Prior to Loading this Update, Please Read the Following Important Information, Regarding…

- **800 x 600 Screen Resolution** – Please be aware that with this release of ChartMaker® Clinical the screen resolution of 800 x 600 will no longer be supported. The program has been updated to require a display setting of at least 1024 x 768. Users that have a screen resolution of 800 x 600 may experience a limited view of the Clinical screen requiring you to scroll to view certain screen items and buttons; and, in some cases, certain objects and function buttons may not be displayed. For information on changing your display settings to 1024 x 768, if needed, please consult the Clinical Help System.

Added Features

- **Audit Trail –** The Audit Trail has been updated so that when users that have a Chart privilege of None will not be able to view any patient clinical or demographic data in the Description, New Value, or Old Value columns in the Audit Trail.

- **The Appointment List –** The View menu has been updated with an Inactive Appointments option that allows you to select whether or not you would like to view inactive appointments (reschedule later, canceled, and no show appointments) when viewing an appointment list in Clinical. See Figure 1. If this option is selected, any applicable inactive appointments will be displayed in the appointment list; if this option is not selected, inactive appointments will not be displayed.

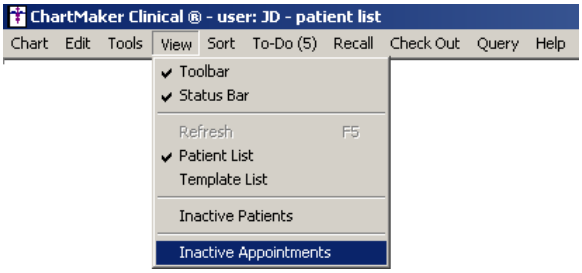

Figure 1 – View Menu

- **Decision Support –Rule Builder –** The Rule Builder dialog has been updated so that the Data Points tab appears before the Rules tab to better follow the flow of setting up decision support alerts.

- **Decision Support –Rule Builder – Rules –** The Rules tab has been updated with an Active Rule option that allows you to easily determine whether a rule is active, and applicable decision support alerts will be generated when the rule conditions are met, or if it is inactive, and decision support alerts will not be generated for the selected rule, by checking or unchecking this option. If this option is checked, the rule will be considered active and applicable alerts will be generated. If this option is not checked, the rule will be considered inactive and applicable alerts will not be generated. See Figure 2.

