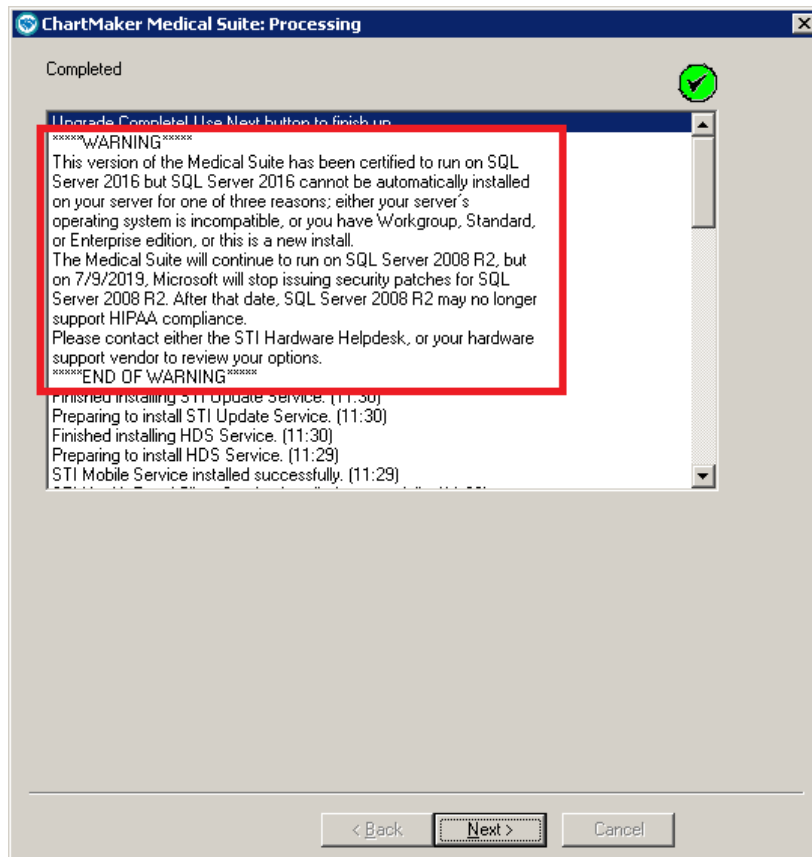


ChartMaker® Clinical Release Notes

ChartMaker® 2022.1 (fv6.7.7)

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 HIPAA 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

- **Audit Trail** – The Audit Trail has been updated to track whenever a scanned document is sent to another user via the **Sent to** option in the Scan Management dialog. When an audit event occurs, the Event column will display **Scan**; the Group column will display **Note**; the Audit Trail Description will display **PHI Import [Header]**; the New Value will display **Send to [User ID]**; and the Metadata column will contain the **Account ID, Note ID, and Visit Date.**⁸
- **Decision Support – Alert Manager** – The Alert Manager dialog has been updated so that whenever it is accessed, it will open with an increased width allowing you to easily address the alert without having to scroll to the Addressed checkbox. See Figure 1.

