

## Updated Employee Maintenance window

### New fields

There are two new fields on the Employment tab: Occupation Classification and Occupation Industry. Use these to specify the patient's actual occupation,

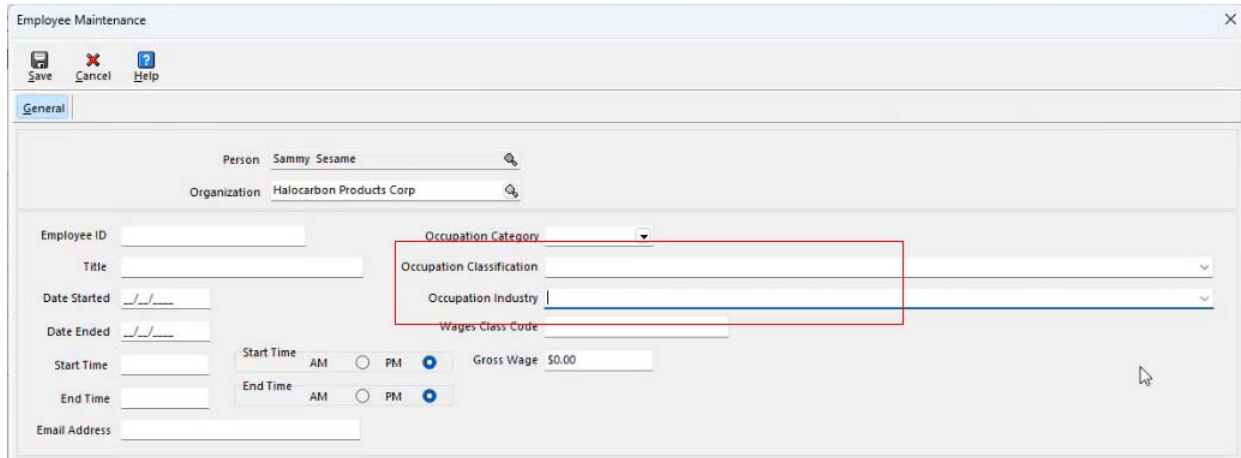


Figure 5. Employee Maintenance window

## Updated Occupational Data codes

The latest Occupational Data codes have been loaded into this version of CGM eMDs.

Find  ✖

- 000000 - Not Coded - Industry
- ⊕ 11 - Agriculture, Forestry, Fishing and Hunting
- ⊕ 21 - Mining, Quarrying, and Oil and Gas Extraction
- ⊕ 22 - Utilities
- ⊕ 23 - Construction
- ⊕ 31-33 - Manufacturing
- ⊕ 42 - Wholesale Trade
- ⊕ 44-45 - Retail Trade
- ⊕ 48-49 - Transportation and Warehousing
- ⊕ 51 - Information
- ⊕ 52 - Finance and Insurance
- ⊕ 53 - Real Estate and Rental and Leasing
- ⊕ 54 - Professional, Scientific, and Technical Services
- ⊕ 55 - Management of Companies and Enterprises
- ⊕ 56 - Administrative and Support and Waste Management and Remediation Services
- ⊕ 61 - Educational Services
- ⊕ 62 - Health Care and Social Assistance
- ⊕ 71 - Arts, Entertainment, and Recreation
- ⊕ 72 - Accommodation and Food Services
- ⊕ 81 - Other Services (except Public Administration)
- ⊕ 92 - Public Administration

Figure 6. Usual Occupation Industry codes

## Updated Find Country window

The Find Country window now displays the Alpha 2 and Alpha 3 Codes.

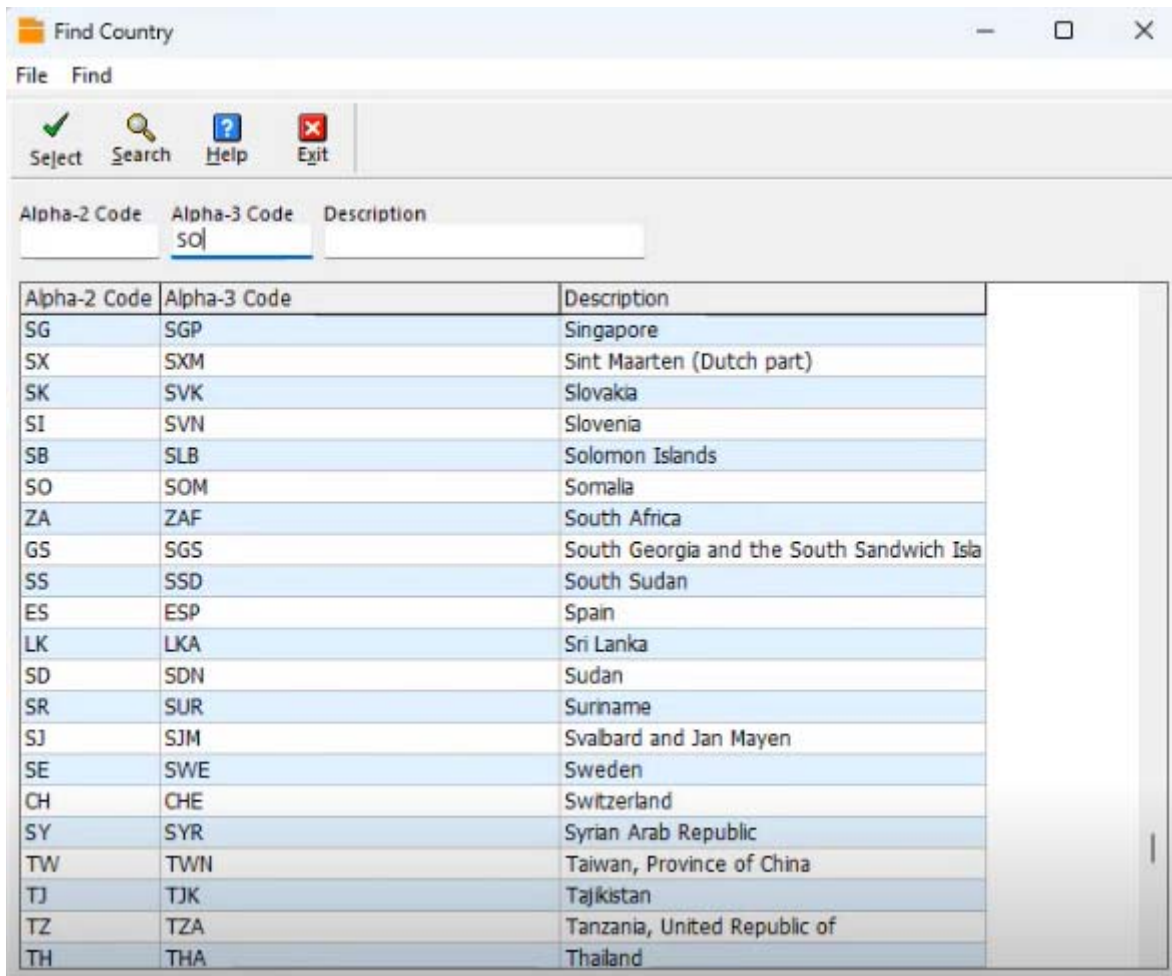


Figure 7. Find Country window

You can search for a country using any of the three fields on the window.

## Updated Miscellaneous tab of Patient Demographics

### Updated Country field

The Country field has been updated with a lookup that will open the Find Country window.

The screenshot shows the 'Miscellaneous' tab of the Patient Demographics form. The 'Country Of Origin' field is highlighted with a red box and contains a magnifying glass icon, indicating a lookup function. Other fields include Degree, Living Dependency, Sexual Orientation, Birth City, Mothers Maiden Name, Living Arrangement, Gender Identity, Birth State, Medication History Consent, Living Situation, Religion, Country Of Origin, Funding Stream, Multiple Birth, Birth Order, Date of Death, Confidential Email, Direct Address, Military Status, and various checkboxes for Student, 330g Grantee, Living Will, Organ Donor, Agricultural Worker, Migrant, and Seasonal. The bottom of the form shows dates for First Visit, Last Visit, and Release, along with Patient Signed, Account Status, Dominant Side, and Alternate FileID.

Figure 8. Miscellaneous tab

## New Travel History

### Updated Health Summary

There is a new button on the Health Summary under Communicable Disease History: Travel History. Click this button to open the Travel History window, which you can use to enter a patient’s travel history.

The screenshot shows the 'Health Summary' window with a list of categories: Problems, Allergies, Medications, Immunizations, PPH/FPH/SH, Tobacco/Alcohol/Supplements, Substance Abuse History, Mental Health History, Communicable Disease History, Travel History, Communicable Diseases (eg STDs), and Implantable Devices. The 'Travel History' option is highlighted with a blue box and has a green checkmark next to it, indicating it has been entered for the patient.

Figure 9. Health Summary

Note: A green check mark indicates that travel history has been entered for the patient.

## New Travel History window

Use the Travel History window to enter and track a patient's travel history.