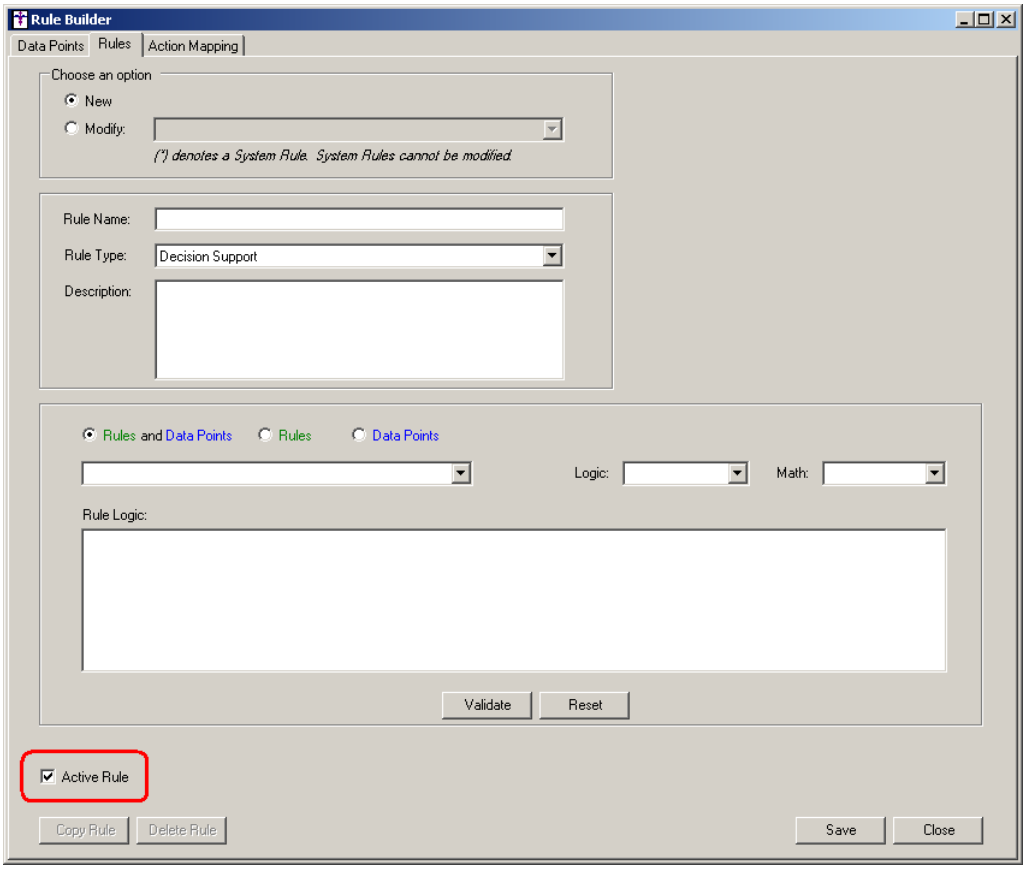

Figure 2 – Rule Builder

Added Features (continued)

- **Export Patient Document –** The Export Patient Document dialog has been updated so that the field layout and labels provide an easier and more efficient method of entering and selecting applicable information. See Figure 3.

  The Document to Export field allows you to select three document types to choose from when exporting patient data: Office Visit Clinical Summary, Electronic Copy of Health Information, or Transition of Care Summary.

  The Document Requested Details section will become accessible if the Electronic Copy of Health Information document type is selected in the Document to Export field. The Last Request and New Request fields may contain data and/or be accessible to configure certain data, as this section will also work in conjunction with the Patient Requests Electronic Records option in the Message Detail dialog.

  If no request exists for the selected patient, the New Request option will default and you can select the appropriate provider in the Select Provider field below. When an outstanding request exists that is less than or equal to 3 business days after the request date, the Last Request option will default showing the date of the request, and New Request option will be disabled.

  When an outstanding request exists that is greater 3 business days but less than 60 days, the Last Request and New Request will both be enabled, with Last Request being selected by default and will show the date of the request and have (Unsatisfied) tag next to it. By selecting a New Request, the system will close the Unsatisfied request as Unsatisfied, and then create a new request entry and fulfilled date the same as the new request.

  When a request exists that is over 60 days, only the New Request option will be accessible. In this case you can select the applicable provider for the new request.

  The Encounter/Visit Selection section will become accessible if the Office Visit Clinical Summary document type is selected in the Document to Export field. You can then configure the date for which you want the Office Visit Clinical Summary in the corresponding field.

  The Document Encryption section becomes accessible if the CCD document format is selected, allowing you to encrypt data with a password. Only documents with a Data Format of CCD (Continuity of Care Document) can be encrypted.

