

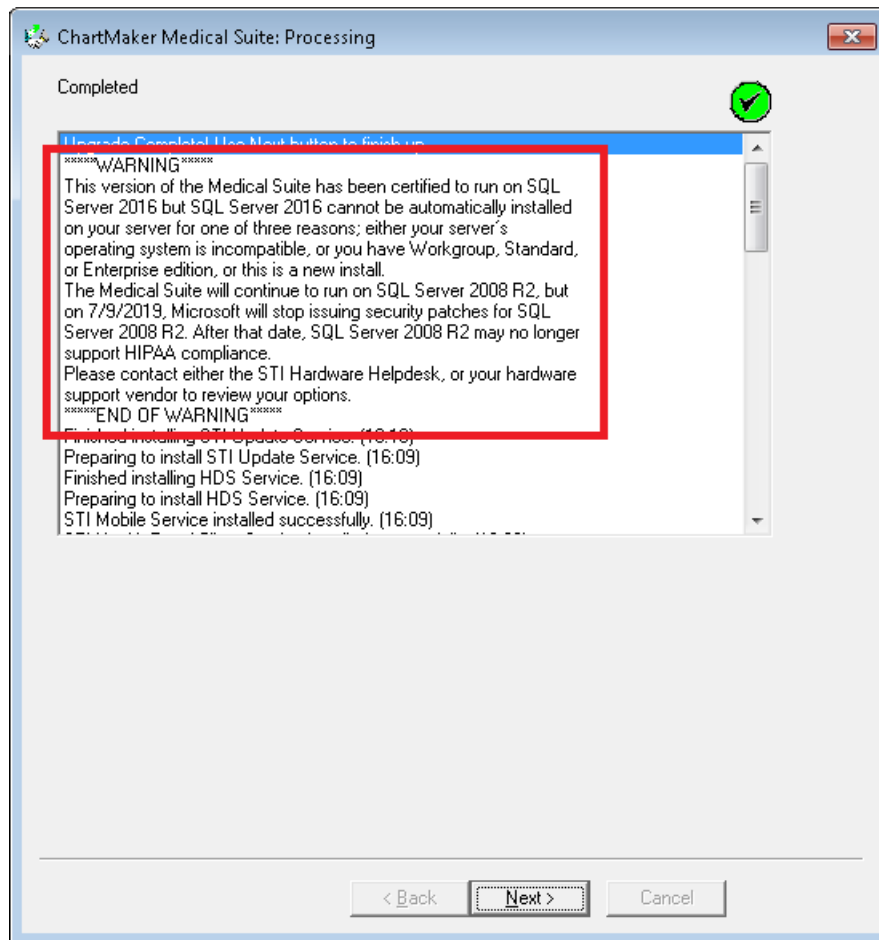


# ChartMaker® Clinical Release Notes

ChartMaker® 2018.2 (fv6.3.4)

## Important Notifications

- **Upgrade from Microsoft Server 2008 and Windows 7** – In January 2020, your Windows 7 workstations and Microsoft 2008 Servers will no longer be supported. Even with security patches, **problems may still arise** if you choose not to upgrade. In addition, your workstations will no longer be HIPAA compliant. To avoid potential issues in the future, 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

- **Chart – Appointment Search** – The system has been updated so that whenever accessing the appointment list for **Today's Appointments**, **Today's Appointments, time filtered**, **Tomorrow's Appointments**, or **Yesterday's Appointments**, a Calendar icon will be activated to the right of the drop-down list, allowing you to select a specific date you want to view the appointment list for the selected provider. See Figure 1.

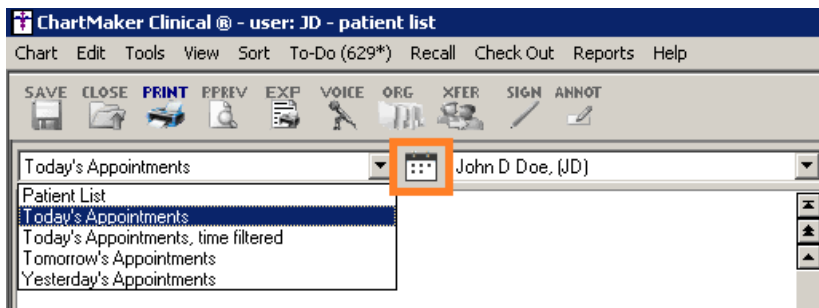


Figure 1 – Chart – Appointment Search

After the Calendar icon is clicked, a Calendar widget will appear that allows you manipulate and select the date for the appointments you want to view. See Figure 2. After the applicable date has been selected, the drop-drop will switch to Appointment Search mode, and the patients who have an appointment on that date for the selected provider will then appear. You can also modify the selected provider as needed, and the appointments will show for that provider for that selected date. After the desired patient is located, you can double-click that patient to open their chart.

