UPGRADE MATRIX

CGM LYTEC
Practice Management and EHR



New Features	Added from 2016-2023*	2024*	2025*	2026	2027
Assignment of AR status codes directly within an ERA					✓
Default provider assignment on a schedule resource					✓
Auto-check of patient responsibility lines when posting a secondary remit					✓
Links to prepays directly from charges and payments					✓
Patient images accessible directly from the schedule					✓
Revenue Management window sizes and positions remembered between logins					✓
Credit card surcharges through integration with CGM PAY**				✓	✓
Flexible, online patient appointments and scheduling				✓	✓

Synchronizing Healthcare

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	Added from 2016-2023*	2024*	2025*	2026	2027
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†			✓	✓	✓
Customizable charge-entry workflow warns of date-sensitive entries and outdated codes; copies messaging rules easily			✓	✓	✓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		✓	✓	✓	✓
Auto-creation of pending transactions from completed appointments	✓	✓	✓	✓	✓
Ability to make appointment resources inactive	✓	✓	✓	✓	✓

	Added from 2016-2023*	2024*	2025*	2026	2027
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	✓	✓	✓	✓	✓
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	✓	✓	✓	✓	✓
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	✓	✓	✓	✓	✓
Assign agent, task, and due date from Charges & Payments screen	✓	✓	✓	✓	✓
Custom color coding for quick identification of patient types in patient lookup grids	✓	✓	✓	✓	✓

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Practice Management and EHR

	Added from 2016-2023*	2024*	2025*	2026	2027
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	✓	✓	✓	✓	✓
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	✓	✓	✓	✓	✓
Accounts Receivable Tracker for working AR balances	✓	✓	✓	✓	✓
Expanded functionality and Patient Intake tool for CGM LYTEC Mobile	✓	✓	✓	✓	✓
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

Name

Phone

Email

* CGM LYTEC versions prior to 2026 are no longer supported by the developer
** Priced separately
† When combined with eMEDIX, the only fully approved and supported clearinghouse for CGM LYTEC

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