CGM LYTEC 2026 Release Notes

December 2025

Copyright notice

Publication date

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Product

CGM Lytec 2026

Table of Contents

Chapter 1 - Enhancements

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

Windows 10 - End of Support

As of October 14, 2025 (version 22H2), Microsoft ended support for Windows 10 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.

Important!

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 Lytec 2024 and are upgrading to CGM LYTEC 2026, it is recommended you upgrade to CGM LYTEC 2025 first, then register and convert your practice data. Then, from CGM LYTEC 2025, upgrade to CGM LYTEC 2026.

New Features

Features requiring setup before use

Feature	Setup Items
InteliChart Integration	• Sign up with InteliChart • Setup Providers, Resources, Facilities • Enable InteliChart Interface Connection • Set up InteliChart Options at InteliChart website

InteliChart Integration

CGM LYTEC 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 LYTEC and InteliChart, all your Practice information, active non-deceased patients, providers, facilities, appointment reasons and resources will be uploaded to InteliChart.

Several updates have been made in CGM LYTEC for interfacing with InteliChart.

Updated Wait List

There is a new check box on the Wait List: Show Online Requests Only. Select this check box if you want to see only requests made online through InteliChart.

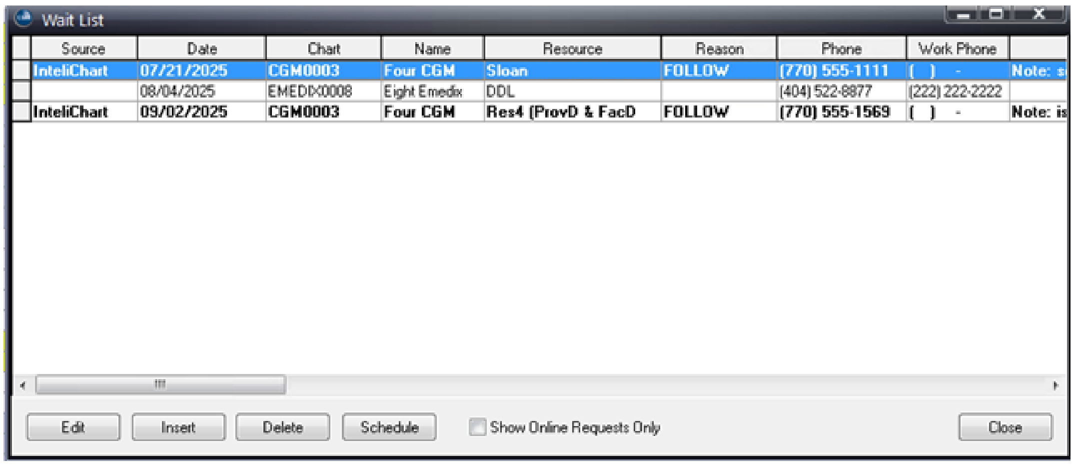


Figure 1. Wait List

A new Source column has been added automatically to the Wait List.

New Source column

You can add the Source column to the grid and Detail view.

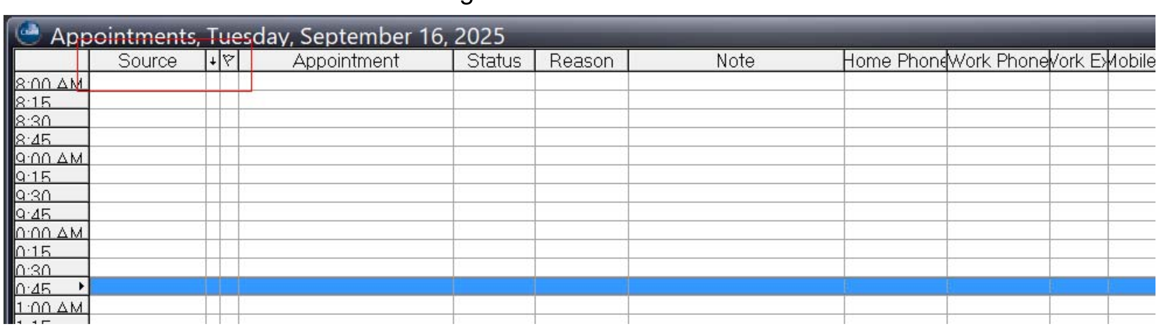


Figure 2. Appointment grid

To add the Source column

1. Open the Appointment grid and select Schedule Layout from the Appointment drop-down menu. The Edit Layout screen opens.
2. Click Appointment in the Table section at the top left.
3. Scroll to Source in the Field section on the bottom left.

4. Select the check box for Source.
5. Click the Add button. The column is added to the list of columns. Use the Up button to move it to the position you want it.
6. Click OK.