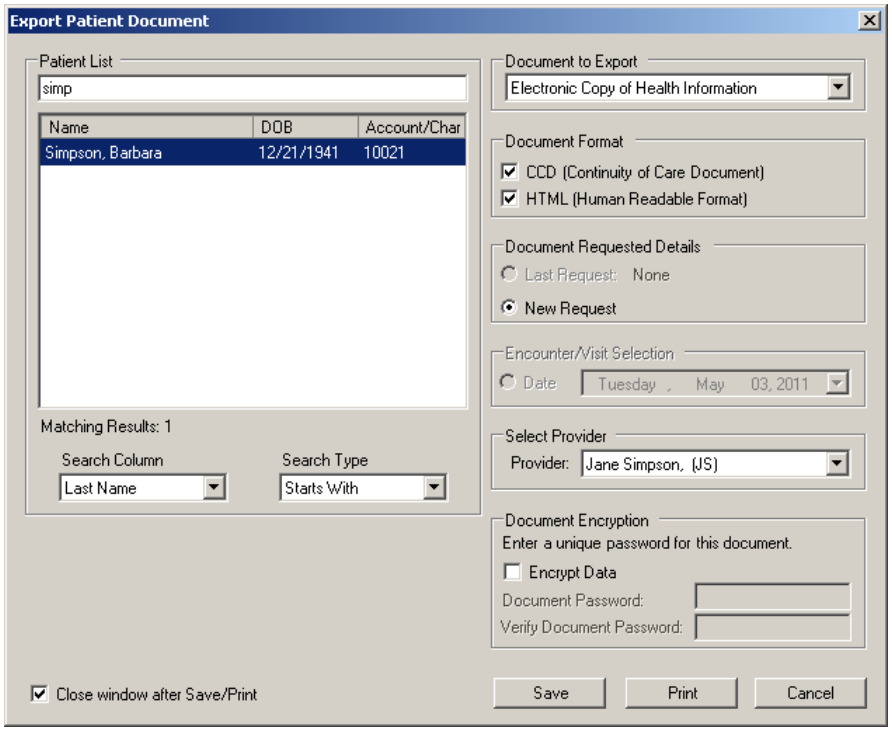

Figure 3 – Export Patient Document

- **Export Patient Document –** The program has been updated so that unauthorized users are not allowed to export patient documents for restricted patients. However, if an unauthorized user has the Break the Glass privilege they will be able to override the restriction and an applicable entry will be made in the Audit Trail.

Added Features (continued)

- **Export Patient Document –** The HTML (Human Readable Format) versions of the Electronic Copy of Health Care and Transition of Care Summary have been updated so that Medications and Allergies will be ordered first by Active then Removed/Discontinued followed by date. Problems (diagnoses) will be ordered by: Active, Inactive, Resolved then by diagnosis date.

- **Export Patient Document –** The Office Visit Clinical Summary document has been updated so that all active medications will be displayed. Any medications or allergies that were discontinued or removed on the same date as the Clinical Summary will be displayed with the medication being shown as No Longer Active, and the Allergy being shown as Removed. All medications and allergies discontinued or removed prior to date of the Clinical Summary will not be displayed. Likewise, new, resolved, or inactive diagnosis/problems will only be displayed if they occur on the same date as the Clinical Summary date.

- **Face Sheet – PHR –** The Face Sheet has been updated with a PHR button that allows you to view the PHR status for a patient. See Figure 4. If the button says PHR and is grayed out, the patient is not registered for the PHR through Microsoft HealthVault. If the button says PHR On and is yellow, the patient is registered with Microsoft HealthVault. If the button says PHR On and is green, the patient is authorized. If the button says PHR Off and is yellow, the patient is registered, but the automatic CCD sending is turned off. If the button says PHR Off and is green, the patient is authorized, but the automatic CCD sending is turned off.

Figure 4 – Face Sheet Buttons

- **Growth Charts –** The Growth Charts have been updated so that the X-axis will list the patient's age in months for patients aged 0 to 3, and in years for patients aged 2 to 20.

- **The ID Tab –** The ID Tab has been updated to include a Salutation and Suffix field. See Figure 5. This field allows you to select a salutation preference and enter any applicable suffix for a patient.

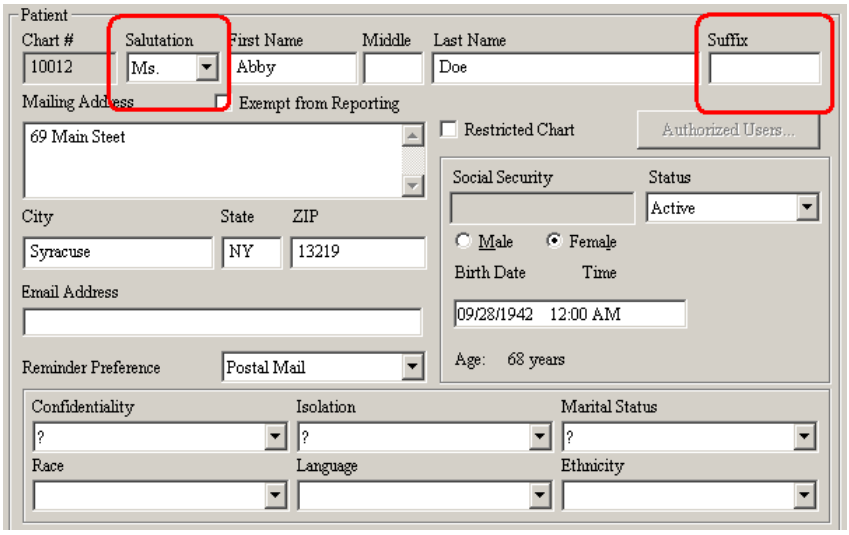

Figure 5 – The ID Tab – Patient

- **Lab Interface –** The program has been updated so that when printing a Lab Report the formatted shading over the Out of Range column is removed allowing the data to be more easily read if the report is faxed.