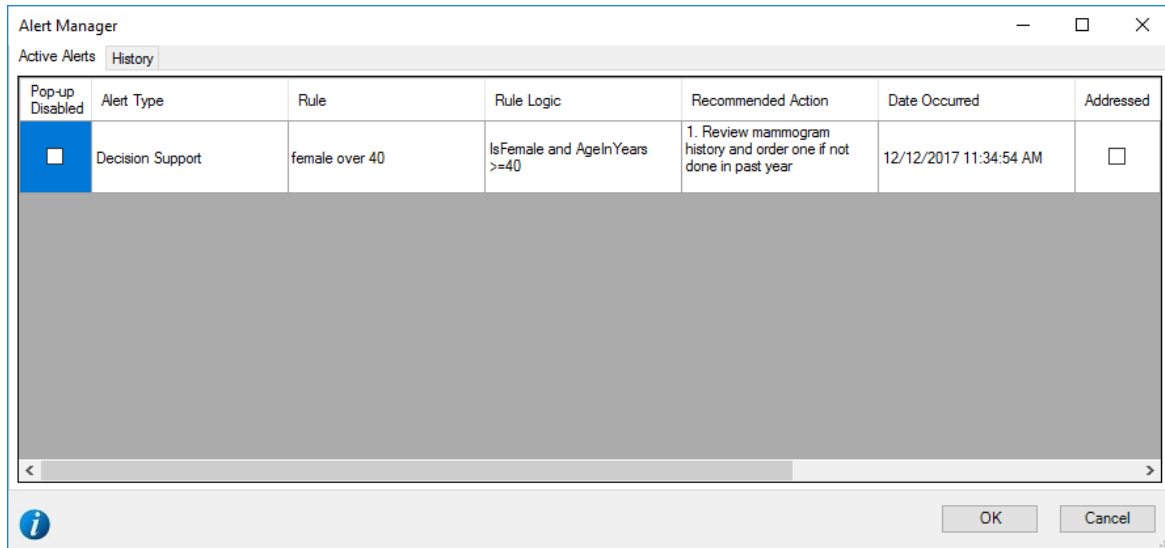


Figure 1 – Alert Manager

Added Features (continued)

- **Electronic Health Information Export** – To adhere to the Electronic Health Information (EHI) export requirements for the 21st Century Cures Act (21CCA), the system has been updated with a new **Electronic Health Information Export** dialog (accessed via **Chart > Export > Electronic Health Information Export**) that allows you to export all patient data for an **Individual Patient**, or for the entire **Patient Population**. See Figure 2. Access to this dialog is limited to those users that have a **Patient Data Export** privilege of **Export** or **All**. Likewise, given the amount of disk space and system resources that exporting all EHI data for the entire patient population entails, the Patient Population tab will initially be disabled, and you will need to contact Software Support to enable this functionality. Once the Electronic Health Information Export dialog is accessed, you will see three tabs: **Individual Patient**, **Patient Population**, and **Export Status**.

The **Individual Patient** tab allows you to export the entire EHI data in the system for an individual patient. Options are available to select the desired patient and choose an Output Directory. Additionally, once the output director is entered, the amount of disk space will populate. After the export options have been configured, you can click the **Export** button to initiate the export. You can view the status of the export in the Export Status dialog, and once the export is complete a To-Do List message will appear for the user that initiated the export.

The screenshot shows the 'Electronic Health Information Export' dialog box with the 'Individual Patient' tab selected. At the top, there are three tabs: 'Individual Patient', 'Patient Population', and 'Export Status'. Below the tabs, a text box contains the search criteria 'doe'. A table displays the search results with columns for Name, Account/Chart, and DOB. The table has four rows, with the second row, 'Doe, John D.', highlighted in blue. Below the table, it says 'Matching Results: 4'. There are two dropdown menus: 'Search Column' set to 'Last Name' and 'Search Type' set to 'Starts With'. At the bottom, there is a text box for 'Output Directory' containing 'C:\STI' and a button with three dots. To the right, it shows 'Disk Space Available: 54.83 GB'. At the very bottom right is an 'Export' button.

Name	Account/Chart	DOB
Doe, Jane M.	10013	3/3/2000
Doe, John D.	10011	2/19/2003
Doe, Sam	GREAT123456	9/12/1988
Doe, Walter	GRE12345	9/12/1969

Figure 2 – Electronic Health Information Export – Individual Patient

Added Features (continued)

Electronic Health Information Export (continued)

The **Patient Population** tab allows you to export the entire EHI data in the system for all patients for selected practices and/or providers. Options are available to select the desired practices and providers, configure an Export Name, choose an Output Directory, and whom to Notify once the export is complete. See Figure 3. Additionally, once the output director is entered, the amount of available disk space will populate, and you will need to check the confirmation option indicating that you are aware of the disk space requirements for the export. After the export options have been configured, you can click the **Export** button to initiate the export. You can view the status of the export in the Export Status dialog, and once the export is complete a To-Do List message will appear for the user selected in the Notify field.