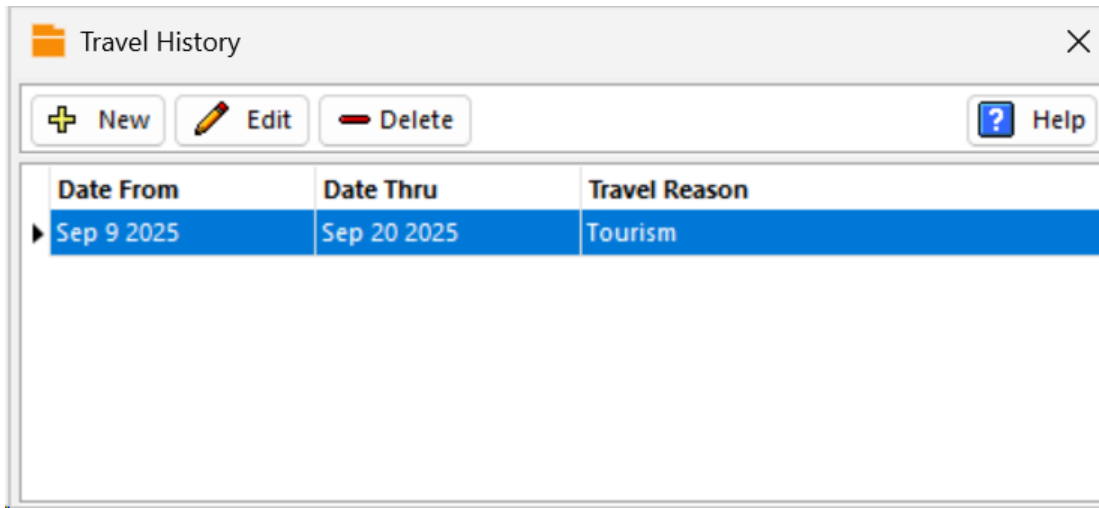


Figure 10. Travel History window

The table below describes the elements on this window.

Element	Description
New button	Click this button to open the Travel History - New window, on which you can enter new travel history for the patient. For more information on this window, see <a href="#">“New Travel History - New window” on page 11</a> .
Edit button	Click this button to edit the selected travel history entry.
Delete button	Click this button to delete the selected travel history entry.
Help button	Click this button to open the Help system for CGM eMDs.
Grid	Shows you the travel history entries.

## New Travel History - New window

Use this window to enter new travel history for the patient.

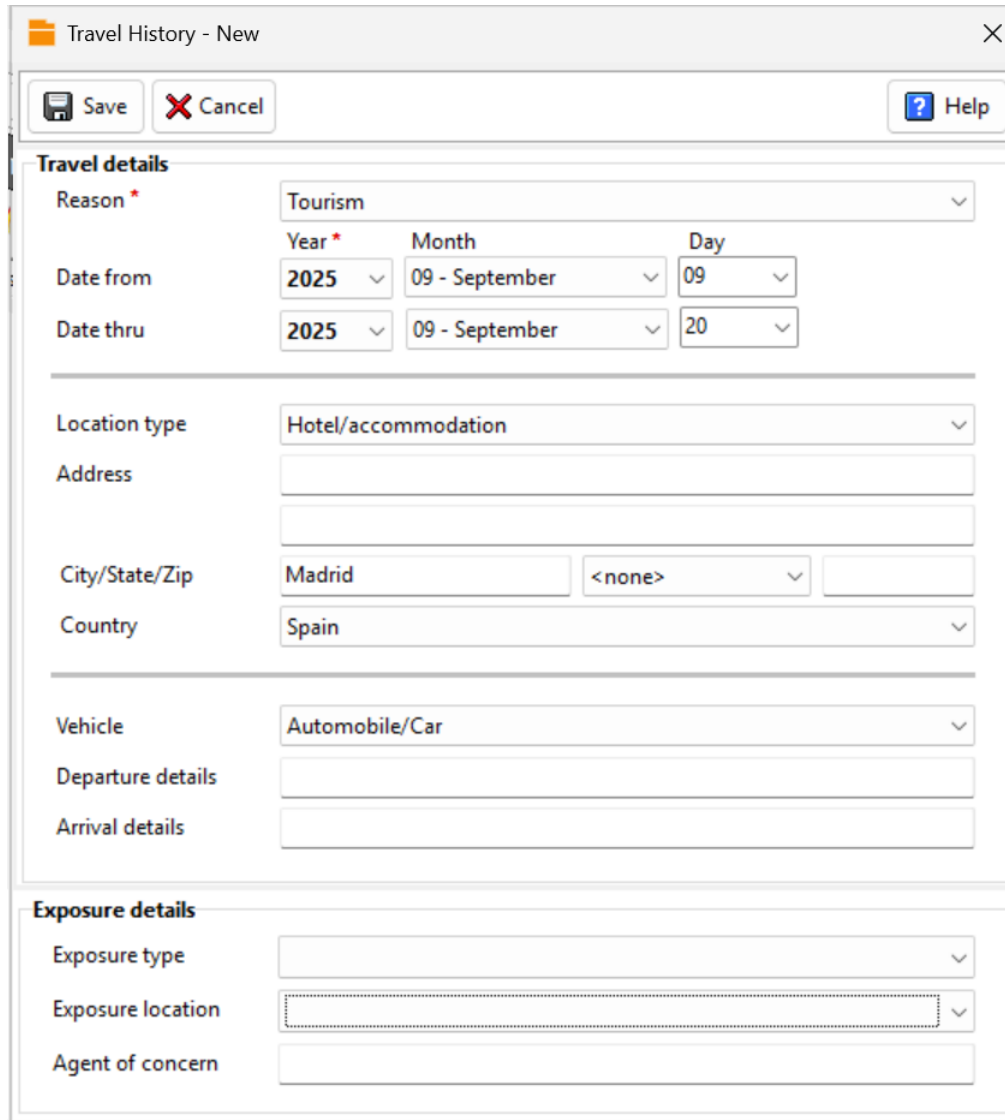


Figure 11. Travel History - New window

The table below describes the elements on this window.

Element	Description
Save button	Click this button to save the changes.
Cancel button	Click this button to close the window without saving any changes.
Help button	Click this button to open the Help system.
Reason (required)	Select the reason for the travel from the drop-down.

Element	Description
Date Range	Enter the date range of the travel (if known). The Year is required.
Location type	Select the Location Type from the drop-down.
Address	Enter the address of the location.
Vehicle	Enter the type of vehicle that was used.
Departure details	Enter the details on the departure
Arrival details	Enter the arrival details.
Exposure type	Select an Exposure type from the drop-down. If there was none, you can leave this field blank.
Exposure location	Select the Exposure location from the drop-down.
Agent of concern	Enter the agent that created the concern for the patient.

Travel history information will appear on the C-CCD and you can also add it to the Visit Note.

## Updated Visit Note

### New Travel History option

There is a new option when you click the CC button on the CC section of the Visit Note: Travel History. Click this option to open the Travel History window for the patient.

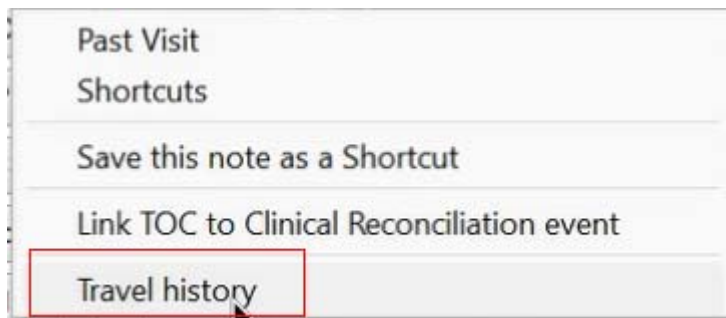
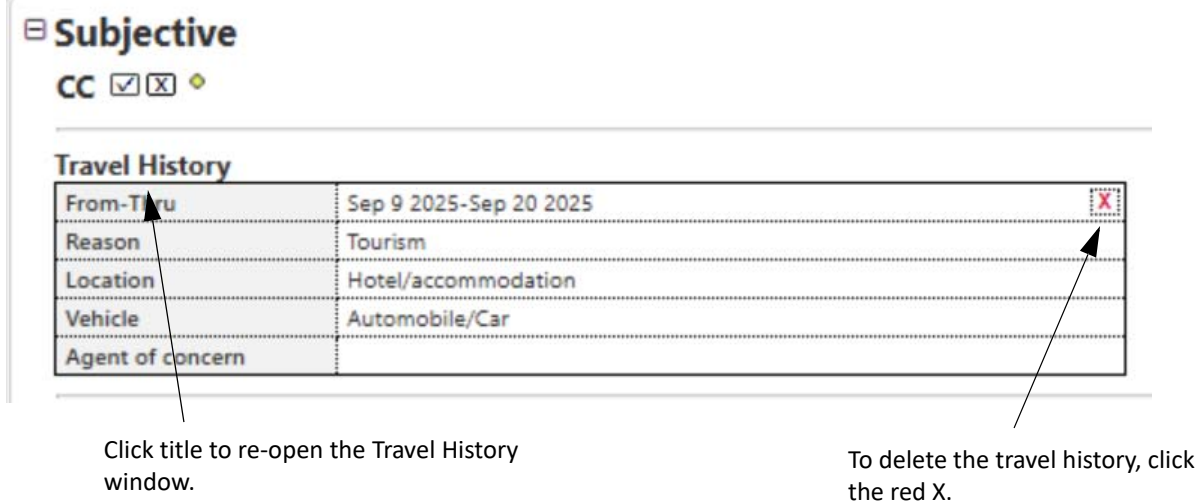


Figure 12. CC button menu

You can also edit and add new travel history from this section.

Once the Travel History window is open, you can select an entry and click the Add to Note button.