In addition, you can add the Source column to the Detail view at the top of screen. To do so,

1. On the Appointment grid, click the Appointment drop-down.
2. Select Appointment Detail > Layout. The Edit Layout screen opens.
3. Click Appointment in the Table section at the top left.
4. Scroll to Source in the Field section on the bottom left.
5. Select the check box for Source.
6. Click the Add button. The column is added to the list of columns. Use the Up button to move it to the position you want it.
7. Click OK.

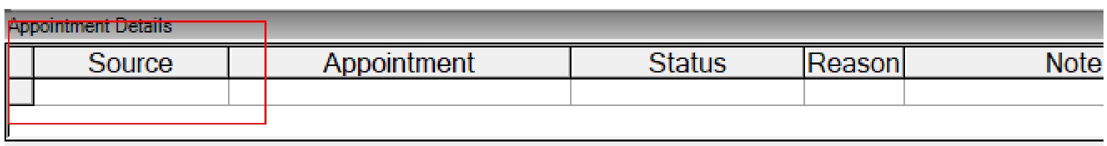


Figure 3. Appointment Details

Updated Logo functionality

When appointment requests come over from InteliChart and are added to the Wait List, the L logo will flash and there will be a new option in the list: Notifications. Click the Notifications link for information on the items.

If you click the L and then click Notifications, a Notifications window will open displaying that Waitlist items have been added. You can highlight the message and double-click to open the waitlist or choose the option at the bottom. Once the Wait List opens, this notification is marked as read; but you can always check Show Read Items to see the date/time of the last notification. Once the Waitlist is open, the L will stop flashing until the next time one is added.

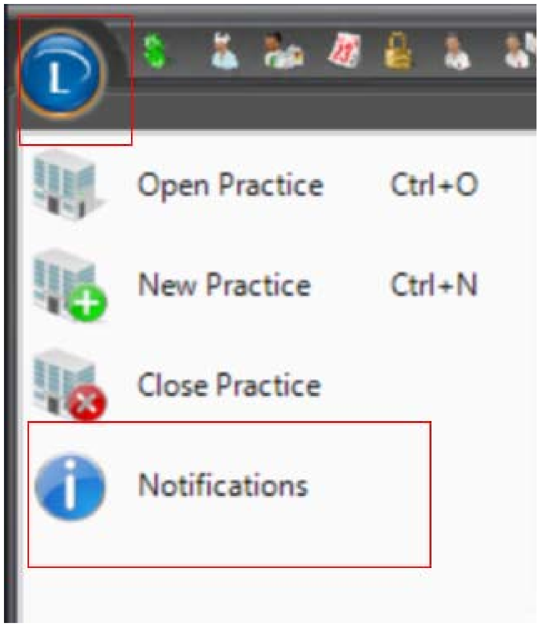


Figure 4. Practice drop-down

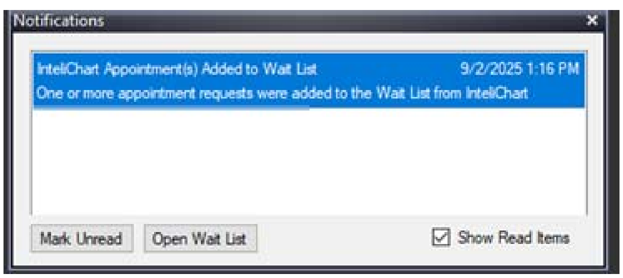


Figure 5. Notifications screen

Updated Resource Options

There is a new option on the Resource Options screen: Limit Online Appointments to. Use this check box to limit the number of appointments allowed per slot when booking an appointment online.