Electronic Health Information Export

Individual Patient

Patient Population

Export Status

Select all practices and all providers to export the electronic health information for your entire patient population. You can filter by practice and/or provider to export a subset of your patients.

Practice(s):

☒ Name

☒ Fictional Physicians (1)

☒ Central Medical Practice (CM)

Provider(s):

☒ Name

☒ Doe, John D (JD)

☒ One, Provider (1)

Export Name:

Patient Population

Output Directory:

C:\STI

Notify:

Administrator

Disk Space Available:

54.83 GB

Please ensure there is enough disk space available to save the exported data to the specified location. The export may require more space than the estimate provided.

Contact STI Customer Support if you would like assistance finding an appropriate storage solution.

☒ I confirm I am aware of the disk space requirements for this export

Export

Figure 3 – Electronic Health Information Export – Patient Population

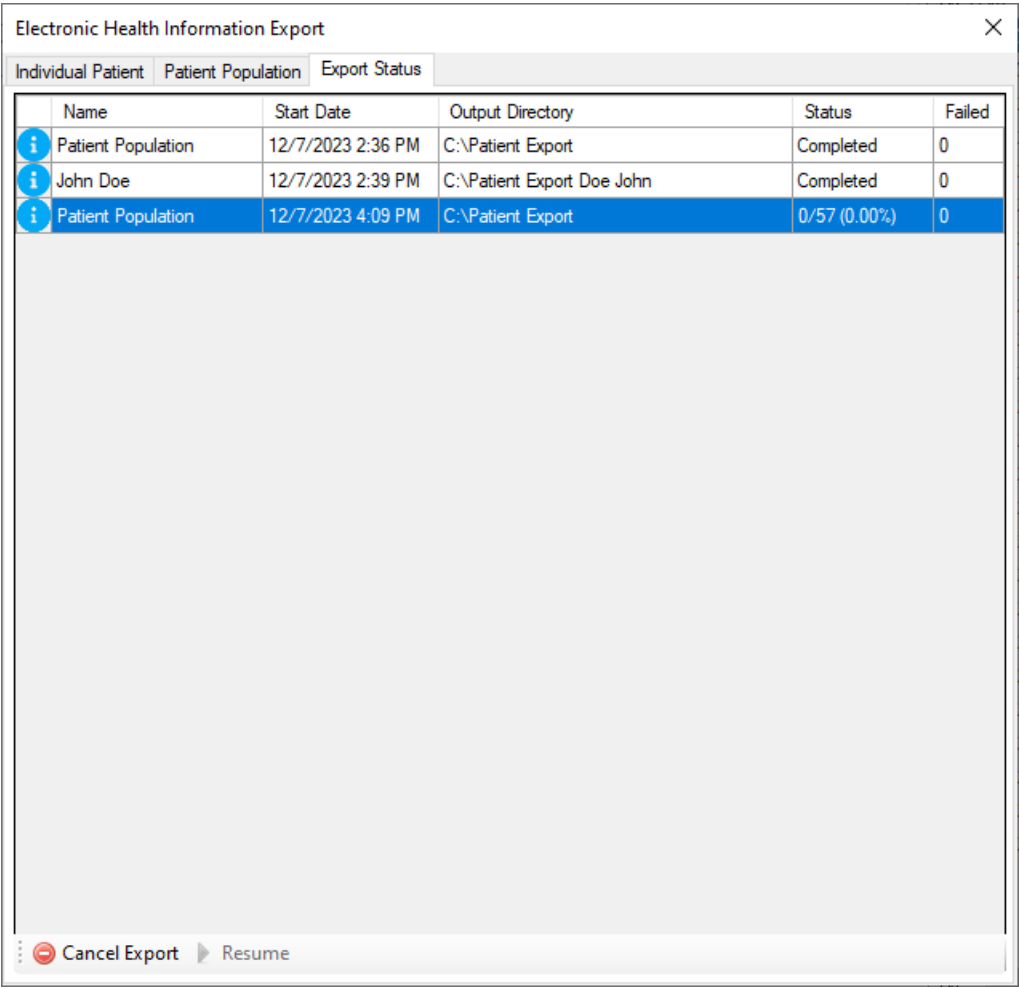
Added Features (continued)

