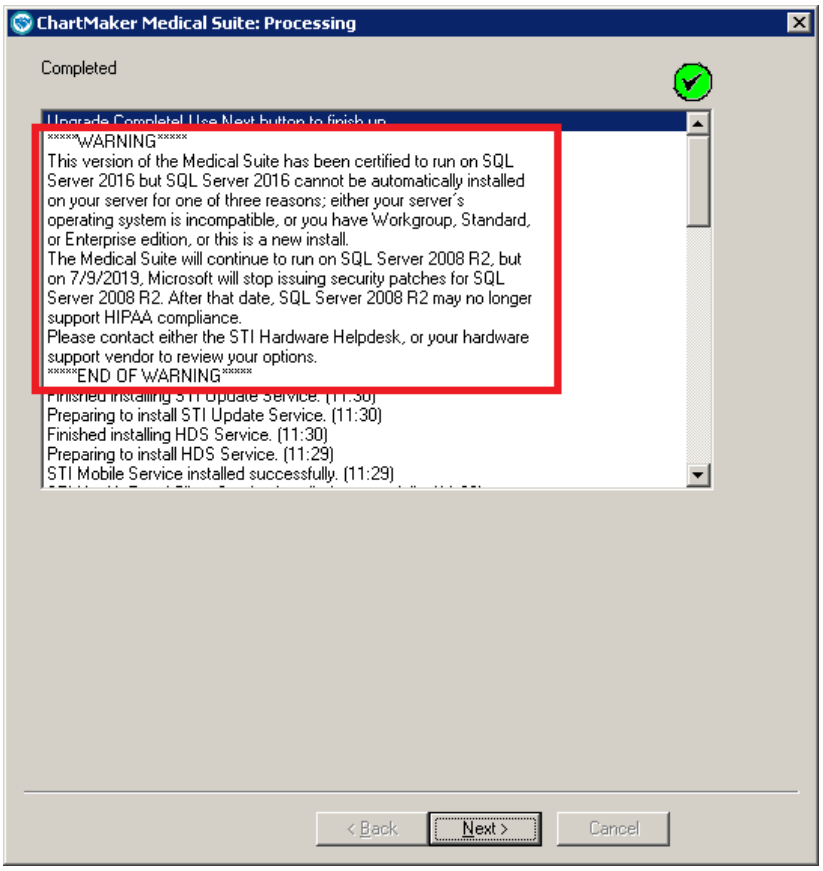
ChartMaker® Clinical Release Notes

ChartMaker® 2022.1 (fv6.7.1)

Important Notifications

- **Upgrade from Microsoft Server 2008/2012 and Windows 7/8 –** Since January 2020, your **Windows 7/8** workstations and **Microsoft 2008 Servers** are no longer supported. Likewise, support for **Windows 8.1** will end on January 10, 2023, and support for **Windows Server 2012/2012R2** will end on October 10, 2023. Even with security patches, **problems may still arise** if you choose not to upgrade. In addition, your workstations are not HIPAA compliant. To avoid these issues, contact our **Technical Services Department** today.

- **SQL Server 2016 & the ChartMaker 2018.2 (File Version 6.3.3) Upgrade –** Beginning with ChartMaker 2018.2 (File Version 6.3.3) Upgrade, a warning message will appear upon the completion of the upgrade regarding the transition of the ChartMaker Medical Suite to using SQL Server 2016, for those offices where an automated upgrade to SQL Server 2016 was not possible. See the figure below. If you are receiving this message, to avoid potential issues and to ensure your system remains HIPPA compliant, it is important to contact either STI Hardware Helpdesk, or your software vendor, to review your options.



ChartMaker Medical Suite SQL Server 2016 Warning

Added Features

- **Direct Messaging – Generate and Attach CDA –** The Continuity of Care Document (CCD) that is generated when sending a direct message has been updated to include any **Blood Pressure 2** information and any applicable **BMI Options** (Follow-Up plan documented, Follow-Up plan not done for medical or other reason, Provided counseling for nutrition, Provided counseling for physical activity, etc.), as well as any corresponding SNOMED codes, that were configured in the Vitals widget for a patient.

- **Export – Export Patient Data –** The system has been updated to include any **Blood Pressure 2** information and any applicable **BMI Options** (Follow-Up plan documented, Follow-Up plan not done for medical or other reason, Provided counseling for nutrition, Provided counseling for physical activity, etc.), as well as any corresponding SNOMED codes, that were configured in the Vitals widget for a patient, when generating CCDA files for export.