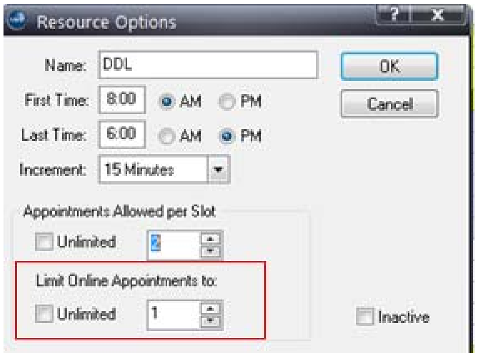


Figure 6. Resource Options screen

Updated Interface Configuration menu

New Option

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

Figure 7. Interface Configuration menu

New InteliChart Interface Configuration screen

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

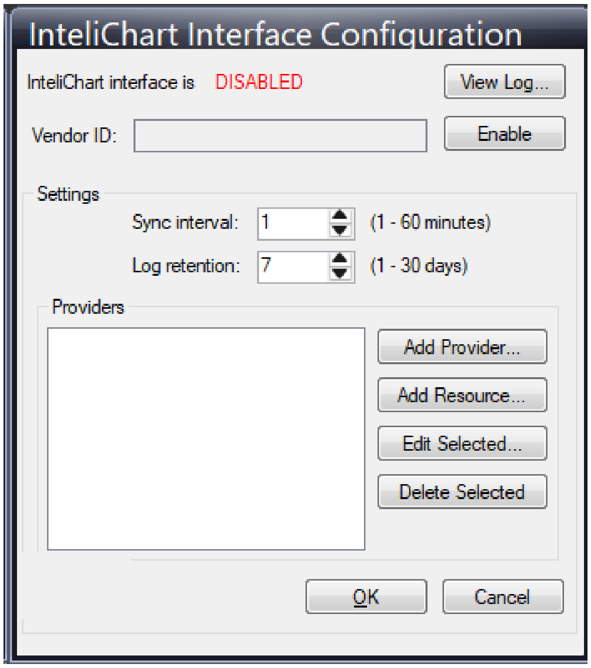


Figure 8. InteliChart Interface Configuration screen

The system needs to know what Providers and Location options to show when the patient searches for appointments and it needs to know what CGM LYTEC Calendar Resource to place the appointment on.

For Configuration setup you will:

Look at each of your Calendar Resources and determine which provider it is for. Add the first provider to the configuration screen and then you must select which resource it is tied to. If you have one office only that is all that is needed. The system will use your Practice information as the Facility/Location for this Resource.

If you have multiple facilities, then you will also select a facility.

Note: If you have more than one office, you will need to set up your main office (practice information) as a facility in the facilities list so you can select it here for the appropriate resource.

If the provider you just added is also used on another resource, with the Provider highlighted, select Add Resource and select the resource. Add Facility. A provider cannot be on more than one Resource without also adding facilities. Since the system needs to know on which Resource to place the appointment, each needs to be unique.

Once you have added all resources for that provider, select the next provider and repeat this process.

Once you have completed the synchronization of everything from CGM LYTEC to InteliChart and complete InteliChart provider setup, you will see the Intelichart Resources for each provider. There will be one for each Resource/Facility (Location) combination.

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. 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. Note: You must add providers in the InteliChart Admin Portal as well.
Add Resource button	Click this button to add a resource and facility. You will be able to select both a facility and resource. Resource is required. Facility is optional based on your practice needs.
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. Important: Once a provider is removed from here, you will also need to deactivate them in InteliChart. If a removed provider is not deactivated in InteliChart, the customer will continue to be billed. (More information on this will be provided when you have your InteliChart training)
OK	Click this button to save changes.
Cancel	Click this button to close the screen without saving any changes.

Enabling the Interface

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

1. On the Admin ribbon menu, select Interface Configuration and then InteliChart. The InteliChart Interface Configuration screen opens.
2. Specify a Sync Interval and Log Retention time.
3. Click Add Provider. Select a provider and click OK.

a. With Provider highlighted, select Add Resource and select a resource. If there is also a facility, select that.

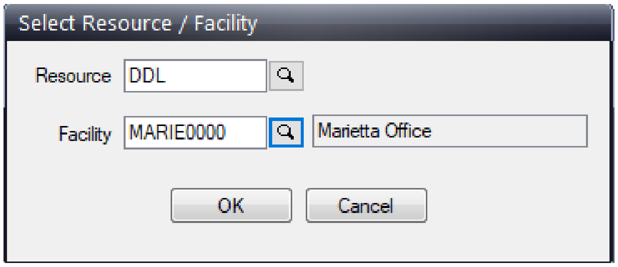


Figure 9. Select Resource/Facility screen

b. If this provider has another resource for scheduling, repeat this process to add the next resource or resource/facility combination.