Electronic Health Information Export (continued)

The **Export Status** tab allows you to view export status information for each export that was started. It will display the export **Name**, **Start Date**, **Output Directory**, current **Status**, and if any records **Failed**. See Figure 4. You can click the corresponding blue Information button to view the Export Setting for the export. Also, you have ability to **Cancel** and **Resume** an export that is currently active using the buttons at the bottom of the dialog.

When an export has completed the exported files will be in the designated Output Directory. Also, a Readme.txt file will also be included in that directory that contains a hyperlink (<https://sticomputer.com/electronic-health-information-export/>) for the export format document which contains information on how the various export files are formatted.

The system will also track in the Audit Trail when an Individual Patient export has completed, when a Patient Population export has completed, as well as if an export was canceled and/or resumed. Additionally, a To-Do List message will be sent the applicable user if the export stops due to a lack of disk space.



Electronic Health Information Export				
Individual Patient Patient Population Export Status				
Name	Start Date	Output Directory	Status	Failed
 Patient Population	12/7/2023 2:36 PM	C:\Patient Export	Completed	0
 John Doe	12/7/2023 2:39 PM	C:\Patient Export Doe John	Completed	0
 Patient Population	12/7/2023 4:09 PM	C:\Patient Export	0/57 (0.00%)	0
Cancel Export Resume				

Figure 4 – Electronic Health Information Export – Export Status

Added Features (continued)

- **The ID Tab** – In order to alleviate some inadvertent changes to editable fields in the ID tab, the system has been updated so that when accessing the ID tab, the focus and cursor will start in read-only Chart # field. The user will then need to click or tab into the editable fields to make any necessary changes.
- **The ID Tab – Case** – The **Insurance** drop-down list, in the **Case** section of the **ID** tab, has been updated so that expired insurances will be appended with an **(EXPIRED)** indicator to easily distinguish active and expired insurances in a patient's chart. See Figure 5.

Figure 5 – ID Tab – Case

Likewise, when an insurance is selected, if you mouse over the insurance a tooltip will be displayed indicating the expiration date of the insurance, if configured. See Figure 6.

Figure 6 – ID Tab – Case – Insurance

Added Features (continued)

- **MIPS Dashboard – Configuration** – The **Qualifies for small practice bonus** option in the Quality Reporting section in the MIPS Dashboard Configuration dialog (for the 2023 performance period), has been relabeled to **Qualifies as small practice** to better describe this option. See Figure 7.

The screenshot shows the 'MIPS Dashboard Configuration' dialog box. The 'Configuration name' is 'Central Associates'. The 'Performance period' is '1/ 1/2023' to '12/31/2023'. Under 'Eligible clinicians (NPI)', there is a 'Select all' button and a list with one entry: 'Doe, Jane C (8005502999)' with a checked checkbox. The 'Practice (TIN)' is 'Central Medical Practice (23123213)'. The 'Facility' and 'PCF Identifier' fields are empty. In the 'Quality Reporting' section, there are three radio buttons: 'Reporting through the EHR', 'Reporting through the STI Quality Reporting Registry', and 'Reporting through a combination of the EHR and STI Quality Reporting Registry' (which is selected). Below these is a text field 'Number of measures reported through the STI Quality Reporting Registry:' with the value '1'. The 'Qualifies as small practice' checkbox is checked and highlighted with a red box. There are 'Do I qualify?' links for both the Quality Reporting and Improvement Activity Adjustments sections. The 'Improvement Activity Adjustments' section has four radio buttons: 'None', 'Small practice, rural area, or non-patient facing clinician' (selected), 'Patient Centered Medical Home or equivalent', and 'Other approved Alternative Payment Model'.