- **Export – Export Patient Data –** In previous versions, an issue could arise when exporting patient data for a date range, where the Cognitive Status section of the CDA file will be missing information that should be included. This issue has been corrected.

- **HIE Export –** The system has been updated to include any **Blood Pressure 2** information and any applicable **BMI Options** (Follow-Up plan documented, Follow-Up plan not done for medical or other reason, Provided counseling for nutrition, Provided counseling for physical activity, etc.), as well as any corresponding SNOMED codes, that were configured in the Vitals widget for a patient, when generating CCDA files for export.

- **Template Editing – Lookup –** The Lookup Properties dialog has been updated with a new **Gender Identity** option in the Fields list when the Source is **Patient**. This option allows you to insert the patient's gender identity information into chart notes and letters as needed. See Figure 1.

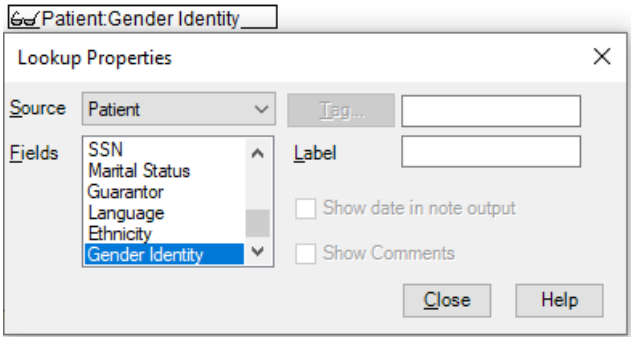


Figure 1 – Template Editor – Lookup Properties

- **Title Bar –** The title bar in Clinical has been updated so that when a patient's chart is open, their **Birth Sex** and **Gender Identity** will appear next to their Date of Birth and Age. See Figure 2.

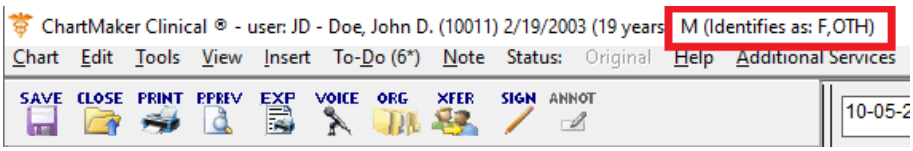


Figure 2 – Title Bar

Added Features (continued)

- **The To-Do List — Patient –** The **Patient** column in the To-Do List, as well as the Floating To-Do List (**To-Do** > **View To-Do List**), has been updated to display the patient's middle initial, allowing you to easily distinguish patients with the same first and last names. See Figure 3.

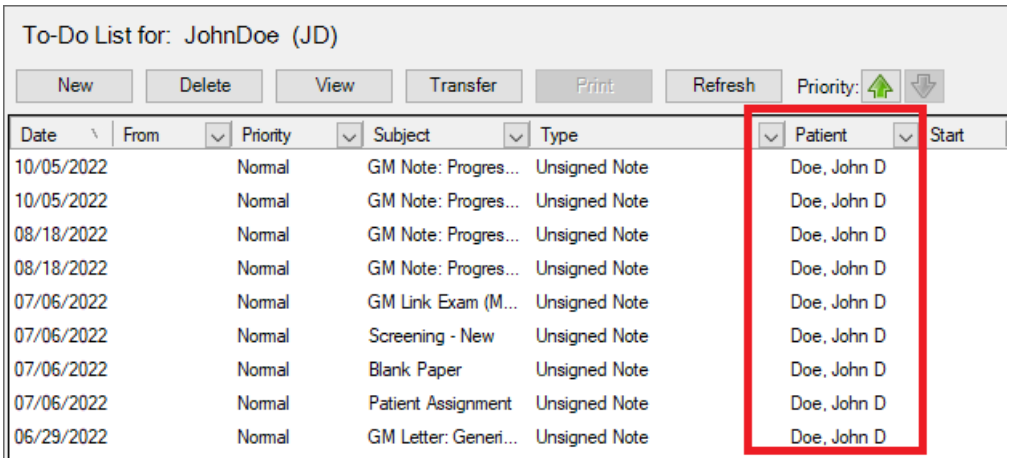


Figure 3 – The To-Do List

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ChartMaker® Practice Manager Release Notes