4. Repeat for all providers.
5. Click the **Enable** button. The Enable InteliChart Interface screen opens.

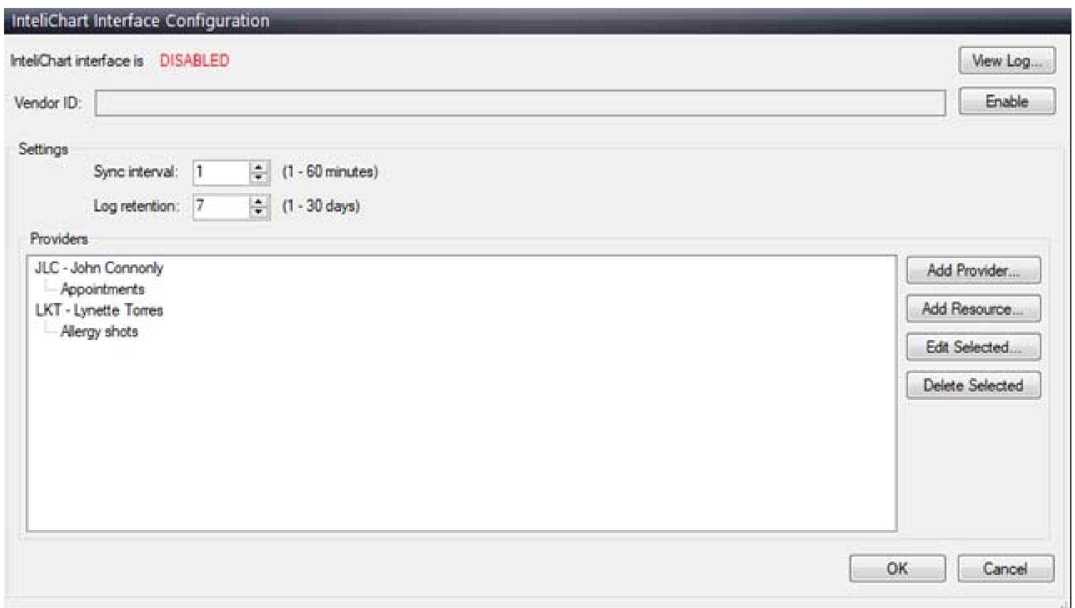
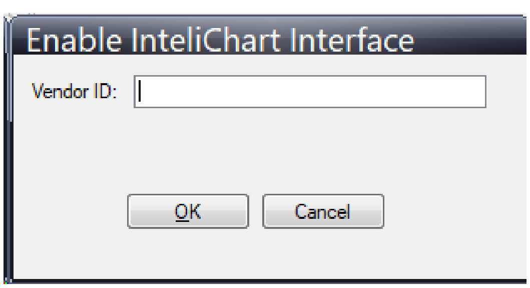


Figure 10. InteliChart Interface screen

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



7. Click **OK**.

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 “” on page 5).
2. Log in to InteliChart. Your practice should be there.

Figure 11. List of Practices

3. Select Enterprise level.
4. Select User Administration in the left panel,
5. Select Roles.
6. Highlight Enterprise Admin in the center panel and select Share this role with all practices in the right panel.

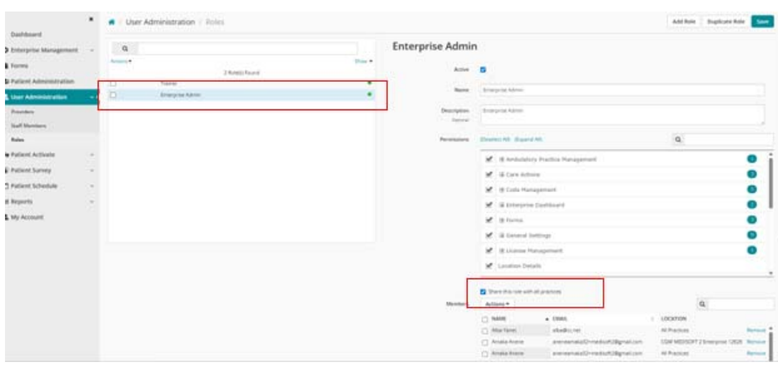


Figure 12. Enterprise Admin screen

7. Switch to practice level.

8. Select User administration > Providers, and click Add Provider.

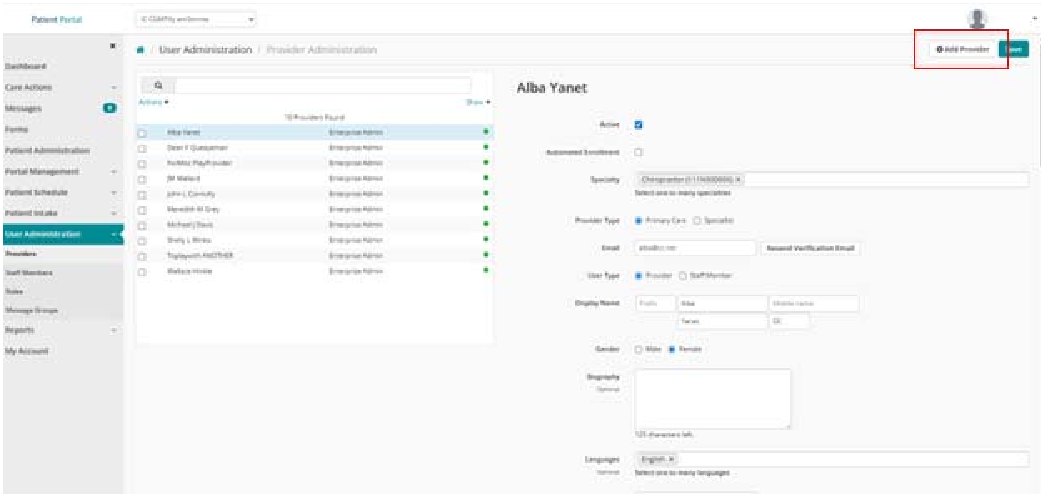


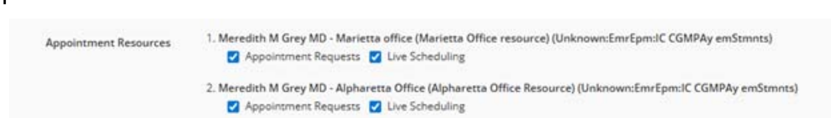
Figure 13. Add Provider

9. 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.