Figure 7 – MIPS Dashboard Configuration – Quality Reporting

Additionally, whenever the **Qualifies as small practice** option is modified, a new MIPS Configuration pop-up warning message will appear, alerting you that you will need to open the Quality card on the MIPS Dashboard, and then click OK, to allow the reconfiguration of the Category Score on the main MIPS Dashboard. See Figure 8.

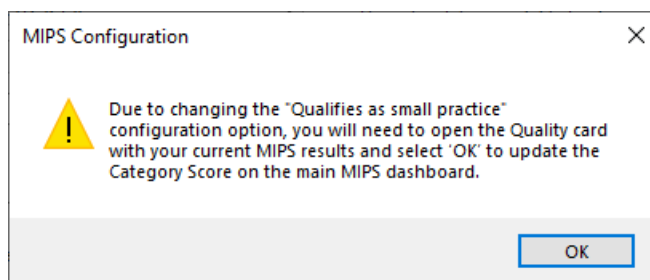


Figure 8 – MIPS Configuration Pop-Up Warning

Added Features (continued)

- **The Note Tab – Custom Forms** – The ChartMaker Medical Suite: Forms dialog has been updated with a new signature option that allows you to sign custom forms for a selected signature field using the Clinical signature widget instead of a Topaz signature device. The signing buttons have been updated to include a Topaz signing button that has been relabeled, a new signing button that uses the Clinical signature widget, and a clear selected signature button. See Figure 9. Each button has an applicable tooltip when hovering the mouse over the button.

When the new signing button has been clicked, a Signature dialog will appear allowing the signee to electronically sign using the mouse, touchscreen, or stylus to provide a signature, depending upon the type of hardware used. Once an approved signature is provided and the **OK** button clicked, the signature will fill the selected signature field.

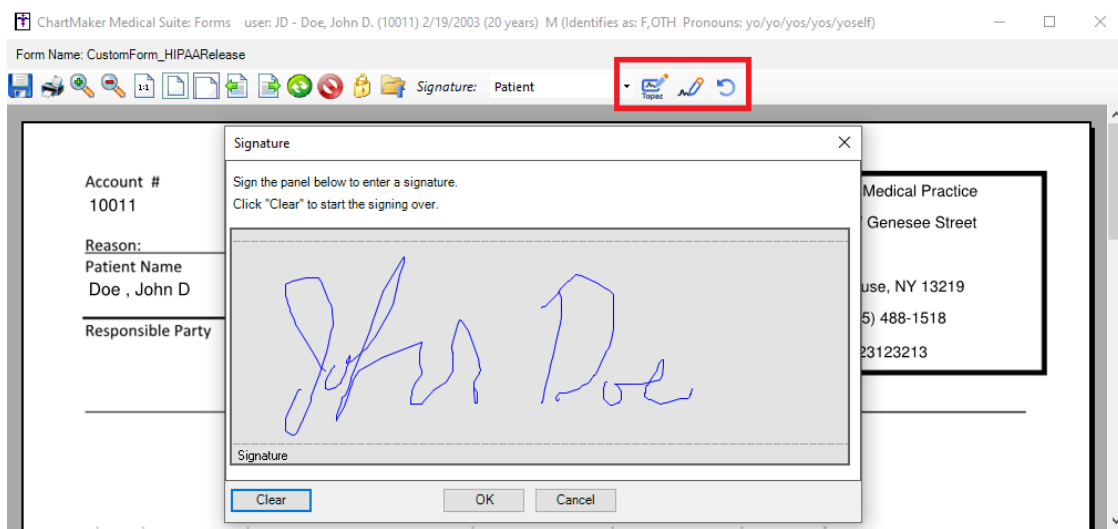


Figure 9 – ID Tab – Case

- **The Note Tab – Order Procedure – Immunizations** – The program has been updated to ensure that the latest CVX codes and CVX mappings, MVX codes and MVX mappings, Manufacturers, and NDC codes, per the latest CDC guidelines, are used for immunization procedures.