Added Features (continued)

- **The Note Tab – Family History Notes –** The Family History dialog has been updated so that you can easily create, edit, and delete family history notes, and then decide which notes will appear in the current chart note, or in the face sheet, or in both locations. See Figure 6. To create a new family history note, click the New button. To edit or delete a family history note, simply highlight the applicable note and click the Edit or Delete button. When a note has a checkmark in the Display in Note column, that note will appear in the current chart note. When a note has a checkmark in the Display in Facesheet column, that note will appear in the patient's face sheet in the Family History section. You can select all notes to display in the chart note by clicking the Select All button, or unselect all notes by clicking the Unselect button. In addition, you also have the ability to display only notes that are to be displayed in the face sheet by clicking the new Display Facesheet Items Only option. Any additions and modifications for family history notes will be tracked in the History tab.

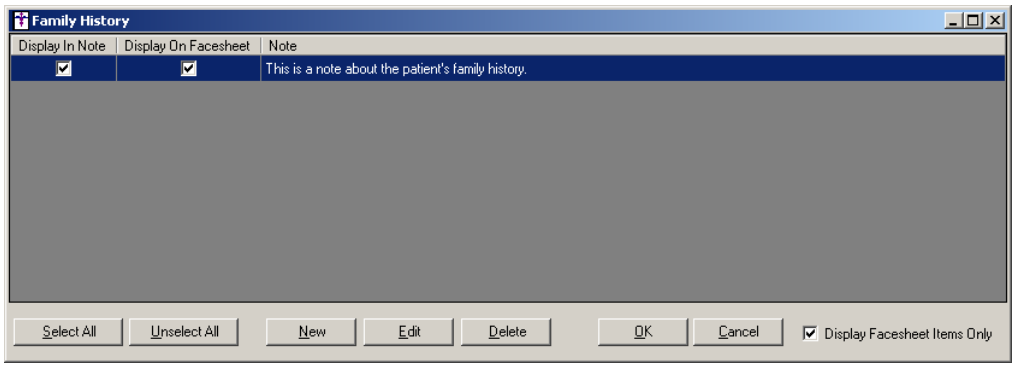

Figure 6 – Family History Notes

- **The Note Tab – Miscellaneous Notes –** The program has been updated so that any modifications (edits) to a miscellaneous note will be tracked in the History tab.

- **The Note Tab – Note Menu –** The program has been updated so that the New Note label replaces the Instant Note label in the Note menu. See Figure 7. The functionality has not changed.

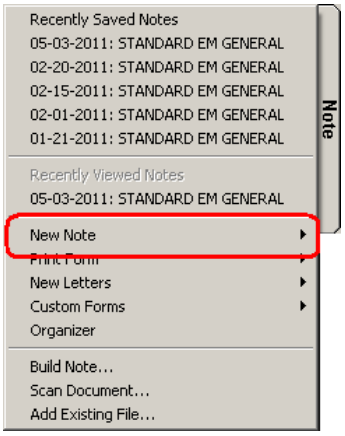

Figure 7 – Note Menu

- **The Note Tab – Organizer –** The program has been updated so that when accessing the Organizer for a patient, "Note" will remain the tab label.

- **The Note Tab – Patient Annotation Notes –** The Patient Annotation dialog has been updated so that you can easily create, edit, and delete patient annotation notes, and then decide which notes will appear in the current chart note, or in the face sheet, or in both locations. See Figure 8. To create a new patient annotation note, click the New button. To edit or delete a patient annotation note, simply highlight the applicable note and click the Edit or Delete button. When a note has a checkmark in the Display in Note column, that note will appear in the current chart note. When a note has a checkmark in the Display in Facesheet column, that note will appear in the patient's face sheet in the Patient Annotation section. You can select all notes to display in the chart note by clicking the Select All button, or unselect all notes by clicking the Unselect button. In addition, you also have the ability to display only notes that are to be displayed in the face sheet by clicking the new Display Facesheet Items Only option. Any additions and modifications for patient annotation notes will be tracked in the History tab.