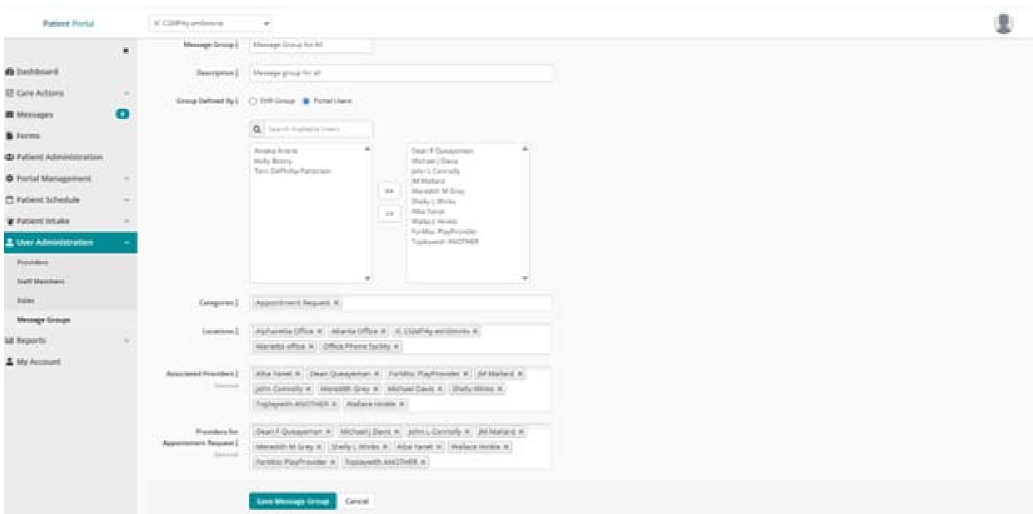


- Accepting new pts--set to No.
- Permissions - Select All.

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.

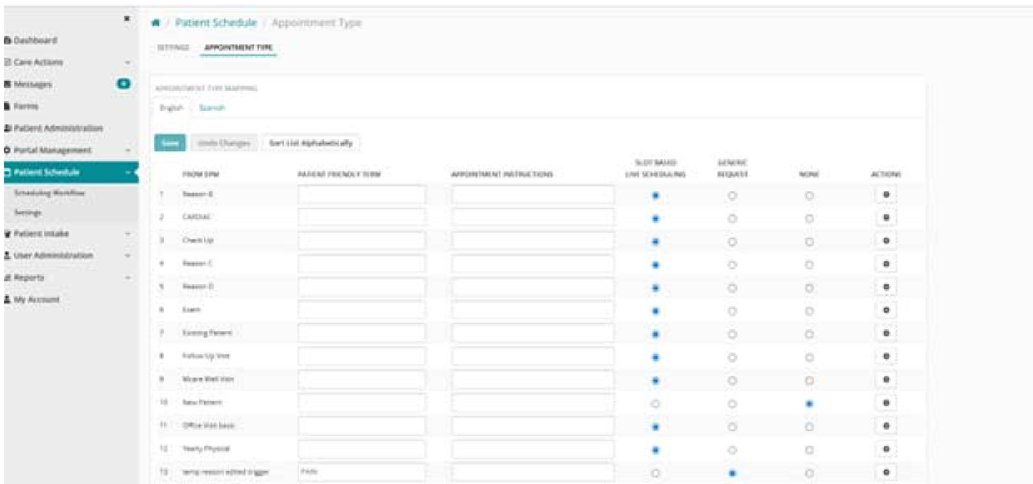
You can come back to this after adding all the remaining providers.

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.



   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 LYTEC. 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 LYTEC.

Select time zone and daylight saving time options as applicable.