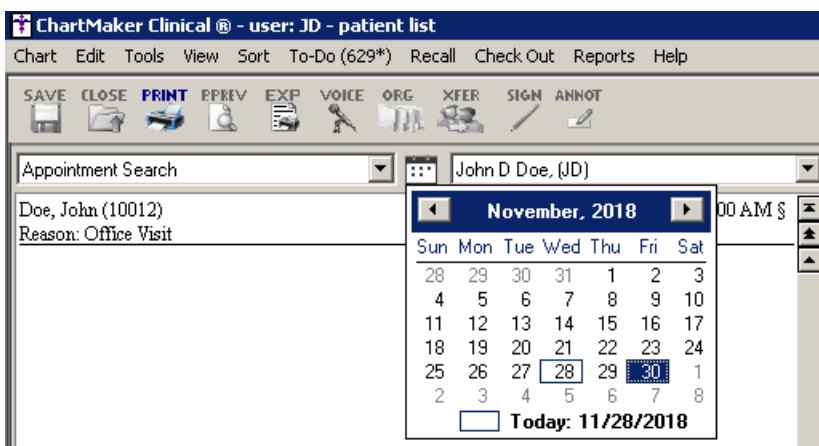


Figure 2 – Chart – Appointment Calendar Widget

## Added Features

- Immunization Registry – Submission Status** – The Submission Status dialog (**Chart > Registries > Immunization > Submission Status**) has been updated with the ability to select multiple immunization records to be resubmitted, when a single registry is selected in the Registry field. See Figure 3. The multi-select feature only works when a specific registry is selected in the Registry field, and if one is not selected, a warning message will appear stating that you must select a registry before performing a multi-submission. See Figure 4.