**Subjective**  
CC

**Travel History**

From-Thru	Sep 9 2025-Sep 20 2025	<input checked="" type="checkbox"/>
Reason	Tourism	
Location	Hotel/accommodation	
Vehicle	Automobile/Car	
Agent of concern		

Click title to re-open the Travel History window.

To delete the travel history, click the red X.

Figure 13. Visit Note - CC section

You can also click the Travel History title in the Visit Note details to open the Travel History window as shown above.

To remove the Travel History entry from the Visit Note, click the red X in the top right.

Note: If you make changes to a travel history entry in the Travel History window, it will NOT update the entry as it appears in the Visit Note. If you want to do this, you must add the travel history entry to the Visit Note again.

# Clinical Features and Enhancements

## Vitals

### Updated Last Menstrual Period

There is a new Plus sign and window for entering more Last Menstrual Dates.

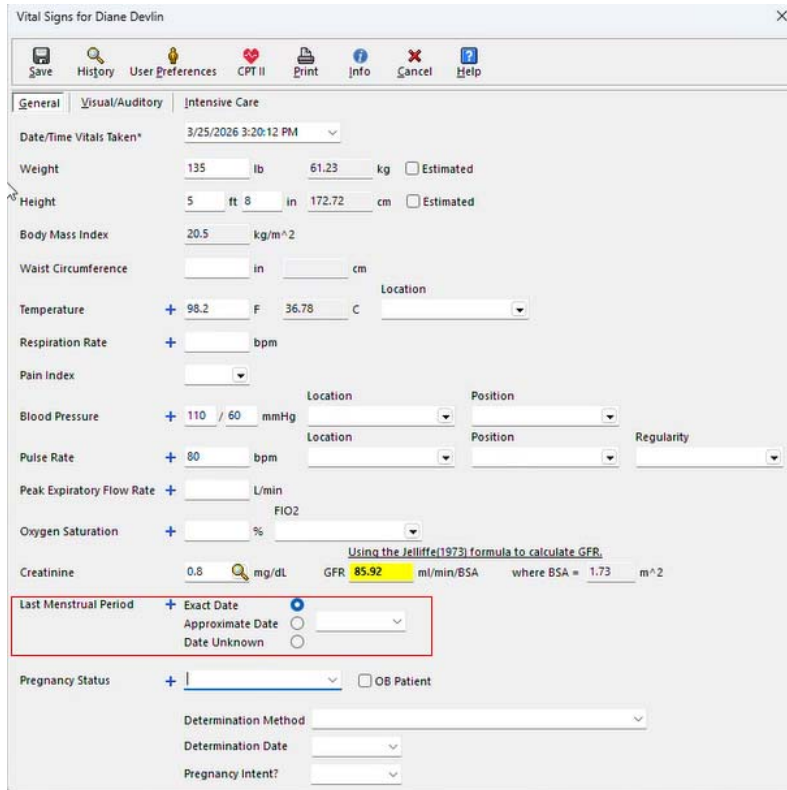


Figure 14. Vitals window

## New Additional Last Menstrual Periods window

Clicking the + Sign will open the Additional Last Menstrual Periods window. Use this window to record other Last Menstrual Periods.

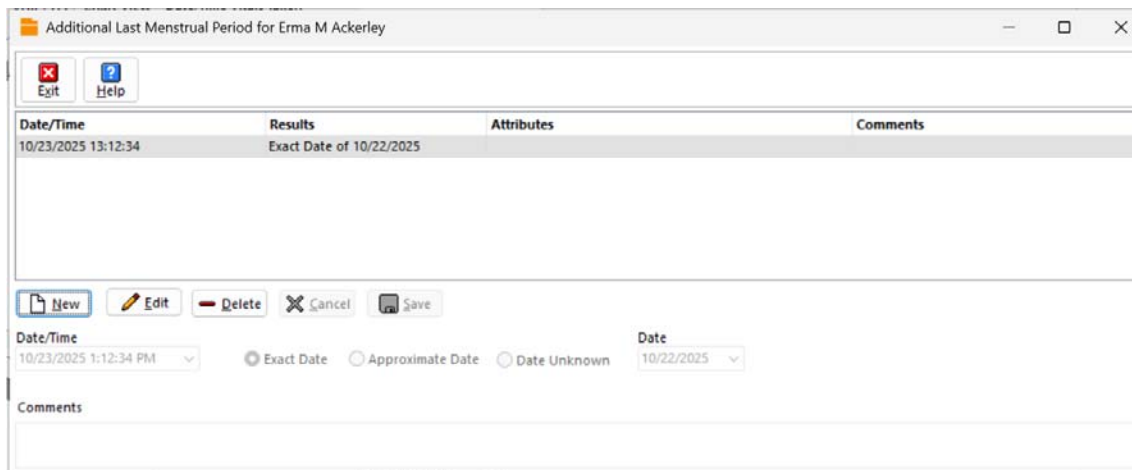


Figure 15. Additional Last Menstrual Period window

The table below describes the elements on this window.

Element	Description
Exit button	Click this button to close the window.
Help button	Click this button to open the Help system.
New button	Click this button to enter a new Last Menstrual Period.
Edit button	Click this button to edit the highlighted item.
Delete button	Click this button to delete the highlighted item.
Cancel button	Click this button to cancel any changes.
Save button	Click this button to save the changes.
Date/Time	Enter the date and time the information was recorded.
Comments	Enter any comments for the information.

### New Pregnancy Status and Pregnancy Workflows

There is a new section on the Vitals window: Pregnancy Status. Use the fields in this section to indicate the patient's pregnancy status. Users can now document a Yes to pregnancy without creating a new OB Module insert for the patient.

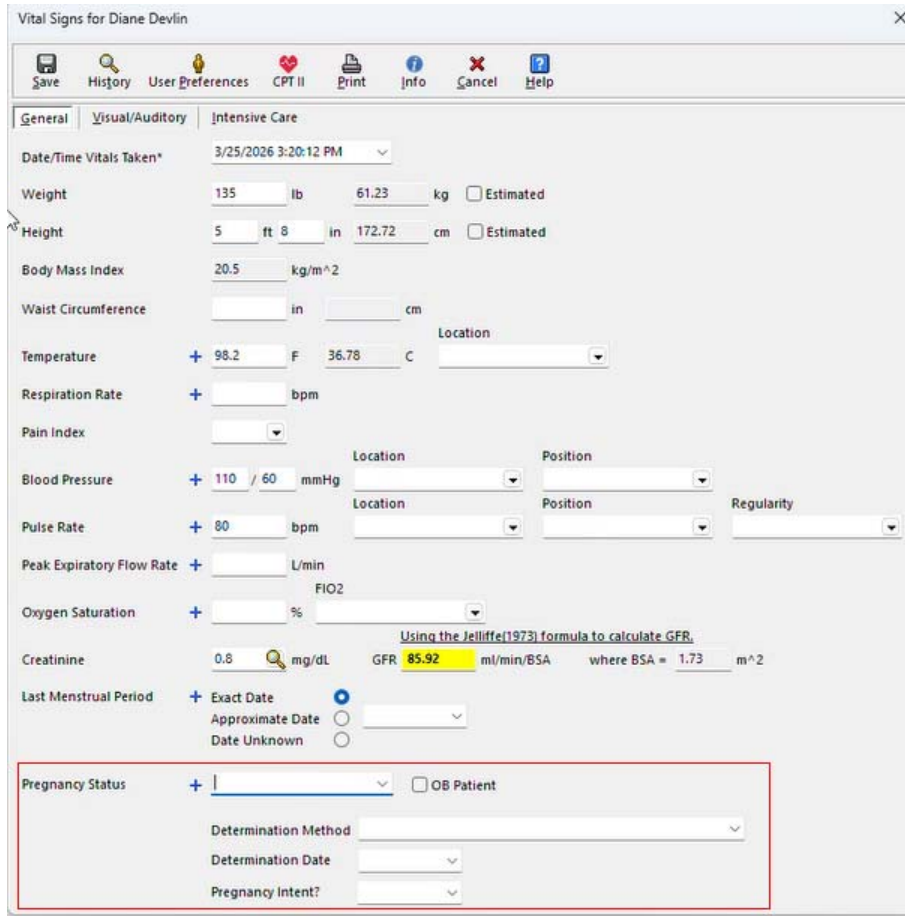


Figure 16. Vitals window

The table below describes the new fields.

Element	Description
Status	<p>You can select one of the options from the drop-down:</p> <ul style="list-style-type: none"> <li>No--No desire to become pregnant (the next time the window is opened, the Status will be blank)</li> <li>Possibly: Not sure</li> <li>Yes--Wants to become pregnant</li> </ul> <hr/> <p>If Possibly or Yes is selected, that will become the "sticky" choice.</p> <hr/> <ul style="list-style-type: none"> <li>Blank - This is the default option</li> </ul>
OB Patient	Select this check box if the patient is an OB patient.

Element	Description
+ Sign	Click the + sign to open the Additional Pregnancy Status window (for more information, see <a href="#">“New Additional Pregnancy Status window” on page 17.</a> )
Determination Method	Select the method that was used to determine the patient’s pregnancy status. You can select Blank for this.
Determination Date	Enter the date that the determination was made.
Pregnancy Intent?	Select the patient’s pregnancy intent. This can be left blank. Blank is the default option.

## New Additional Pregnancy Status window

There is a new window, which you can use to record additional Pregnancy Statuses.