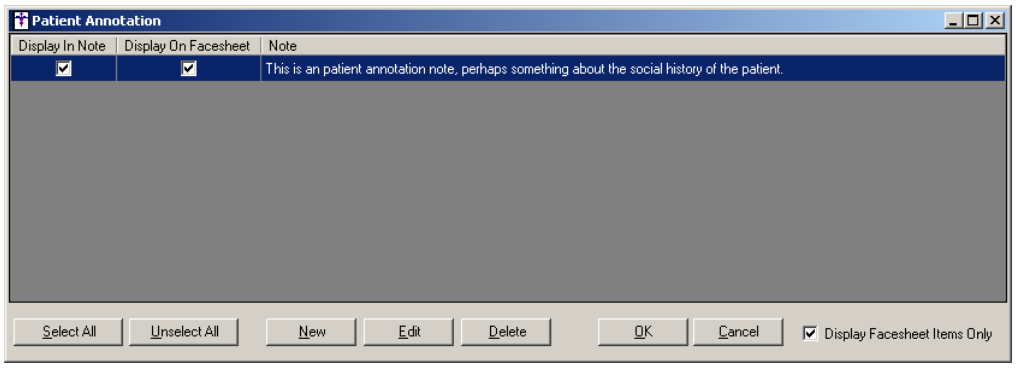

Figure 8 – Patient Annotation Notes

- **The Note Tab – Patient History Notes –** The Patient History dialog has been updated so that you can easily create, edit, and delete patient history notes, and then decide which notes will appear in the current chart note, or in the face sheet, or in both locations. See Figure 9. To create a new patient history note, click the New button. To edit or delete a patient history note, simply highlight the applicable note and click the Edit or Delete button. When a note has a checkmark in the Display in Note column, that note will appear in the current chart note. When a note has a checkmark in the Display in Facesheet column, that note will appear in the patient's face sheet in the Patient History List section. You can select all notes to display in the chart note by clicking the Select All button, or unselect all notes by clicking the Unselect button. In addition, you also have the ability to display only notes that are to be displayed in the face sheet by clicking the new Display Facesheet Items Only option. Any additions and modifications for patient history notes will be tracked in the History tab.

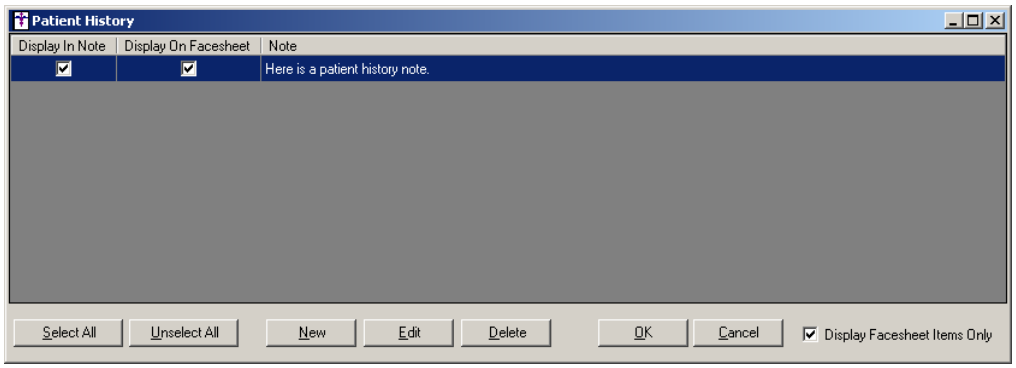

Figure 9 – Patient History Notes

- **The Note Tab – Prescriptions –** The program has been updated so that when prescribing medications the number of refills will print in the chart note as well as in auto-generated notes when prescribing via the face sheet. Likewise, refill information will also be viewable in the History tab for the applicable medications.

- **The Note Tab – Pharmacy –** The program has been updated with the ability to have a pharmacy print in the patient's chart note when applicable via the Pharmacy button. See Figure 10. Do note that the patient has to have a pharmacy configured in the ID tab for a pharmacy to be shown in the patient's chart.

Figure 10 – Pharmacy Button

To select a pharmacy for a patient, click the Pharmacy button. If there is a single pharmacy in the patient's ID tab, then that pharmacy will be added once the Pharmacy button is clicked. Click the Pharmacy button again to remove the pharmacy listing from the chart note.

If there are multiple pharmacies attached to a patient's ID tab, then a Note Pharmacy Selection dialog will appear listing all of the pharmacies attached to the patient's chart. See Figure 11. Highlight the applicable pharmacy that you want to appear in the chart note, and then click the OK button. Pharmacies can be removed in the Note Pharmacy Selection dialog, by clicking a highlighted pharmacy so it is no longer highlighted, and then clicking the OK button.