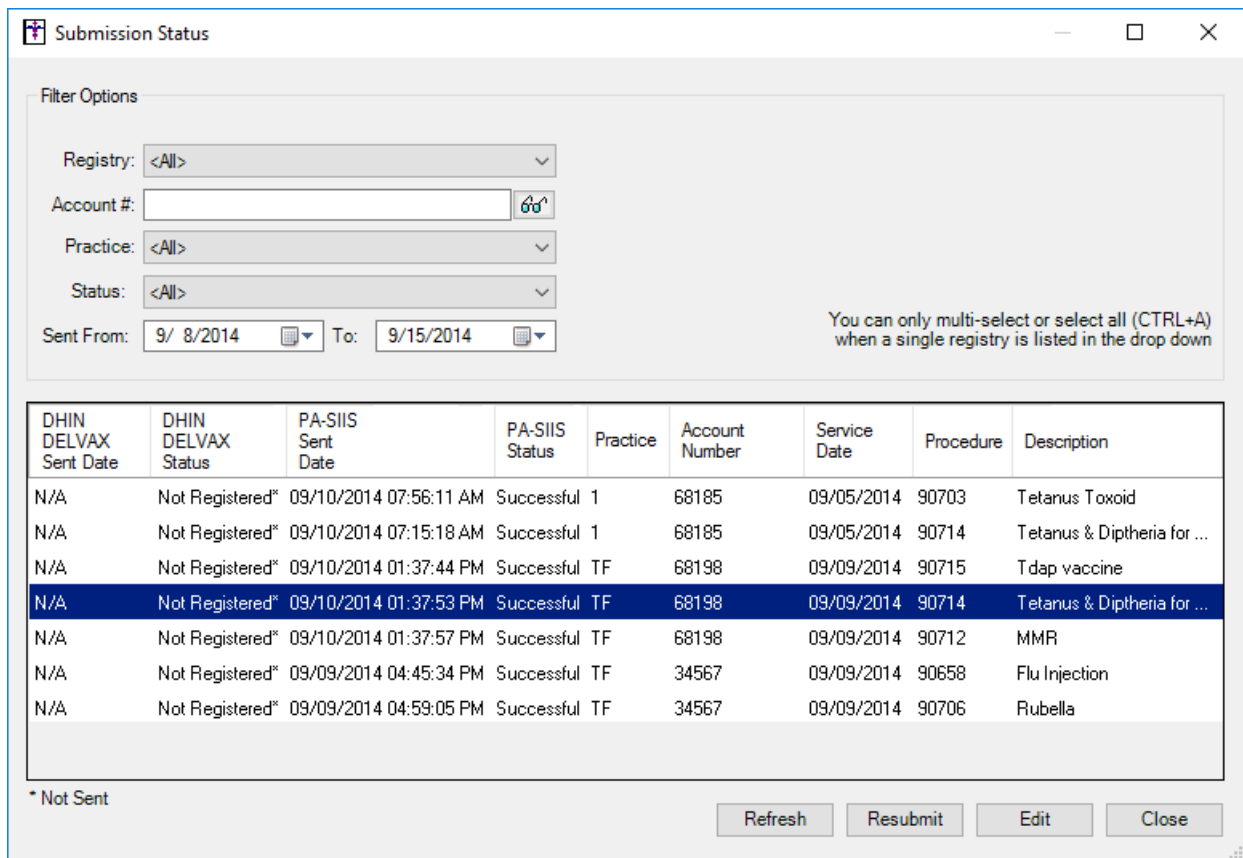


Figure 3 – Submission Status

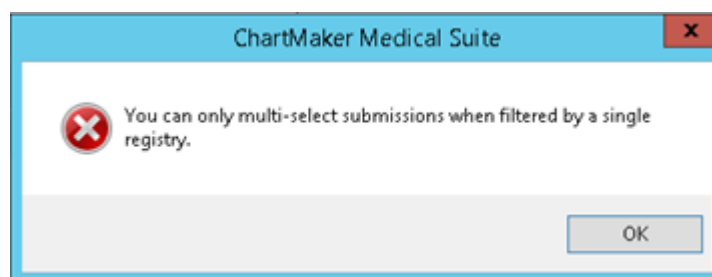


Figure 4 – Submission Status – Multi-Select Warnint

## Added Features (continued)

- **Medication – Prescribe Medication** – The Prescribe Medication dialog has been updated to alert users when they are prescribing a form of a medication that has an invalid, obsolete, or missing NDC code. Upon entering the Prescribe Medication dialog, if the **Started** field is checked (indicating that this is not a pre-existing medication), and the medication form selected does not have a valid NDC code attached to it, a red exclamation warning icon will appear next to the medication form field, and if you hover over the icon the warning message will appear outlining the issue. See Figure 5.

The screenshot shows the 'Prescribe Medication' dialog box. At the top, the medication is identified as 'acetaminophen 100 mg/mL oral drops (OTC, Brand)'. The 'Prescription' section on the left includes fields for Route (oral), Medication (acetaminophen 100 mg/mL oral drops), Action (Take), Dose (1), Dose Units (drops), Frequency (As Needed), Dispense (500 Milliter), and Refills (0). A red exclamation mark icon is visible next to the medication name. A tooltip warning message is displayed over the medication field, stating: 'This medication does not have an NDC code and cannot be e-prescribed. Depending on the medication you are prescribing you may need to adjust the strength, prescribe a new medication or in the case of a compound medication print it to paper.' The 'Formulary' section shows a table with columns for Payer, Medication, Status, Coverage, Copay, and Copay Info. The 'Transmission' field is set to 'E-Prescribe'. The 'Started' date is 11/28/2018. At the bottom right, there are 'Cancel', 'Back', and 'Next' buttons.

Figure 5 – Prescribe Medication

The warning message will change depending upon the Transmission selected (see Figures 6 and 7 for applicable text). If you do not modify the medication form to one that contains a valid NDC code and click the **Next** button, another warning message will be generated based on the Transmission selected. If **E-Prescribe** is selected in the Transmission field, the warning message will appear, and you will not be able to continue prescribing the currently selected medication.