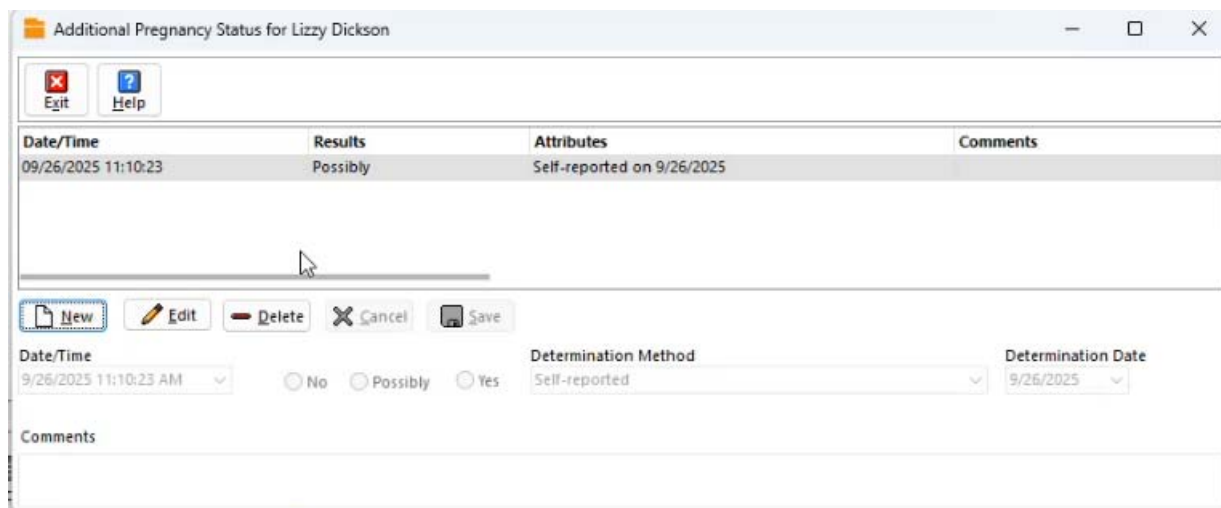


Figure 17. Additional Pregnancy Status window

The table below describes the elements on this window.

Element	Description
Exit button	Click this button to close the window.
Help button	Click this button to open the Help system.
New button	Click this button to enter a new Pregnancy Status
Edit button	Click this button to edit the highlighted item.
Delete button	Click this button to delete the highlighted item.
Cancel button	Click this button to cancel any changes.
Save button	Click this button to save the changes.
Date/Time	Enter the date and time the information was recorded.
Determination Method	Select the Determination Method from the drop-down.
Determination Date	Enter the Determination Date.

Element	Description
Comments	Enter any comments for the information.

You can add the existing vitals to the Note and see the new information there.

**Objective**

Vitals

Current Vitals	
Date	9/26/2025 11:10:23 am
Ht	5 ft, 6 in
Wt	135 lbs
BMI	21.8
Preg Status	Possibly pregnant (Self-reported on 09/26/2025)
LMP	Approximately 08/31/2025

Repeat Vitals		
	9/26/2025 11:14:09 am	9/26/2025 11:14:54 am
LMP	Approximately 07/31/2025	
Preg Status		Not pregnant (Urine pregnancy test on 09/26/2025)

Figure 18. Visit Note--Vitals section

## Updated C-CDA

This new pregnancy detail will appear on the C-CDA in accordance with USCDI V3 Health Assessment standards. This will support USCDI V3 Health Assessment standards and meet interoperability requirements by sharing a patient's Pregnancy Status data.

## Updated Care Plan

### Editability

The ability to edit the Care Plan details has been restored. Simply click on a heading to open the window.

**Care Plan Details**

Description: New Care Plan 2

SDOH:  No

Patient Name: Deptford, Dupree M.

Plan Status: Active

---

Created Date: Oct 20, 2025 10:07 AM

Modified Date: Oct 01, 2025 01:31 PM

Due Date: Oct 20, 2025

Location: Bleeding Edge Trauma Center

Care Team: • Dr. Charlatan, DO (admitting physician) • Edward Endocrin, MD (admitting physician)

Figure 19. Care Plan Details

## Updated New Care Plan window

### New check box

There is a new check box on the New Care Plan window: SDOH (Social Determinants of Health). Select this check box if you want SDOH elements needed for the C-CDA to be pulled into the patient's C-CDA.

- Health Concerns
- Interventions
- Goals

The screenshot shows a 'New Care Plan' window with the following elements:

- Buttons: Save, Cancel
- Status: Active (dropdown)
- Description: New Care Plan (text input)
- Facility: SS Hurricane Regression Base (dropdown)
- SDOH care plan:  (checkbox, highlighted with a red box)
- Created: 10/23/2025 1:29:22 PM (dropdown)
- Modified: 10/23/2025 1:29:22 PM (dropdown)
- Due Date: (dropdown)
- Sections: 4 total sections (button), Edit Care Plan Sections (button)
- Care Team section:
  - DBs (4 members) (dropdown), New (button), Edit (button)
  - Table with columns: Name, Certification, Role

Name	Certification	Role
▶ Hurricane Blevins	MD	
Riddell Cosigner	--	
Riddell Persivia	--	
Wayne Best	MD	

Figure 20. New Care Plan window

### New Role column

There is a new column in the Care Team grid: Role. When you select members of the Care Team, you can specify a role as well. In addition, you can type in a role if it is not listed in the drop-down.

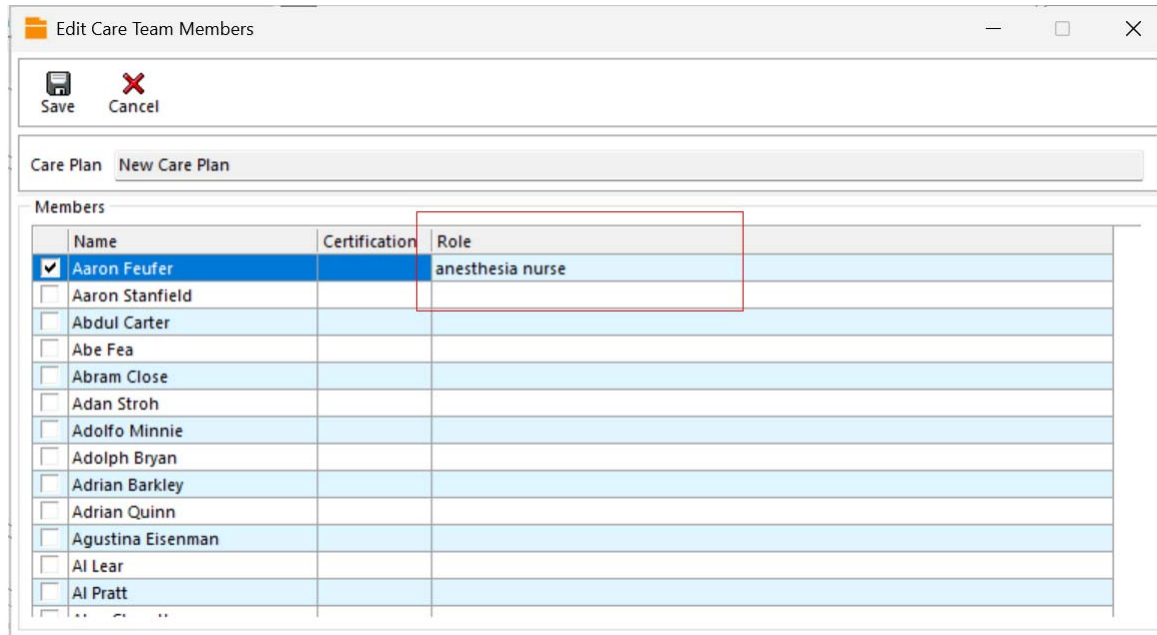


Figure 21. Edit Care Team Members window

The Role also appears in the Care Plan Details.

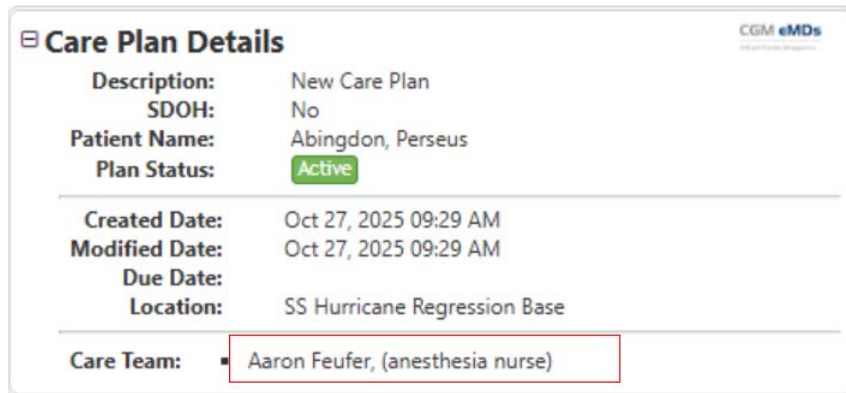


Figure 22. Care Plan Details

## Updated Care Plan Details

SDOH has been added to the Care Plan Details.