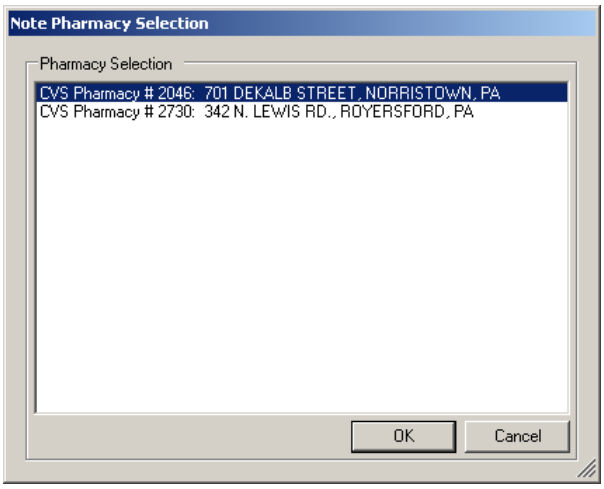

Figure 11 – Note Pharmacy Selection

- **The Note Tab – Surgical History Notes –** The Surgical History dialog has been updated so that you can easily create, edit, and delete surgical history notes, and then decide which notes will appear in the current chart note, or in the face sheet, or in both locations. See Figure 12. To create a new surgical history note, click the New button. To edit or delete a surgical history note, simply highlight the applicable note and click the Edit or Delete button. When a note has a checkmark in the Display in Note column, that note will appear in the current chart note. When a note has a checkmark in the Display in Facesheet column, that note will appear in the patient's face sheet in the Surgical History List section. You can select all notes to display in the chart note by clicking the Select All button, or unselect all notes by clicking the Unselect button. In addition, you also have the ability to display only notes that are to be displayed in the face sheet by clicking the new Display Facesheet Items Only option. Any additions and modifications for surgical history notes will be tracked in the History tab.

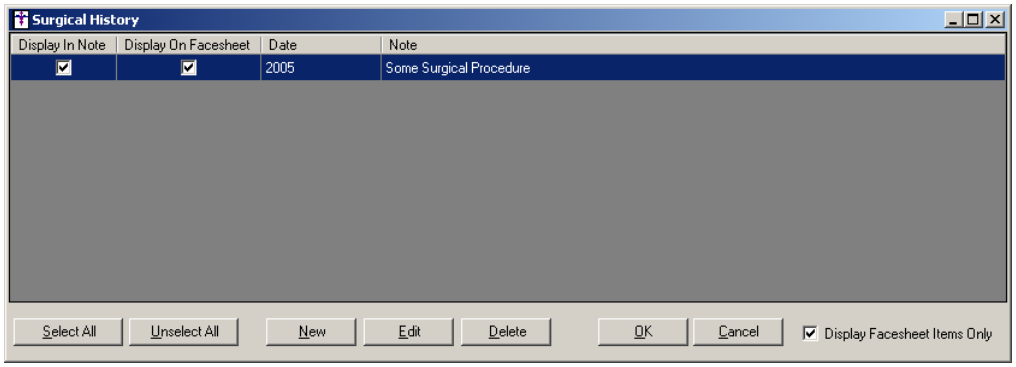

Figure 12 – Surgical History Notes

Added Features (continued)

- **PHR Management –** The program has been updated so that all Patient Portal labels throughout the system have been changed to PHR and the Patient Portal Management dialog has been changed to PHR Management dialog. See Figure 13.

- **PHR Management –** The PHR Management dialog has been updated with an AutoSend column that allows you to turn on or off the automated CCD batch process being sent to Microsoft HealthVault for authorized or pending patients. If the AutoSend column is checked the automated CCD batch process will be turned on; of the AutoSend column is unchecked the automated CCD batch process will be turned off.