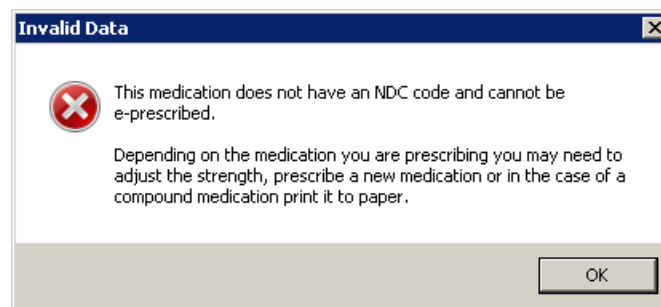


Figure 6 – Invalid Data Warning (Transmission – E-Prescribe)

## Added Features (continued)

### Medication – Prescribe Medication (continued)

If **Hand prescription to patient** is selected in the Transmission field, the warning message will appear, and you will have the option of continuing to prescribe the currently selected medication or canceling and modifying the medication form. See Figure 7.

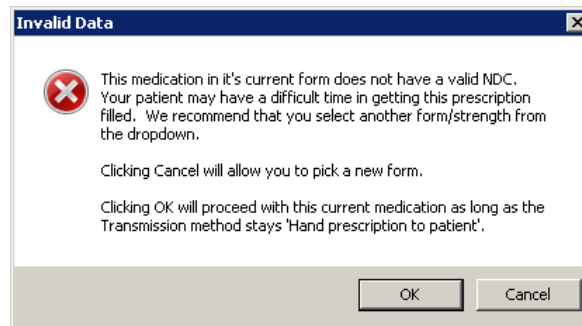
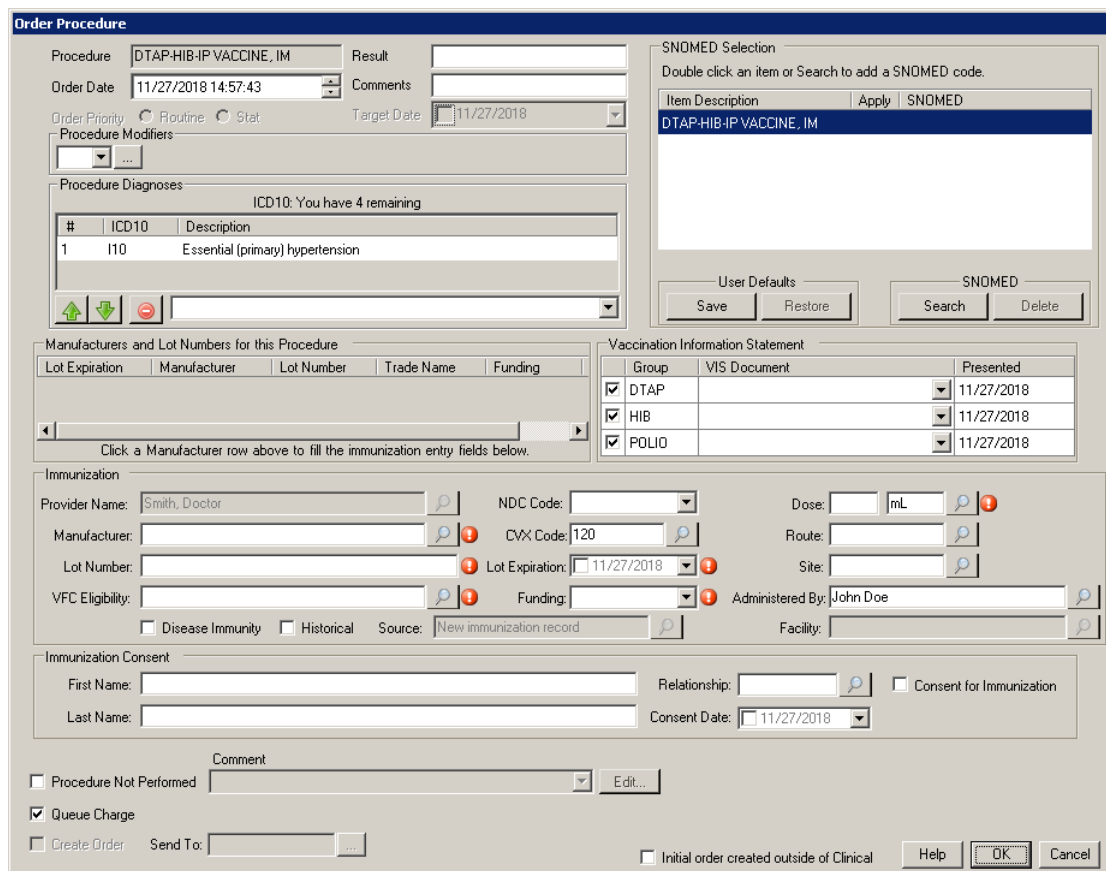