The screenshot displays the 'Care Plan Details' interface. On the left is a sidebar with the following buttons: 'Toggle Admin Console', 'Print Preview', 'Toggle All Details', 'Care Plan Details', 'Goals', 'Health Concerns', 'Interventions', and 'Evaluations and Outcomes'. The main content area is titled 'Care Plan Details' and includes the following information:

- Description:** New Care Plan
- SDOH:** No
- Patient Name:** Ackerley, Erma M.
- Plan Status:** Active
- Created Date:** Oct 23, 2025 01:29 PM
- Modified Date:** Oct 23, 2025 01:29 PM
- Due Date:**
- Location:** SS Hurricane Regression Base
- Care Team:**
  - Wayne Best, MD ()
  - Hurricane Blevins, MD ()
  - Riddell Cosigner, ()
  - Riddell Persivia, ()

Below the Care Plan Details section are three expandable sections: 'Goals' (with an 'Add Goals Item' button), 'Health Concerns' (with an 'Add Health Concerns Item' button), and 'Interventions' (with an 'Add Interventions Item' button').

Figure 23. Care Plan Details

## CCDA HCPCS Code Update

Letter codes and custom codes will now be listed as part of the C-CDA.

## CCDA Lab Specimen Details

Specimen details imported using IFE are now included in the C-CDA.

## New Questionnaire Form

You can now add new Assessment/Questionnaire forms and save them, preview them, and print them. You can create questions that appear on the form, determine their order, decide if answers are required or not, give answers a score, and print the questionnaire to PDF.

## General Workflow

1. The questionnaire editor is used to create a questionnaire by adding questions and possible answers.
2. Completed questionnaires are made available within patient context and results are saved per patient.
3. Questionnaire results, along with any procedure codes, may be added to the patient's visit note.

## Creating Questionnaires

### New Menu Option

In the Chart module, there is a new option under the Tools menu: Questionnaire Editor. Click this option to open the Questionnaire List window. Administrators will go here to create Questionnaires to be used by staff within the patient chart and chart note.

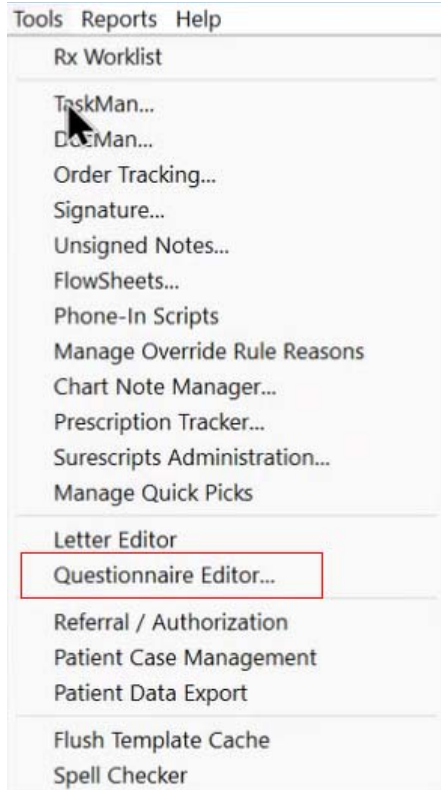


Figure 24. Tools menu

## New Questionnaire Edit window

The window displays the existing questionnaires. You can create, edit, and delete questionnaires from here.

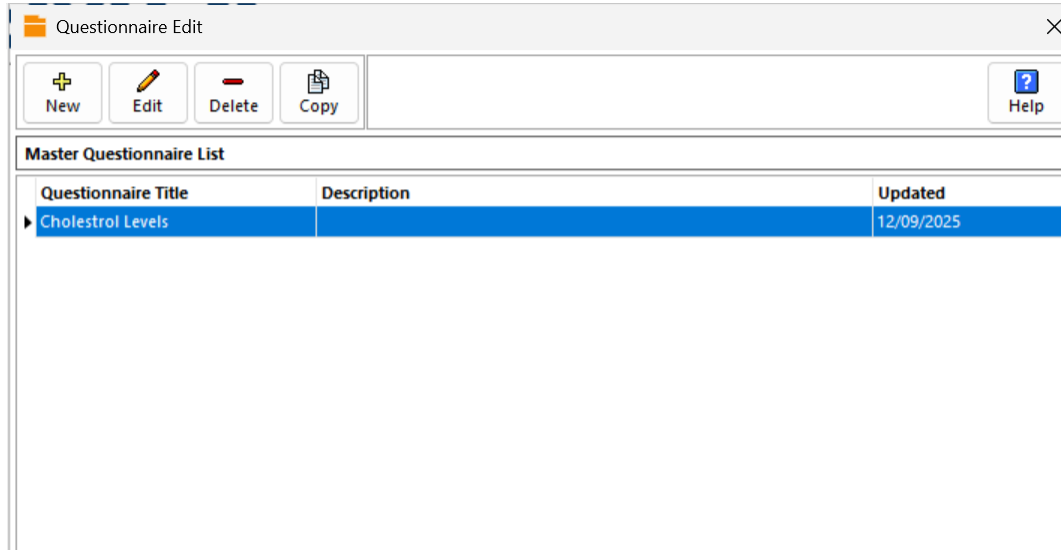


Figure 25. Questionnaire Edit window

The table below describes the elements on this window.

Element	Description
New button	Click this button to create a new questionnaire.
Edit button	Click this button to edit the selected questionnaire.
Delete button	Click this button to delete the selected questionnaire.
Copy button	Click this button to copy the selected questionnaire.
Help button	Click this button to open the Help system.
Grid	Shows you the list of questionnaires.

## New Questionnaire Editor Window

Use this window to arrange the questions on the form, give the form a name and description, add a logo, as well as add new questions (selecting what type of question).

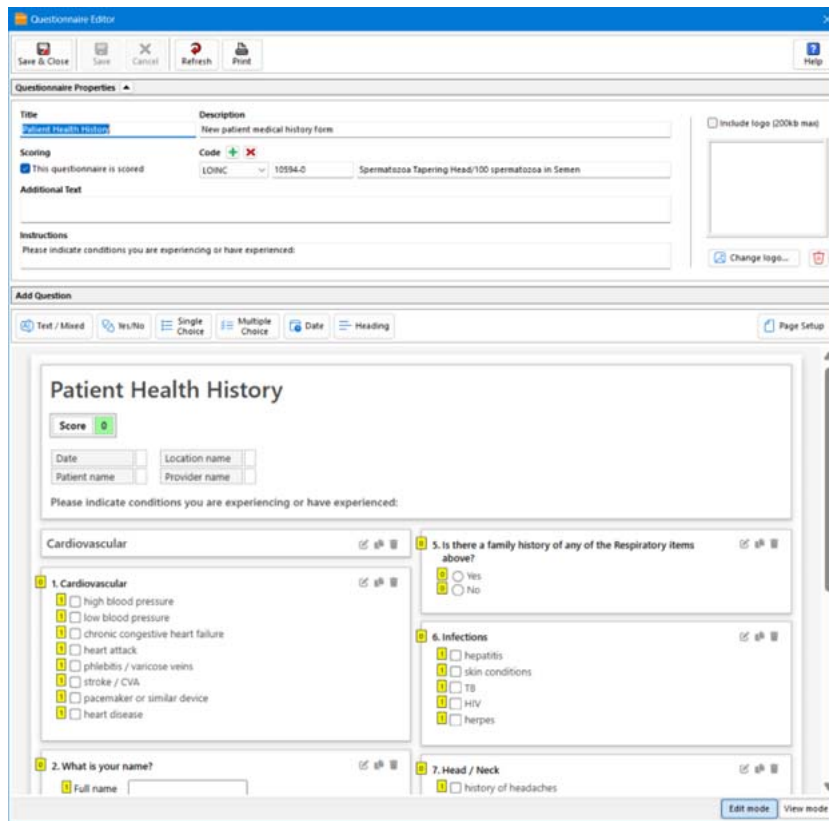


Figure 26. Questionnaire Editor window

The table below describes the elements on this window.

Element	Description
Save and Close button	Click this button to save the changes and close the window.
Save button	Click this button to save the changes.
Cancel button	Click this button to close the window without saving changes.
Refresh button	Click this button to refresh the window.
Print button	Click this button to print the questionnaire.
Help button	Click this button to open the Help system.
<b>Questionnaire Properties section</b>	
Title	Enter a title for the questionnaire.
Description	Enter a description for the questionnaire.
This question is scored check box	Select this check box if the questionnaire will be scored.

Element	Description
Code	Use the + button to add a LOINC or SNOMED code to the questionnaire. You can have either a LOINC or a SNOMED. Use the red X to delete a code if present.
Additional text	Use this field to enter any additional text or description for the item.
Instructions	Use this field to enter instructions for the patient or staff.
<b>Logo section</b>	
Include logo	Select this check box if you want to include a logo on the questionnaire.  Note that you can specify the size of the logo on the new Questionnaire Page Setup window (see <a href="#">“New Questionnaire Page Setup window” on page 28</a> for more information).
Change logo button	Click this button to search for a logo to include in your questionnaire.
Trash can icon	Click this icon to delete the logo.
<b>Add Question section (For information on the Question Editor window, see <a href="#">“New Question Editor - Edit window” on page 25</a>).</b>	
Type of question:	
Text	The patient enters text as the answer (name, address, and so on)
Yes/No	Patient selects Yes or No as answer.
Single choice	Patient selects a single choice for their answer.
Multiple choice	Patient selects one of several possible answers.
Date	Patient enters a date.
Heading	Click this choice to create a header within the Questionnaire question choices.
Page Setup	Click this button to open the Questionnaire Page Setup window. For more information, see <a href="#">“New Questionnaire Page Setup window” on page 28</a> .
Edit Mode button	Click this button to enter Edit mode. The screen capture above shows you the Edit Mode.
View Mode button	Click this button to view the form as it is.