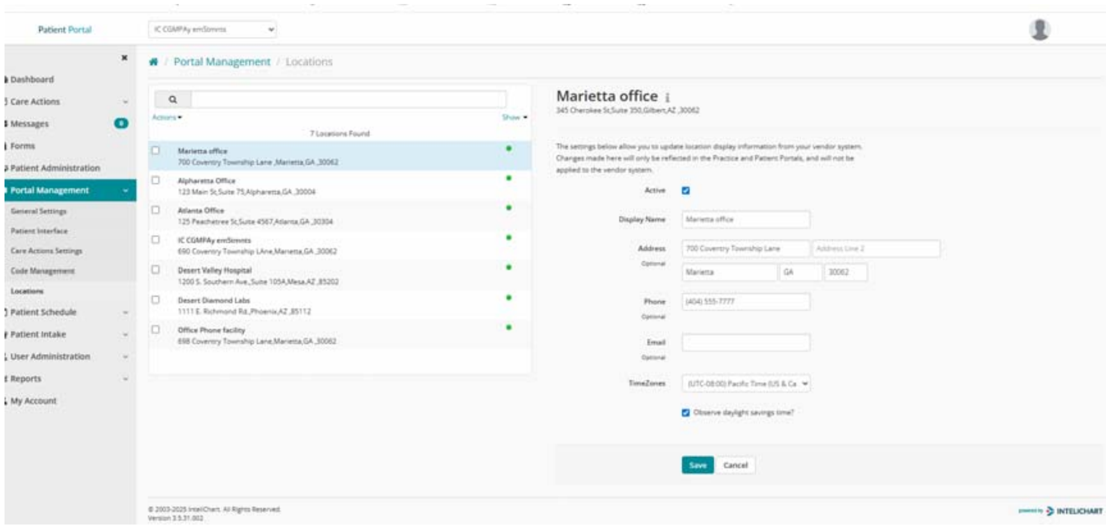


Figure 14. Portal Management

Other Setup

1. Select Patient Administration from the left panel.
2. Search for a patient to verify one is there from the sync.
3. Switch to Enterprise level.
4. Select Portal Management from the left panel.
5. Select Care Action Settings and then the Appts tab.
6. 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 InteliChart 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.

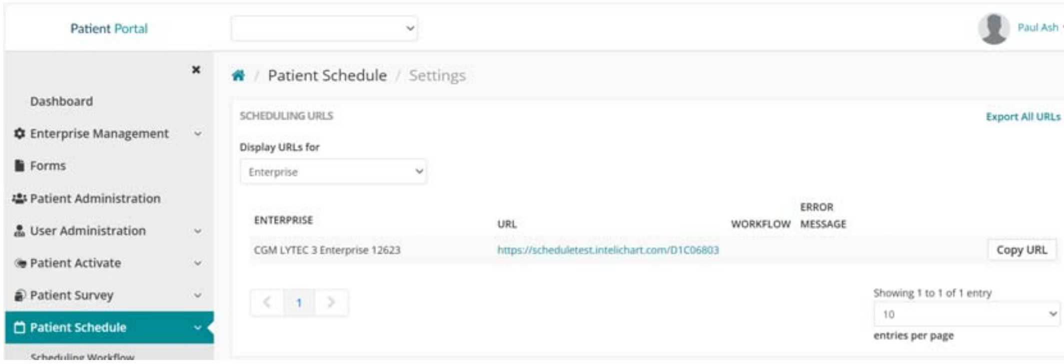


Figure 15. Schedule Settings page

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.

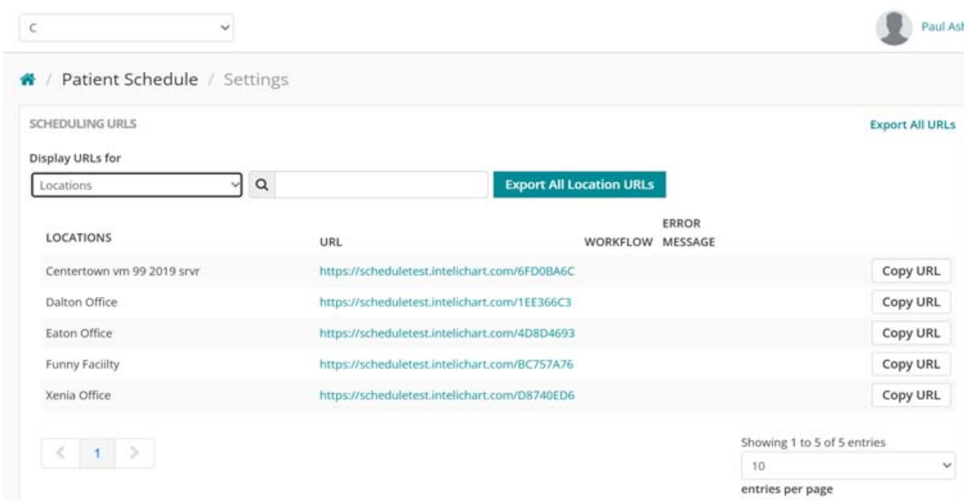


Figure 16. URLs by Location

- Provider displays that provider and locations they go to.