Added Features (continued)

- Preferences — Orders/Order Sets** – The **Orders** section of the **Orders/Order Sets** tab, has been updated with a new **Include CPT modifiers on Orders** option, allowing you to have up to 4 modifiers print on the order when attached to the lab, image, or test order procedure. See Figure 10.

The screenshot shows the 'Preferences' dialog box with the 'Orders/Order Sets' tab selected. The 'Orders' section contains several checkboxes. The checkbox 'Include CPT modifiers on Orders' is checked and highlighted with a red rectangular box. Other visible options include 'Show on the To-Do list All tab', 'Automatically queue for printing', 'Include electronic signature on Orders', 'Include electronic signature on Referrals', and 'Send procedures directly to Facesheet (Bypass "Note - Send Orders")'. The 'Appropriate Use Criteria' section shows the AUC URL as 'https://sso.careselect.org/Account/Login' and the CDSM Name as 'CareSelect'. At the bottom, there are buttons for 'OK', 'Cancel', 'Apply', and 'Help', and a 'Save' button next to a note.

Figure 10 – Preferences – Fax

When the **Include CPT modifiers on Orders** option is selected, whenever a procedure order is printed or previewed, the modifiers attached to that procedure order (up to four modifiers), will print directly below the Comment line of the procedure order. See Figure 11.

The screenshot displays a 'LAB ORDER' form for a patient named Harry Potter. The form includes patient demographics, insurance information, and procedure details. Two procedure sections are highlighted with red boxes to show modifiers:

- BLOOD CLOT INHIBITOR ANTIGEN**: Comment: comment 8. Modifiers: 59 - Distinct procedural service, 26 - Professional component.
- ANALYZE SKELETAL MUSCLE**: Comment: comment 49. Modifiers: 50 - Bilateral procedure, 26 - Professional component, 8P - For reason not specified.

 The modifier lists are shown below the procedure names and are highlighted with red boxes. The form also lists various medical conditions such as 'Essential (primary) hyperparathyroidism', 'Umbilical hernia with gangrene', 'Meningeal tuberculoma', 'Malignant poorly differentiated neuroendocrine tumors', and 'Hormone sensitive malignancy status'.

Figure 11 – Orders – Modifiers

Added Features (continued)

- **Scan Management** – The **Case** drop-down list, in the **Scan Management** screen, has been updated so that the cases listed, excluding the Normal case, will have the Open Date, if entered, appended to the case label to easily identify the applicable case the scan should be filed into. See Figure 12. Additionally, the checkbox options have updated so that they are only selectable when clicking the checkbox or the checkbox label. In previous versions, the checkbox options could become activated by clicking outside the checkbox or label.

The screenshot shows the 'Scan Management' window. On the left, there's a 'Local Files' section with a filter. Below it, a search results table shows 'Doe, John D.' with account 10011 and DOB 2/19/2003. The main area on the right has fields for 'Send to:', 'Heading' (Progress Note), 'Practice' (Fictional Physicians), 'Provider', 'Date' (11/28/2023), 'Folder' (Unfiled), and 'Case'. The 'Case' dropdown is open, showing options: 'Normal', 'No Fault 11-24-2023', 'Worker Comp 12-15-2022', and 'No Fault 06-06-2022'. Below these are checkboxes for 'Stack scans into one Note', 'Scan as Educational Materials', and 'Scan as Patient-Generated Health Data'. At the bottom, there are buttons for 'Delete', 'Undo', 'Auto Import', 'Save', and 'Close'.

