



The Power Play for Practice Management

| New Features | Added from 2016*-2022* | 2023* | 2024* | 2025 | 2026 |
|---------------------------------------------------------------------------------------------------|------------------------|-------|-------|------|------|
| Flexible, online patient appointments and scheduling | | | | | ✓ |
| Improved patient search with patient insurance ID look-up | | | | | ✓ |
| Improved AR tracker | | | | | ✓ |
| QR code on statements for online patient pay† | | | | | ✓ |
| Electronic attachments for workers' comp and auto claims† | | | | | ✓ |
| Integrated CGM PAY** functionality and dashboard for credit card and ACH; automated payment plans | | | | ✓ | ✓ |
| Enhanced Patient Responsibility Estimate helps self-pay and uninsured patients† | | | | ✓ | ✓ |



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|----------------------------------------------------------------------------------------------------------------------|------------------------|-------|-------|------|------|
| Customizable charge-entry workflow warns of date-sensitive entries and outdated codes; copies messaging rules easily | | | | ✓ | ✓ |
| Smarter, expanded search capability for transaction references | | | | ✓ | ✓ |
| Patient insurance history | | | | ✓ | ✓ |
| Duplicate charge warnings for same DOS and provider | | | | ✓ | ✓ |
| Fully integrated patient statements† | | | ✓ | ✓ | ✓ |
| More detailed eligibility display† | | | ✓ | ✓ | ✓ |
| 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 | | ✓ | ✓ | ✓ | ✓ |
| 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 | ✓ | ✓ | ✓ | ✓ | ✓ |



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|----------------------------------------------------------------------------------------------------------------|------------------------|-------|-------|------|------|
| 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 | ✓ | ✓ | ✓ | ✓ | ✓ |
| 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 | ✓ | ✓ | ✓ | ✓ | ✓ |
| 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) | ✓ | ✓ | ✓ | ✓ | ✓ |
| 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 | ✓ | ✓ | ✓ | ✓ | ✓ |



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|-------------------------------------------------------------------------------------------------------------------------------------|------------------------|-------|-------|------|------|
| Patient balance field on custom displayed and printed appointment schedule | ✓ | ✓ | ✓ | ✓ | ✓ |
| Mobile app enhancements: permanent diagnosis for patient preview, edit appts, add'l insurance info, middle initials, facility codes | ✓ | ✓ | ✓ | ✓ | ✓ |
| Ability to default NDC codes in charges and payments | ✓ | ✓ | ✓ | ✓ | ✓ |
| Accounts Receivable Tracker for working AR balances | ✓ | ✓ | ✓ | ✓ | ✓ |
| Expanded functionality and Patient Intake tool for CGM LYTEC Mobile | ✓ | ✓ | ✓ | ✓ | ✓ |
| Customizable coding edits | ✓ | ✓ | ✓ | ✓ | ✓ |
| Claim status verification with electronic response from clearinghouse | ✓ | ✓ | ✓ | ✓ | ✓ |
| Workflow to easily move credits | ✓ | ✓ | ✓ | ✓ | ✓ |
| Customized printable appointment schedules | ✓ | ✓ | ✓ | ✓ | ✓ |
| Insurance timely filing calculator | ✓ | ✓ | ✓ | ✓ | ✓ |
| Advanced duplicate patient record matching | ✓ | ✓ | ✓ | ✓ | ✓ |

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Contact your representative to learn more

* CGM LYTEC versions prior to 2025 are no longer supported by the developer

** Priced separately

† When combined with eMEDIX, the only fully approved and supported clearinghouse for CGM LYTEC