Figure 7 – Invalid Data Warning (Transmission – Hand prescription to patient)

- **The Note Tab – Order Procedure – Immunizations** – The Order Procedure dialog has been updated so whenever you are adding or editing an immunization procedure, and there is an immunization registry (DelVax, MD Immunet, NJIIS, NYSIIS, PSAIIS, PhilaVax, VIIS, etc.) configured in your system, the **Provider Name, Manufacturer, Lot Number, Lot Expiration, VFC Eligibility, Funding, and Dose** (including unit of measure) fields are required before you will be able to save the procedure information. A red exclamation point will appear next to the field that is missing the required information. See Figure 8. However, these requirements are bypassed if the **Disease Immunity, Historical, or Procedure Not Performed** options are selected, or if there are no immunization registries configured in your system.



The image shows the "Order Procedure" dialog box for immunizations. It contains several sections:

- Procedure:** DTAP-HIB-IP VACCINE, IM. Order Date: 11/27/2018 14:57:43. Target Date: 11/27/2018.
- Procedure Diagnoses:** ICD10: You have 4 remaining. Table with 1 row: # 1, ICD10 I10, Description Essential (primary) hypertension.
- SNOMED Selection:** Double click an item or Search to add a SNOMED code. Table with 1 row: Item Description DTAP-HIB-IP VACCINE, IM, Apply, SNOMED.
- Manufacturers and Lot Numbers for this Procedure:** Table with columns: Lot Expiration, Manufacturer, Lot Number, Trade Name, Funding.
- Vaccination Information Statement:** Table with columns: Group, VIS Document, Presented. Rows: DTAP (11/27/2018), HIB (11/27/2018), POLIO (11/27/2018).
- Immunization:** Provider Name: Smith, Doctor. NDC Code: [empty]. Dose: [empty] mL. Manufacturer: [empty]. CVX Code: 120. Route: [empty]. Lot Number: [empty]. Lot Expiration: 11/27/2018. Site: [empty]. VFC Eligibility: [empty]. Funding: [empty]. Administered By: John Doe. Source: New immunization record. Facility: [empty].
- Immunization Consent:** First Name: [empty]. Relationship: [empty]. Consent for Immunization: [empty]. Last Name: [empty]. Consent Date: 11/27/2018.
- Procedure Not Performed:** [empty].
- Queue Charge:** [checked].
- Create Order:** [empty]. Send To: [empty].
- Initial order created outside of Clinical:** [empty].

Figure 8 – Order Procedure – Immunization

## Added Features (continued)

- **Preferences – Labs** – The **Labs** tab, in the Preferences dialog, has been updated with an **Importing Labs** section and a **Sending Labs to PatientPortal** section. See Figure 9. The Importing Labs section contains the lab reminder color options for the To-Do List when importing labs, that were available in previous versions. The Sending Labs to PatientPortal section contains a new **Upon signing, only send labs to patient portal if the provider is the ordering provider** option. When this option is selected, only those labs where the provider appears as the ordering provider will be automatically sent to the PatientPortal upon signing. This allows you to easily exclude those labs where the provider is listed on the lab report, such as “Copy To” lab reports, but is not the actual ordering provider, from automatically being uploaded to the PatientPortal. Additionally, if this option is selected, these labs can be manually sent to the PatientPortal, as needed, by right-clicking the individual lab note, and then clicking the **Send note for Patient Access**.