## New Question Editor - Edit window

Use this window to create questions for your form and specify

- The Question
- The Answer set
- The tip/Help for the question

- The Score Value
- The Answers available

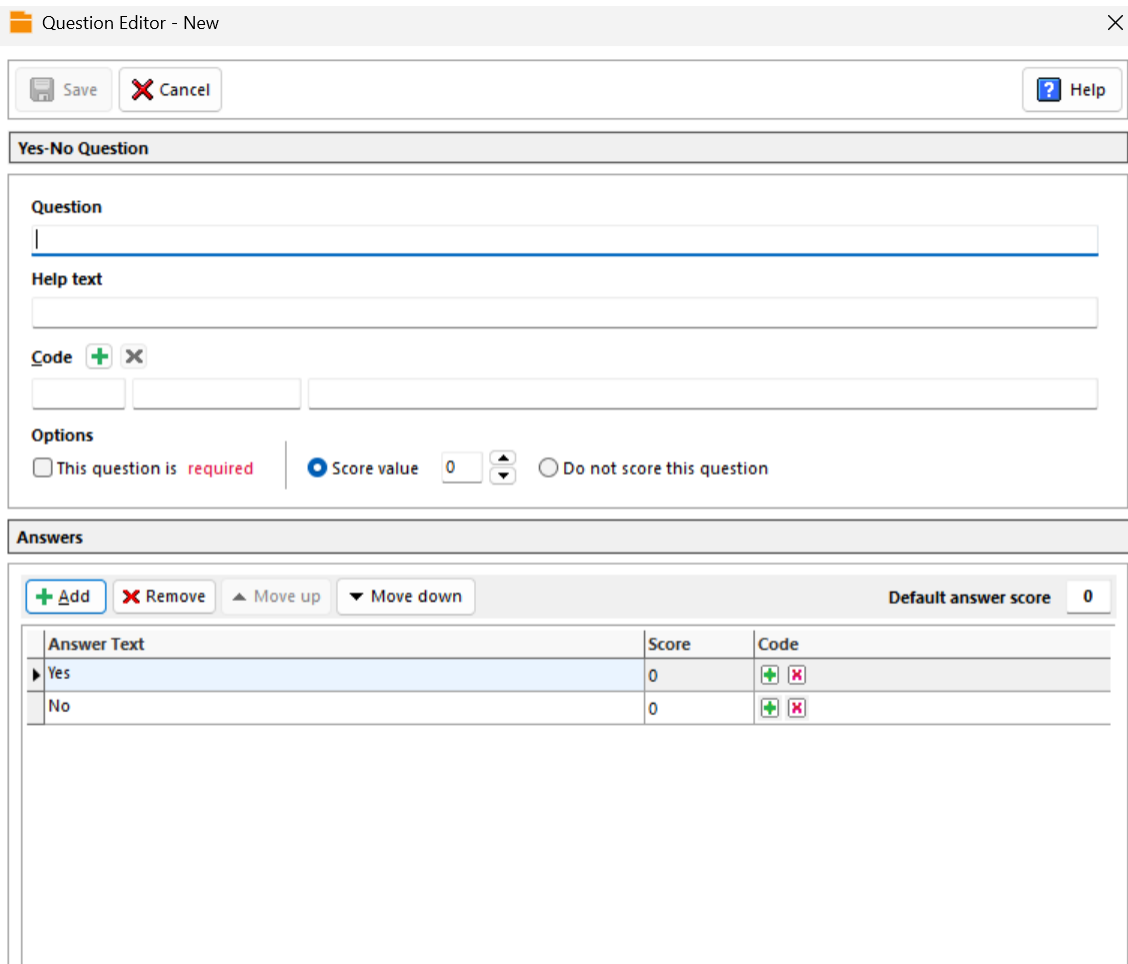


Figure 27. Question Editor - Edit window

The table below describes the elements on this window.

Element	Description
Save button	Click this button to save the question.
Cancel button	Click this button to cancel and close the window.
Help button	Click this button to open the Help system.
<b>Question section</b>	
Question	Enter the question text here.
Help Text	Enter a tip for the user, to help answer the question.
Code	Use the + button to add a LOINC or SNOMED code to the questionnaire. You can have either a LOINC or a SNOMED. Use the red X to delete a code if present.




Element	Description
<b>Options section</b>	
This question is required check box	Select this check box if you want the question to be required.
Score value	Enter or select a Score Value for the question.
Do not score this question radio box	Select this if you do not want the question to be part of the score.
<b>Answer section</b>	
Add button	Click this button to add an answer for the question.
Remove button	Click this button to remove the selected answer.
Move up button	Click this button to move a selected answer up.
Move down button	Click this button to move a selected answer down.
Grid	<p>The grid shows the answers that have been created.</p> <ul style="list-style-type: none"> <li>Click the green + sign to open the Code Search window, on which you can select to add a SNOMED or LOINC code to the answer.</li> <li>Click the red X to remove the code.</li> </ul>

When you are in edit mode on the Questionnaire window, each question will have three icons in the top right corner.



Figure 28. Question

The table below describes these icons.

Icon	Description
	Edit. Click this icon to edit the question by opening the Question Editor window.
	Copy. Click this icon to copy the question.
	Delete. Click this icon to delete the question.

## New Questionnaire Page Setup window

Use this window to specify such settings as margins, sizing, and alignment for the questionnaire.

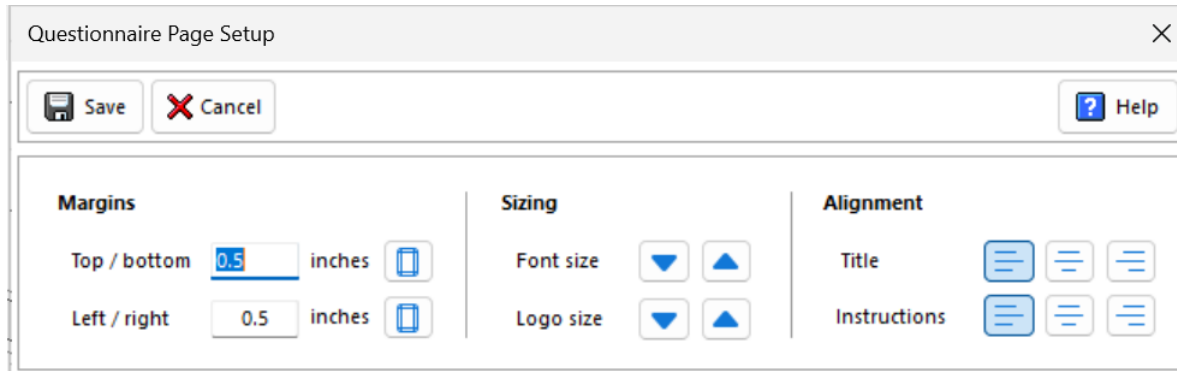


Figure 29. Questionnaire Page Setup window

The table below describes the elements on this window.

Element	Description
Save button	Click this button to save the changes.
Cancel button	Click this button to close the window without saving any changes.
Help button	Click this button to open the Help system.
Margin section	Use this section to specify the margins for the questionnaire.
Sizing section	Use this section to specify the font size to be used and the size of the logo.
Alignment section	Use this section to indicate the position of the Title and Instructions on the questionnaire.

## Rearranging questions

You can rearrange the questions by dragging and dropping them.

## Using Questionnaires

The following updates to CGM eMDs enable you to call up and complete questionnaires when seeing patients. You can also add them to the Visit Note.

### New Menu option

There is a new Patient Questionnaires option on the drop-down menu opened from clicking the icon with three horizontal lines. Click this button to open the Patient Questionnaires window.

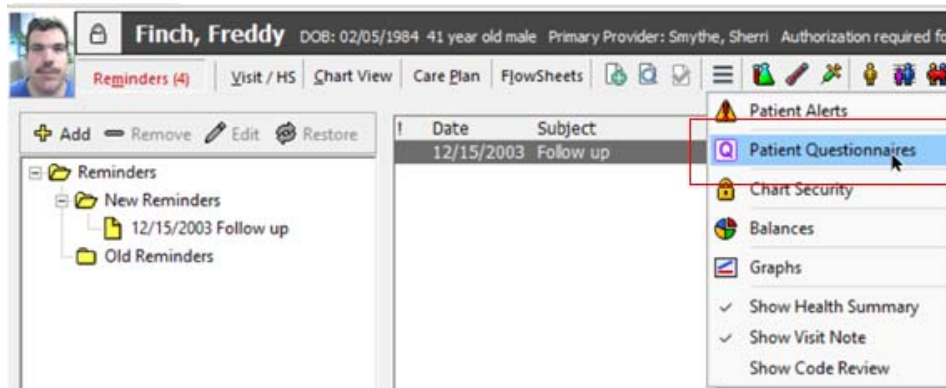


Figure 30. Drop-down menu

### New Patient Questionnaires window

Use this window to select a questionnaire to complete for the selected patient.