ChartMaker® 2022.1 (fv6.7.1)

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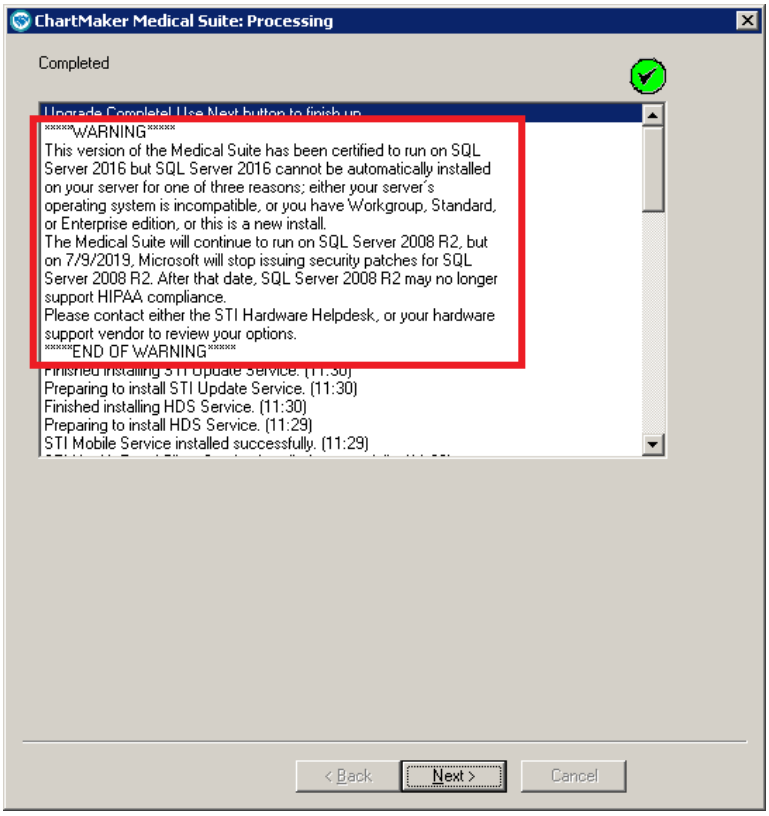

ChartMaker Medical Suite SQL Server 2016 Warning

General

- **The To-Do List –** The **Patient** column in the To-Do List (accessed via **To-Do** > **View To-Do List**), has been updated to display the patient's middle initial, allowing you to easily distinguish patients with the same first and last names. See Figure 1.

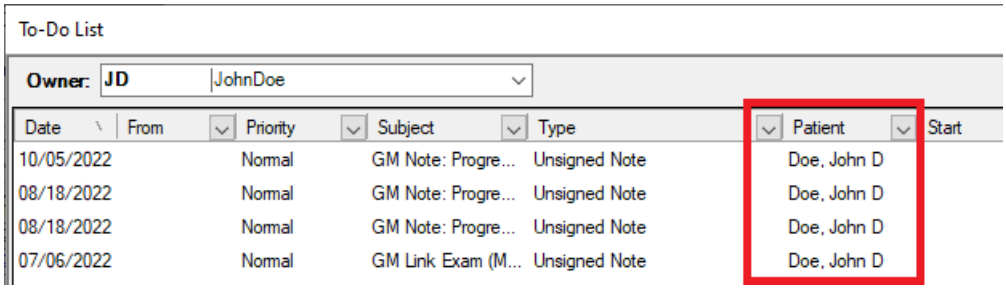

Figure 1 – The To-Do List

Patient Billing

- **Patient Billing – Electronic Patient Statements –** In previous versions an issue could arise when an Electronic Patient Statement file was formatted incorrectly, thereby causing incorrect patient data to print on the statements. This issue has been corrected.

Reports

Daily Reports

- **Payment Edit → Long/Short –** In previous versions an issue could arise when printing or previewing a Payment Edit report where the original payment posted is displaying the incorrect payer. This issue arises when a payment is made to a closed charge causing the original payment to display the incorrect payer. This issue has been corrected.

Clinical Reports

- **Clinical Immunizations → Standard –** In previous versions an issue could arise when using the **Patient Age** select criteria where a "**Setting the selection formula failed. Report may include extra records.**" error message would be generated. This issue has been corrected.

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