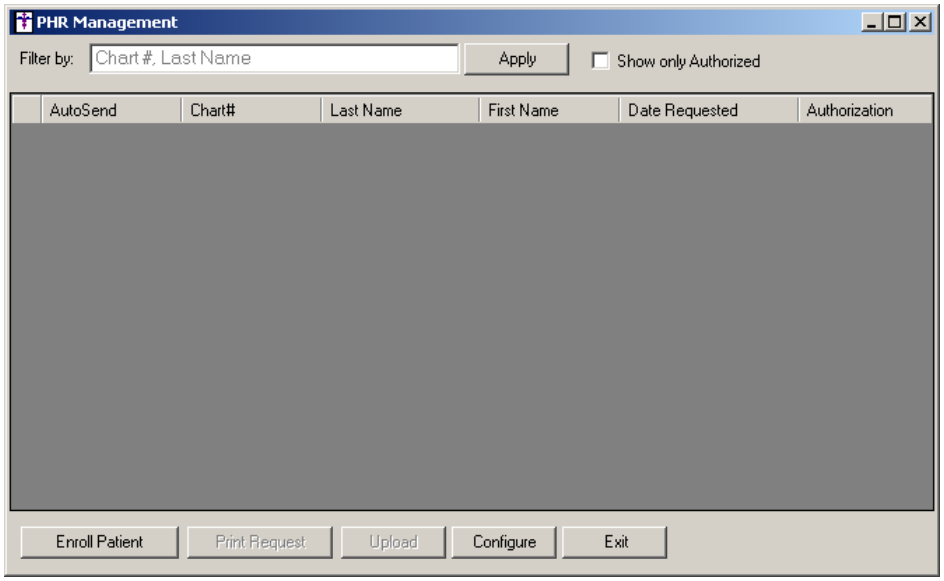

Figure 13 – PHR Management

- **Preferences – Scans –** A new Scan as a Lab Result Disable preference has been added to the Scans tab in the Preferences dialog that allows you to disable the Scan as a Lab Result option in the Scan Management dialog. See Figure 14. When this preference is selected, the Scan as a Lab option will be grayed out and disabled in the Scan Management dialog.

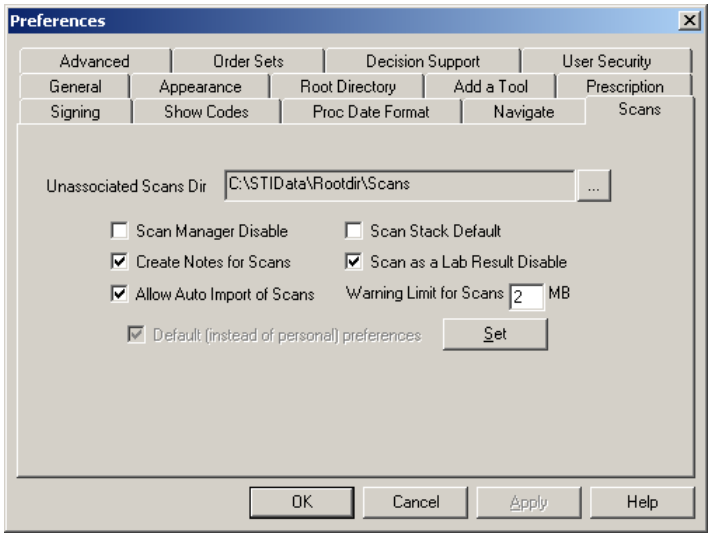

Figure 14 – Preferences – Scans

- **System Change –** The ChartMaker Medical Suite is now able to run on 64-Bit Operating Systems.

Added Features (continued)

- **Template Editing – Pharmacy –** The Template Editor has been updated with the ability to add a Pharmacy button to a template. The Pharmacy button allows users to have a pharmacy print in the patient's chart note if a pharmacy was selected in the ID tab.

- **Template Editing – Template List –** The Template List has been updated with new enhancements that allow you to easily field templates when making additions or modifications to chart templates. An initial drop-down list has been added that allows you to select All Templates, All My Templates, or All Instant Templates. See Figure 15. Right below the initial drop-down list is a search field allowing you to enter text to further filter the templates displayed, and if you click the drop-down list the last 5 templates selected will be displayed.

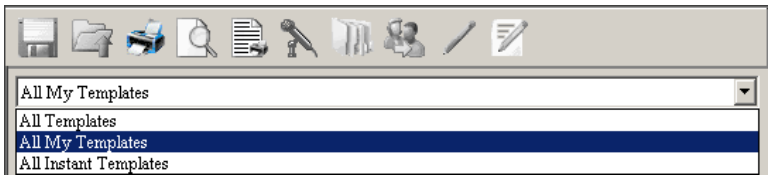

Figure 15 – Template List Drop-Down