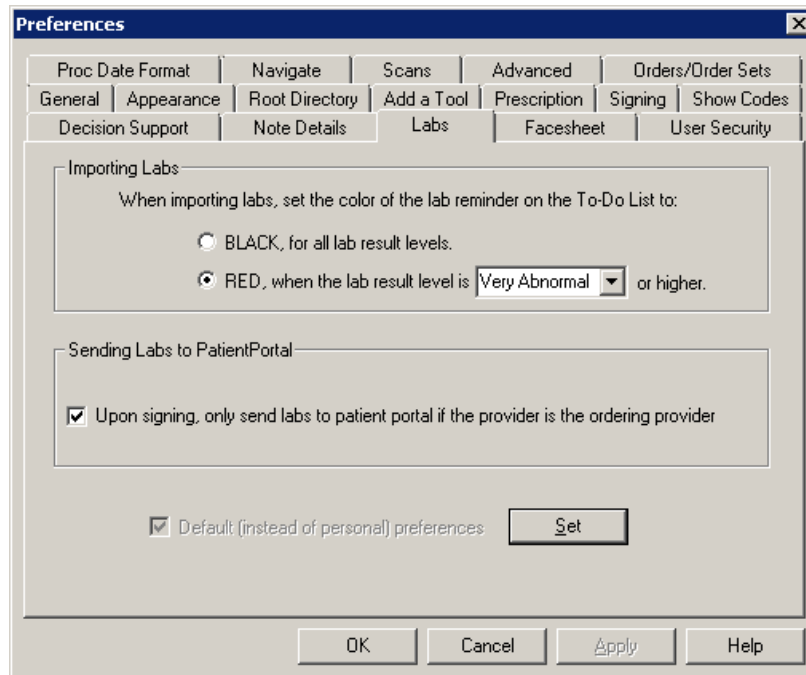
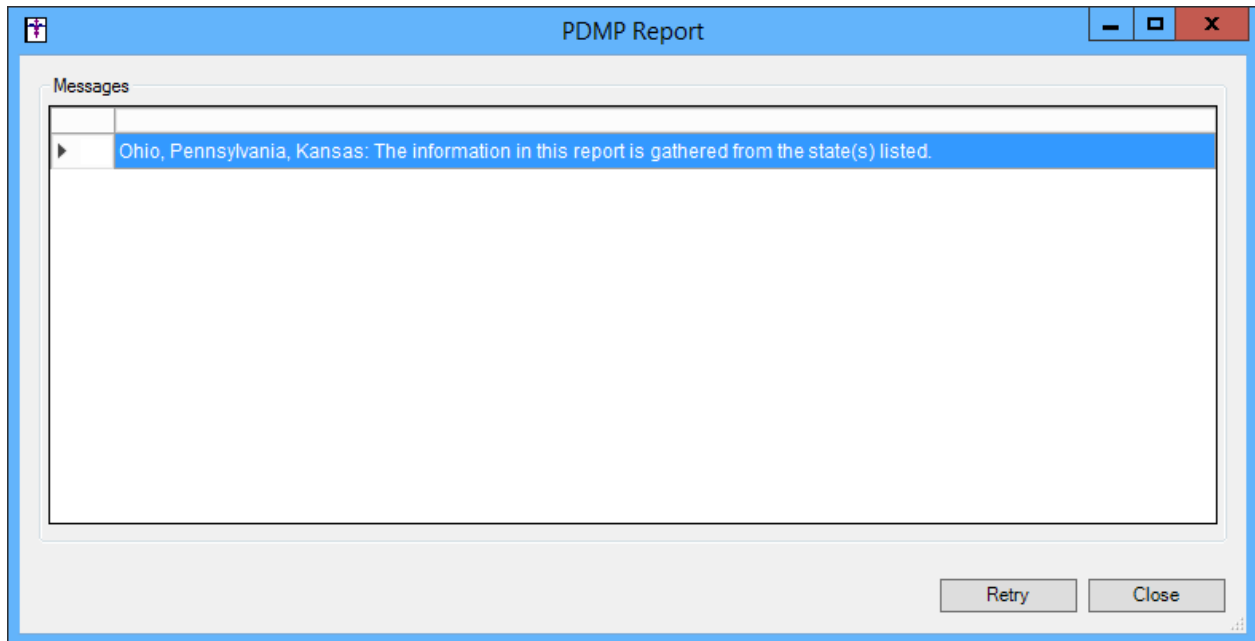


Figure 9 – Preferences – Labs

## Added Features (continued)

- **PDMP Report** – The PDMP Report dialog (accessed via the **PDMP Report** button in the Prescribe Medication dialog, or via **Chart > PDMP Report** when in a patient's chart), has been updated to display the state programs that were used when generating the PDMP report. See Figure 10. Each message included with the report will contain the state, or states, in which the message and/or report was generated.



**Figure 10 – PDMP Report**

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