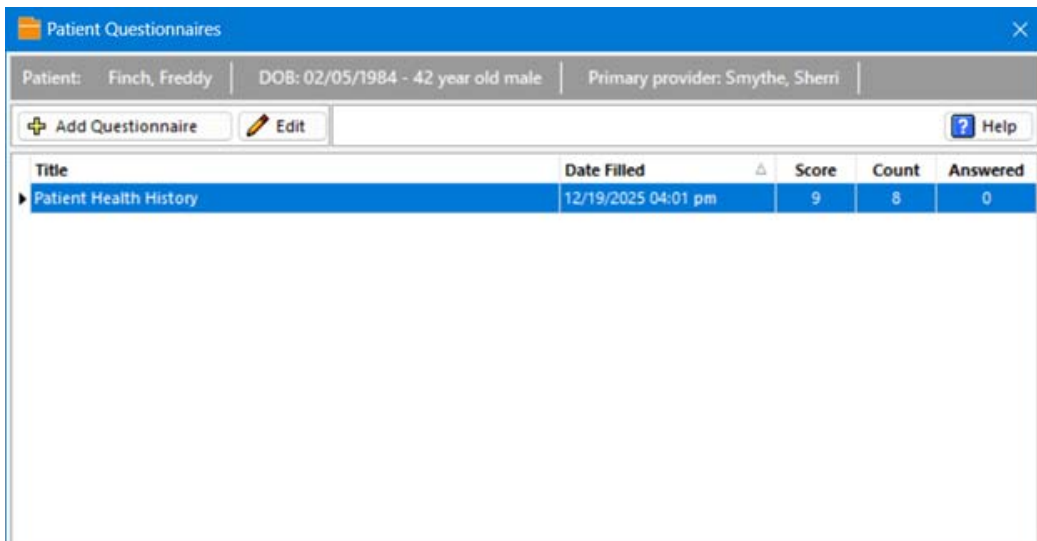


Figure 31. Patient Questionnaires window

The table below describes the elements on this window.

Element	Description
Add Questionnaire button	Click this button to open a window on which you can select a questionnaire to add to the patient. When you select a questionnaire, it will open on the screen.  At this point, you can complete the questionnaire as you interview the patient.  Click the Save and Close button to add it to the patient's questionnaires.

Element	Description
Edit button	Click this button to edit the selected questionnaire.

To delete a questionnaire from the patient’s record, right-click on the selected questionnaire and select Delete.

## Documenting and Adding Questionnaires to the Visit Note

### New menu option

There is a new option on the Assessment menu: Questionnaire. Clicking this option will open the Patient Questionnaires window (for more information, see “[New Patient Questionnaires window](#)” on page 29). Use this workflow to add to the patient chart note.

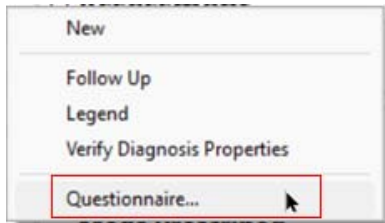


Figure 32. Assessment menu

To add the questionnaire to the Note itself, click the Add to Note button.

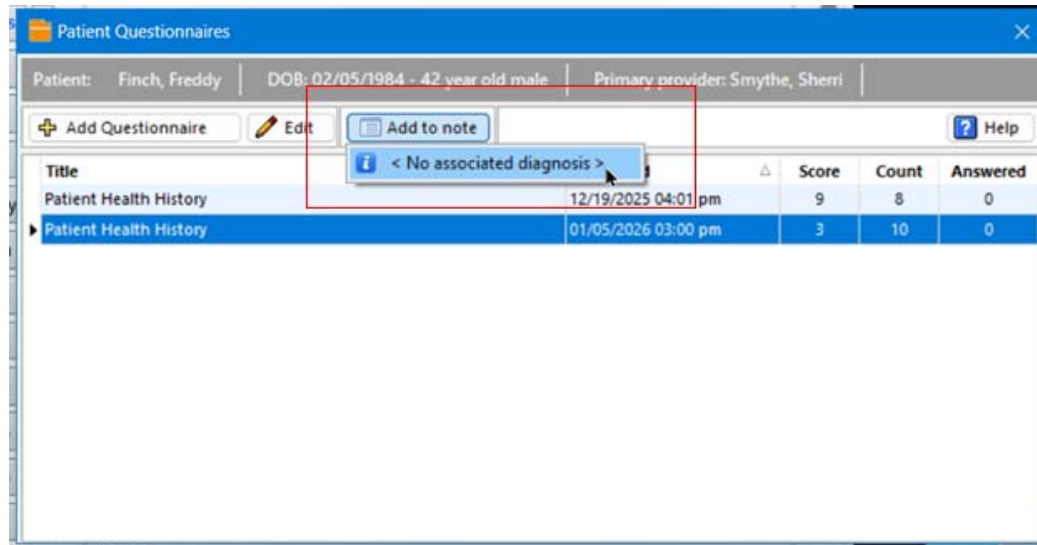
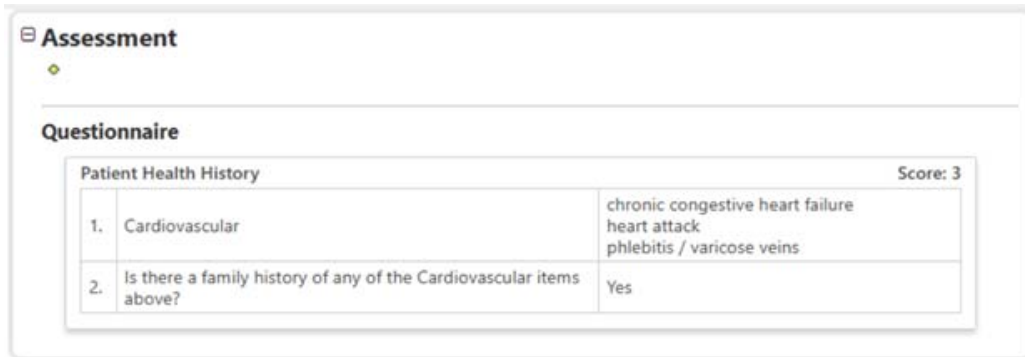


Figure 33. Patient Questionnaires window

When the questionnaire is added to the Note, it will appear like this:



Patient Health History		Score: 3
1.	Cardiovascular	chronic congestive heart failure heart attack phlebitis / varicose veins
2.	Is there a family history of any of the Cardiovascular items above?	Yes

Figure 34. Assessment section of Note

## Updated Regulatory Requirements for USCDIv3

### Updated C-CDA

#### Encounter Type, Time, and Location

Encounter Type, Time, and Location data are now stored for C-CDA parsing using C-CDA R2 Standards. This update supports USCDI V3 Encounter standards and meets interoperability requirements by sharing a patient's complete Encounter data.

#### Health Insurance Data

Health Insurance data is now stored for C-CDA reporting using C-CDA R2 Standards. This update supports USCDI V3 Health Insurance standards and meet interoperability requirements by sharing a patient's health insurance payer, coverage status, and coverage type.

When a patient has Health Insurance coverage information saved and the C-CDA file is created, the patient's Coverage Status and Type will be included in a new Payers section using the new CCDA coverage-activity template.

#### Problem Observation Data

Problem Observation data is now stored for C-CDA parsing using C-CDA R2 Standards. This update supports the newest USCDI V3 Problems and Health Concern standards and meets interoperability requirements by sharing identified Problems/Health Concerns. This applies to USCDI Elements: Encounter Diagnosis and Health Assessments (Including SDOH).

#### Structured Assessment

Structured Assessment data is now stored for C-CDA reporting using C-CDA R2 Standards. This update supports structured assessments (set of specific questions with standardized answer options) such as PRAPARE, Disability Assessments, etc, so they can be pulled into a CCDA template for data sharing and interoperability.

When you enter a structured Assessment, the following information is sent to the C-CDA:

- Assessment (Survey) Code
- Question Code
- Code System: LOINC
- Status

- DateValue of Assessment

## CGM Prescribe

### Updated Rx Worklist

#### New Column

There is a new column on the grid of the Rx Worklist: Primary Provider. This column shows the primary provider listed in the patient’s demographics.

The screenshot shows the 'Rx Worklist' interface. At the top, there is a toolbar with buttons for 'New', 'Chart', 'Priority', 'Send Rx', 'Show Unlinked', 'Options', 'ePA', and 'Close'. Below the toolbar are filters for 'Date Range' (3/30/2026 thru 3/30/2026), 'Providers' (All Providers), and 'Facilities' (All Facilities). The main table has the following columns: Priority, Patient Name, Primary Provider, Providers, Facilities, Time in Queue, Date of Last Request, Last Appointment, and Next Appointment. The first row of data shows a patient named 'Smith, John A.' with a primary provider of 'Brainiac, Nanette', which is highlighted with a red box.

Priority	Patient Name	Primary Provider	Providers	Facilities	Time in Queue	Date of Last Request	Last Appointment	Next Appointment
	Smith, John A.	Brainiac, Nanette	Best, Wayne W	ChungKing Express Medical	1232 days +	11/13/2022		

Figure 35. Rx Worklist

## Billing Features and Enhancements

### Updated CGM Pay

#### Updated Payment Receipt Report

The Payment Receipt Report will now expand on the Check/CC column so that it doesn’t cut off the details of the credit card payment.

## eMEDIX Statements

### Updated Statement Options

There is a new option on the Statement Options window: Print statement if unopened after \_\_\_\_ days. Use this option to set the number of days that an unopened statement will wait before being automatically printed. This enables you to be certain that the patient has received a statement.