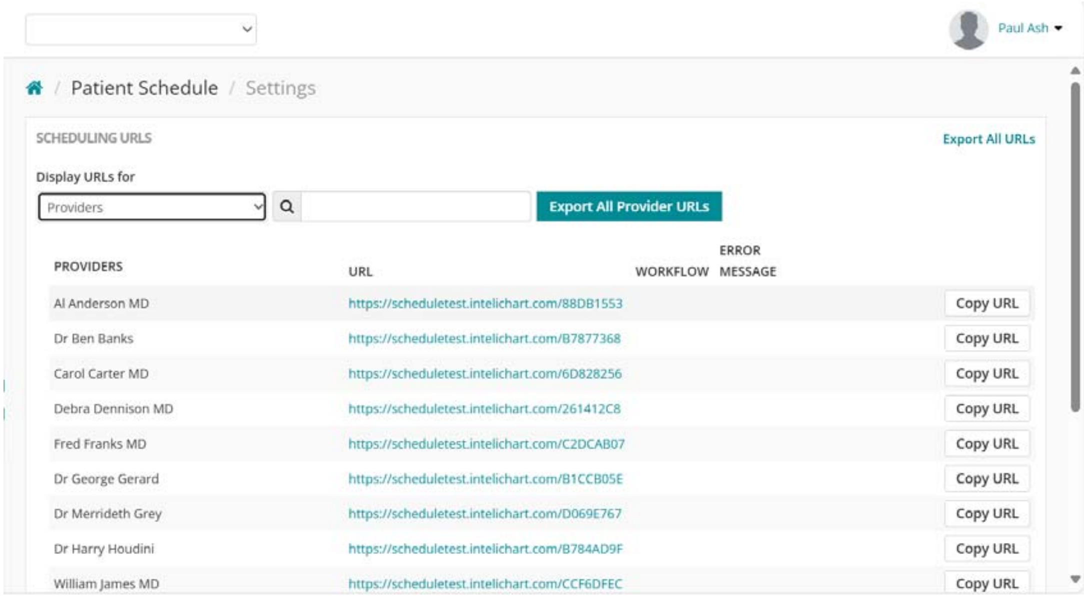


Figure 17. URLs by Provider

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.

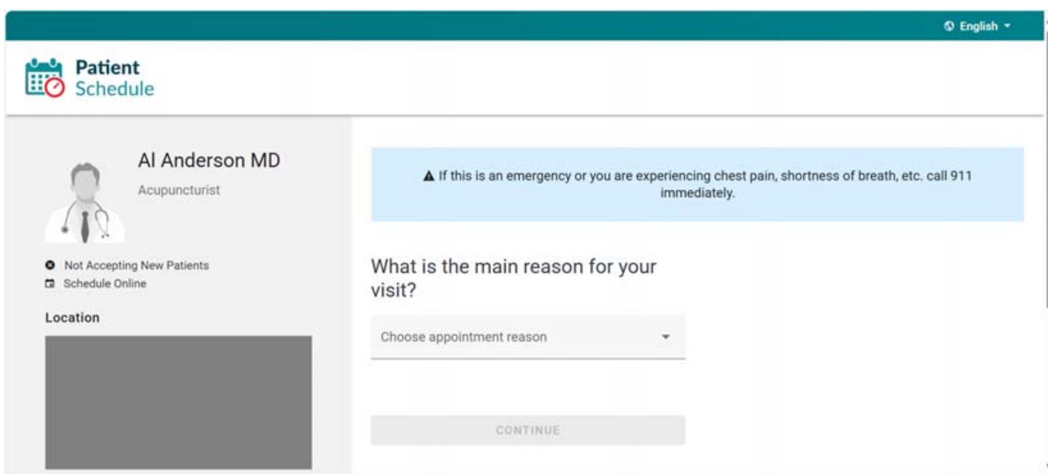


Figure 18. Patient Schedule by Provider

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 InteliChart identifies the patient, the patient can submit the appointment and it will display on the CGM LYTEC appointment 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.

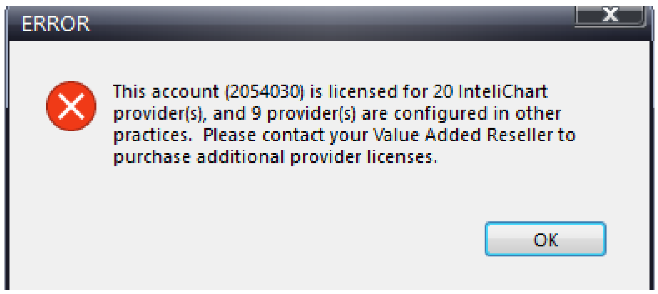


Figure 19. Error message

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.

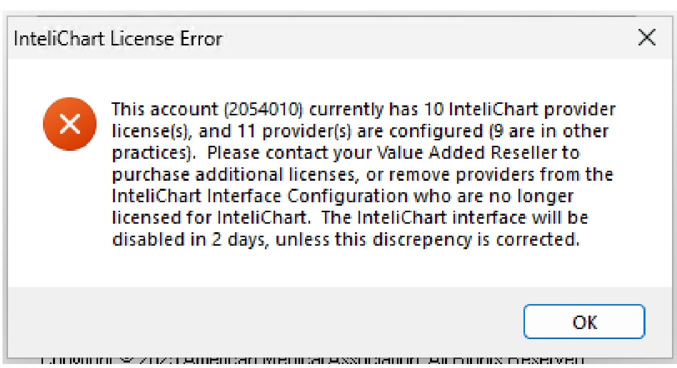


Figure 20. InteliChart License Error

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.