Figure 12 – Scan Management

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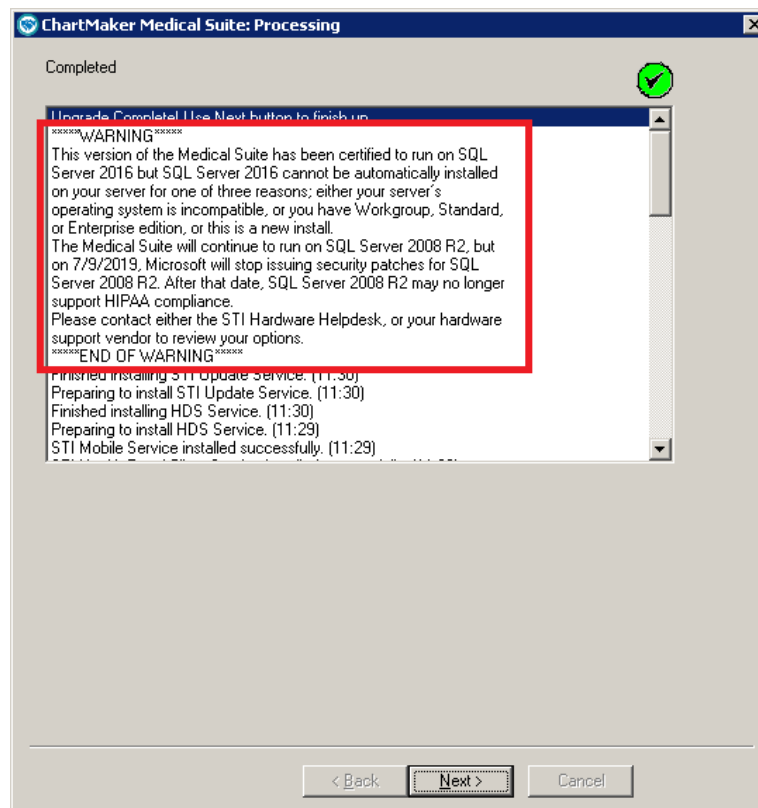
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ChartMaker® Practice Manager Release Notes

ChartMaker® 2022.1 (fv6.7.7)

Important Notifications

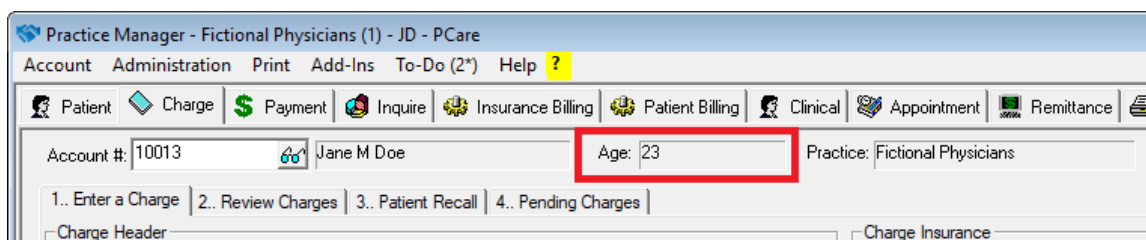
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ChartMaker Medical Suite SQL Server 2016 Warning

Charge

- **Charge** – The Charge screen has been updated with a new **Age** field that will display the selected patient's age. See Figure 1. This new field is between the patient's name and the Practice field, and how the age will be displayed is based on how the **Age Formatting** preferences are configured in the **General Behavior** tab of the **Maintain System/Practice/Operator Preferences** area (Administration > Preferences System/Practice/Operator Level Preferences).



The screenshot shows the 'Practice Manager - Fictional Physicians (1) - JD - PCare' window. The 'Charge' tab is selected. The 'Account #' field contains '10013', the patient name is 'Jane M Doe', and the 'Age' field is '23'. The 'Practice' field is 'Fictional Physicians'. Below the patient information, there are buttons for '1.. Enter a Charge', '2.. Review Charges', '3.. Patient Recall', and '4.. Pending Charges'. At the bottom, there are fields for 'Charge Header' and 'Charge Insurance'.

Figure 1 – Charge – Age

Clinical

- **Clinical – Immunization** – The program has been updated to ensure that the latest CVX codes and CVX mappings, MVX codes and MVX mappings, Manufacturers, and NDC codes, per the latest CDC guidelines, are used for immunization procedures.

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