The screenshot shows the 'Statement Options' window with the following sections:

- Remit Address:** Includes a checked box for 'Use facility billing address', a 'Name' field with 'Bodlings', an 'Address' field with a search icon, and 'City', 'State', and 'Zip' fields.
- Return Address:** Similar to the Remit Address section, with 'Name' set to 'Bodlings'.
- Phone:** Includes 'Billing Questions' and 'Payment Options' text input fields.
- Credit Card Options:** Includes checked boxes for Mastercard, Visa, Discover, and American Express.
- Miscellaneous:** A red box highlights the 'Print statement if unopened after' dropdown menu, which is currently set to '7' days.

Figure 36. Statement Options window

This option has been added to the statement file to trigger automatic printing of the statement for the patient.

### E&M Coder update

The following codes will no longer roll up frees to the CG line: 90714, 90471, 90658, 90662, 90677, and 90732.

There is field added to the Insurance Maintenance window that should have a section in Bill updates too.

### New Insurance Demographics Field

A new Source of Payment field is available for additional documentation needed to describe the insurance for interoperability reporting. This information will be used on the CCDA and may be needed for quality measure reporting. You are advised to add this information to insurance companies.

The screenshot shows the 'Insurance Company Maintenance' window with the following fields and values:

- Name:** Aetna
- Office Number:** [Empty]
- Department:** [Empty]
- Network:** [Empty]
- Parent Organization:** (None)
- General Phone:** (800)255-2386 Ext. [Empty]
- Office Fax:** (800)255-2387
- Claims Phone:** (800)255-2388 Ext. [Empty]
- Referral Phone:** [Empty]
- Eligibility Phone:** [Empty]
- Address Line 1:** PO Box 28905
- Address Line 2:** [Empty]
- Zip:** 78228-0905
- City:** San Antonio
- State:** TX
- Country:** US
- Email Address:** [Empty]
- Insurance Type:** C1
- Insurance Class:** AET
- AN Increment:** 15
- Payor ID:** 60054
- Medigap ID:** [Empty]
- Default Filing Method:** EF
- Origin ID/Indicator Code:** C1
- National Plan ID:** [Empty]
- Source of Payment:** 511 - Commercial Mana (highlighted in red)
- Formulary ID:** [Empty]
- Claim Status Payor ID:** [Empty]
- Contract:** Aetna
- Allowed Fee Schedule:** Aetna
- Billed Fee Schedule:** Default Fee Sched.
- ERN GS02:** [Empty]
- Default Statement Hold Period:** 0 Days

Figure 37. Insurance Company Maintenance

Users will pick the appropriate Source of Payment from a tree view selection.

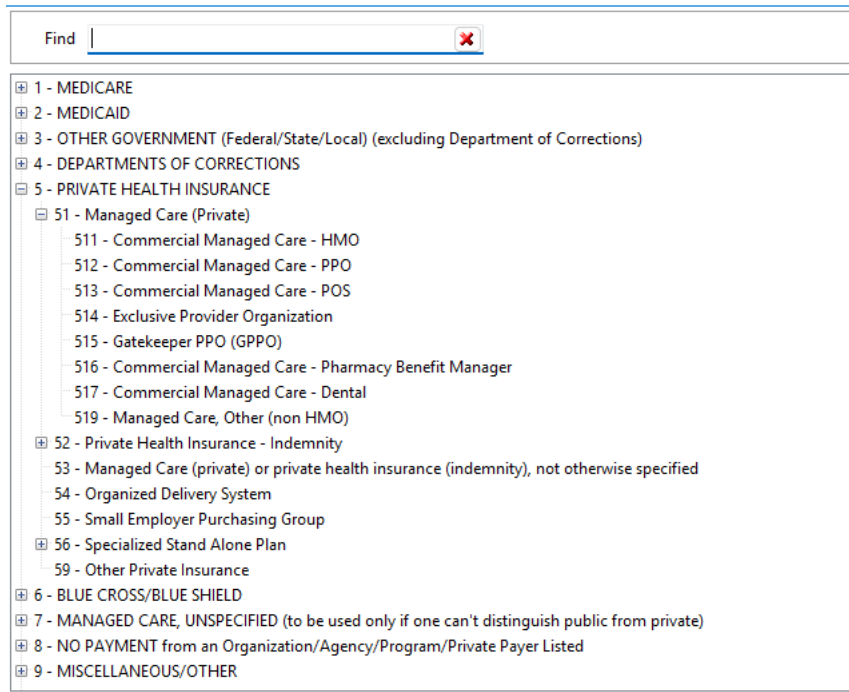


Figure 38. Source of Payment Selection window

## DocMan

DocMan has been updated so that existing files that have zero size will show the following message:

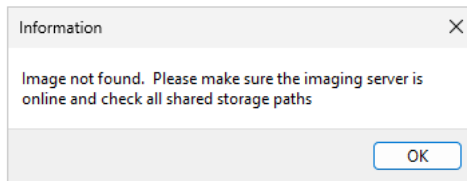


Figure 39. DocMan Information window



## Chapter 2 - Resolved Issues

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

Item Number	Description
840331298	Insurance Phone Number (180686)
840387181	Can't edit an existing Care Plan Details (205723)
840197411	Provider's NADEAN number is removed from the Licensure tab when canceling changes to their demographics. (13755)
840196940	Privileges > Rx Worklist is accessed for a user with 'Dashboard Rx Worklist' privilege access denied (14454)
840196872	Chart > Health Summary > Not able to change the size of a container window if it is expanded off of the screen even after a User Preference script is run for the Health Summary (91811)
851	Demographics > Chart Cover > All guarantor addresses print on chart cover
840415045	HCPCS code G0439 not flagged correctly for 'CMS2: Preventive Care and Screening: Screening for Depression and Follow-Up Plan' (216472)
840386173	CGM Pay still queries for saved tokens even for insurance payments (196856)
840398414	Patients with listed sexual orientation show in CCDA with gender as "Unknown" (211617)
840196754	Bill > Posting > Capitated fees aren't being adjusted off automatically (4619)
840381858	Document Repair Utility: Missing ISP2003.DLL (203416)
208130	Multiple API requests coming in for individual CSI requests due to TRN 02
222285	Process Server not performing the crash recovery, since the thread pool optimizing was done.
113765	CMS 138 - Only Unknown smoking status appears on CCD
840431069	Forms and Letters with duplicate Application Fields only insert data into the first field in the form (218854)
840197015	Tracking Board > Users with All Schedule Privileges Denied Can Reschedule Appointments (997)

840197264	Rule Manager > Health maintenance rule overlooking BMI in vitals flowsheet when calculated in a visit note (1023)
840196506	TFS 95140 Bill > Posting > "Patient" field shows wrong patient name (4590)
840196909/ 00819226	Chart>Visit Note>Assessment>Changing the ICD description by right click > properties causes error when concluding visit note. (4637)
13528	Chart > Unable to launch Lab Tracking from document view if no pending orders exist
840197629/ 00973532	Beta > Dashboard Icons > Taskman and Tracking Board dashboard icon active colors not displayed (13746)
13848	Chart > Demographics > Patients > Home address is being saved as a business address
840196943	Chart > Visit/HS > Unable to edit Problems in Problems List if Confidentiality is on (13891)
840197403	Chart > Visit Note > Error 'String or Binary Data would be truncated' when changing Dx description in the Assessment properties (13894)
840197464	eMDs Prescribe > Prescribing Samples > Error on samples when decimal is entered (14460)
840197531	Integer Overflow error message when trying to edit or activate/Inactivate the Lab Tracking Rule (93515)
111509	Chartview>Medications: Medication History: The check box is not being added to script or sample
114382	Demographics Audit>Audit is not capturing the Patient_ID for all transactions
840214664	DocMan sorts only one page at a time for patients with multiple pages of documents (136679)
840222109	CGM Prescribe: Deleted Vitals are being displayed. (139467)
840251476	Error when filtering on Bill > Posting screen (149712)
840331330	Bill Visit Window Visits Filters Error (180687)
840337112	Chart > Vitals calendar does not display properly during print (183985)
840196945	Bill > Invoice > Deleting one CPT code causes another CPT code to be replaced by an unknown, incorrect code with an "LL" modifier (17628)
113148	Free text box in chart doesn't show font changes when using mouse scroll
840345517	Refilled medications still display as a [Queued Refill] after being sent (187120)

840441217	Help menu error (219316)
840197362	Bill > Superbill > Superbill tab greys out (126670)
840197632	Chart > Care Plan > Unable to edit/remove Care Team (4583)
840197575	When selecting the info button next to an ICD/medication in the visit/HS, Merck manual is opening a general window (13727)
13779	CCD > Confidential Medication > Text reads "Confidential Problem information has been excluded..."
840196614	Access violation when unchecking and rechecking ROS in Chart (13807)
17367	CCD > Exclude Confidential Info > Confidential Order > Code displays under "Plan Of Treatment"
840197082	Chart > Visit Note > Plan > E&M Coder 2021 Standard > Time > Base E&M Code is automatically de-selected once the number of minutes exceeds 74. (121071)
142010	Pre-clicks cause AV error when used in Care Plan
219754	HCPCS converted to CPT codes appear with the wrong code system on the CCD
840441587	Scheduled Payment Plans are not processed (222097)