Patients

Updated Patient Search

You can now search for a patient by their Insured ID Number. There is a new option on the Search by drop-down: Insured ID Number. Select this option and enter the ID number you are searching for. The application searches all 3 insured ID number fields (primary, secondary, tertiary). If you have your Filter Type set to None, it won't show anything in the list until you enter a complete matching insured ID number.

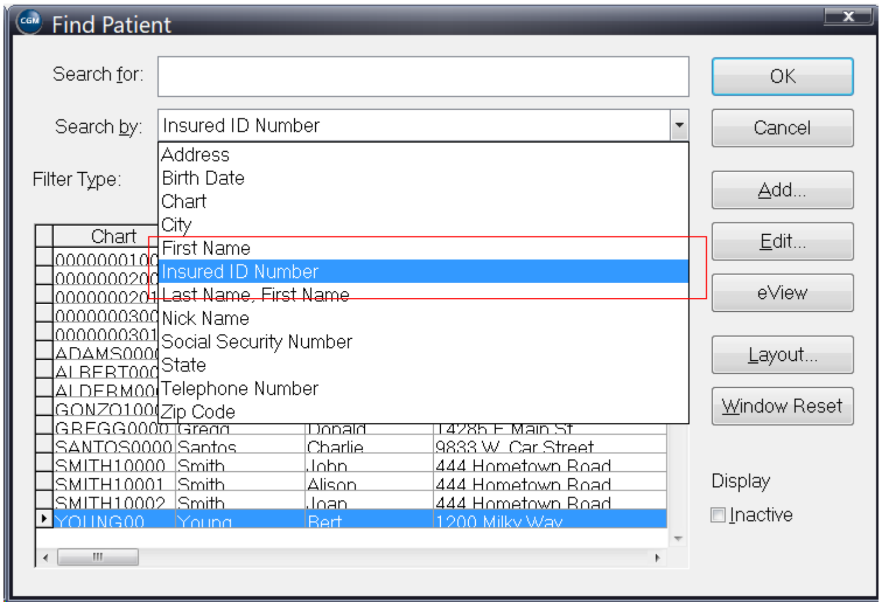


Figure 21. Find Patient screen

AR Tracking

New check box

There is a new check box on the AR Tracking screen: Run at Startup. Select this check box if you want the AR Tracker to run the current filter selections when AR Tracking is launched. This is the default setting to match existing functionality. If you do not want the AR Tracker to run the filter selections at startup, clear the check box. If this is not checked, the filter screen will open first before running populated with your last filter selections.

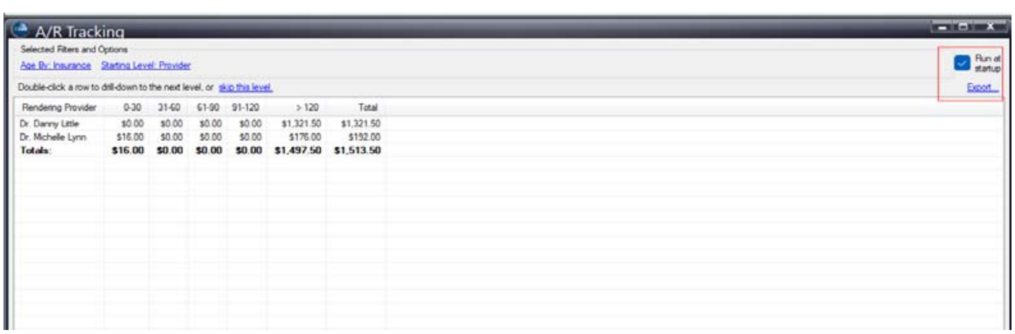


Figure 22. AR Tracking

Chapter 2 - Resolved Issues

The following issues were resolved with CGM LYTEC 2026.

Salesforce ID/ PBI	Application	Description
176381	Appointments	CGM LYTEC will no longer allow booking a single appointment past midnight. Previously, the system would freeze if you had appointments past midnight. Steps to recreate 1. In CGM LYTEC, create an appointment that extends past midnight. 2. Verify that the system does not allow booking.
00910068/ 67887		When selecting a specific printer in the Custom Form setup, the selection will now be retained. Steps to recreate 1. In CGM LYTEC select Reports > Custom Reports. 2. Select Design Custom Reports. 3. Select File > Edit Custom Reports. 4. Select a report. 5. Select Options > Setup. 6. In Custom Form Setup, select Printer. 7. Select Use this printer; then select Select. 8. Select the drop-down arrow and select the desired printer. 9. Select OK, then OK, and OK. 10. Close the Custom Form and save changes. 11. Select Reports > Custom Reports. 12. Select Print Custom Reports. 13. Select the same report and select Open. 14. Select Print and verify the same printer from the earlier steps has been retained.