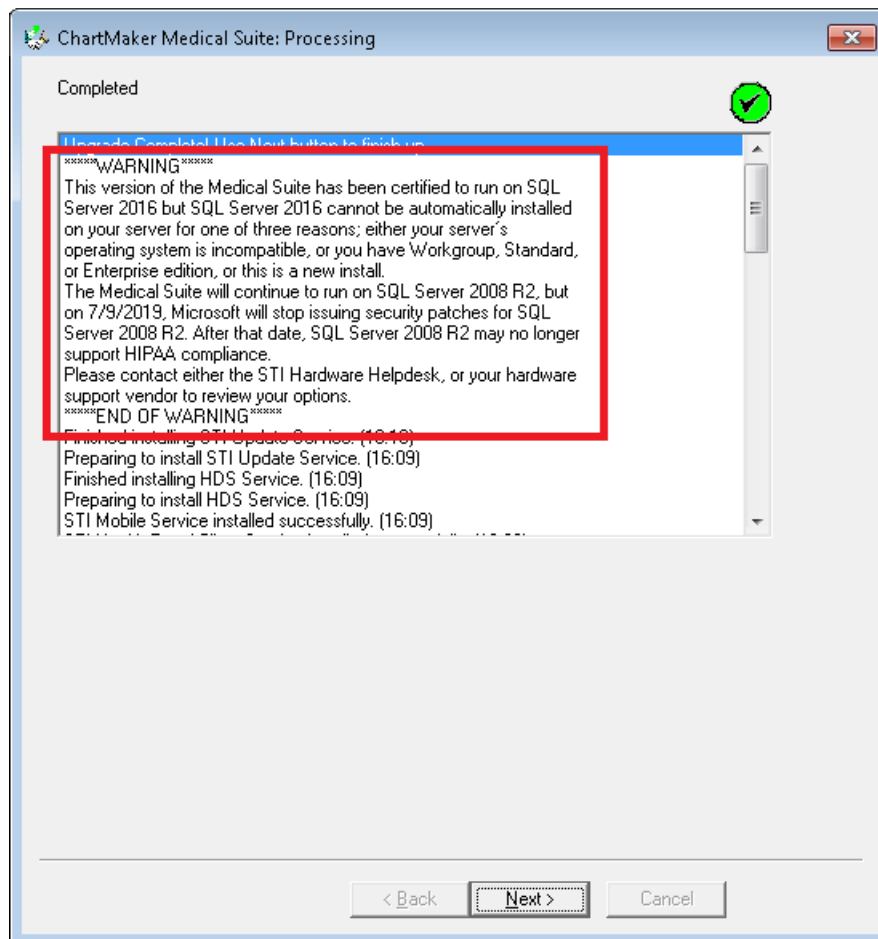


ChartMaker® Clinical Release Notes

ChartMaker® 2018.2 (fv6.3.5)

Important Notifications

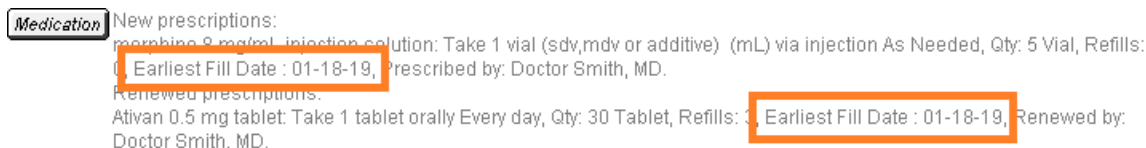
- **Upgrade from Microsoft Server 2008 and Windows 7** – In January 2020, your Windows 7 workstations and Microsoft 2008 Servers will no longer be supported. Even with security patches, **problems may still arise** if you choose not to upgrade. In addition, your workstations will no longer be HIPAA compliant.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

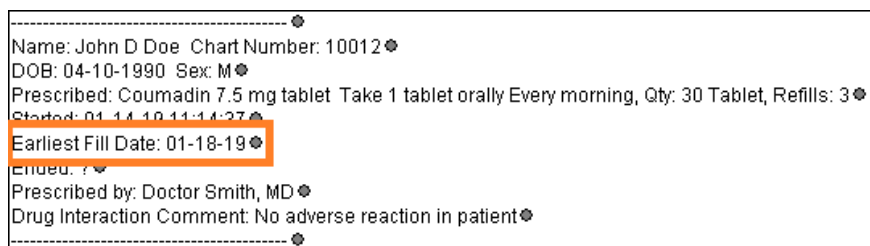
Added Features

- **Audit Trail** – The Audit Trail has been updated so that when tracking when a note has been copied (**Edit > Copy Note**), when an audit event occurs, the Audit Trail Description will display the **Note Heading**; and the **Note ID** and **Visit Date** will be listed in the Metadata column. All other fields will contain the same information as previous versions.
- **Immunization Registry – NYSIIS** – The system has been updated so that the New York State Immunization Information System (NYSIIS), in conjunction with the ChartMaker® Medical Suite, utilizes 2.5.1 v1.5 HL7 bidirectional messaging and exchange of vaccine (immunization) information. Once the system is set up, and you are enrolled with NYSIIS, immunization records will be automatically sent to the NYSIIS when the immunization record is saved (via the **Next Account** button) in the Immunization sub-tab of Clinical tab in Practice Manager, or when a chart note is saved or closed in the Clinical application.
- **Medications** – The system has been updated so that whenever a medication prescription fails to send due to an error on the health portal client server, a system message will be sent to the prescribing provider indicating that there was problem sending the medication. The To-Do List message will be a high priority message and appear in red. When the double-clicking the message, the patient’s chart will open, and the applicable medication will appear in the facesheet in red and prefaced with an **[ERROR]** indicator. You can then interact with the errored medication (requeue and resend, renew, or discontinue, etc.) as needed, like other errored medications.
- **Medications** – The various medication screens throughout the system (Find a Medication, Prescribe Medication, Medication Information, Medication Eligibility, Consent, Confirm Medication, etc.) have been updated with a white background. Likewise, all buttons, drop-down lists, and disabled text controls will appear with a light gray color.
- **Medications** – The system has been updated so that whenever you are adding or renewing a medication, either in the chart note, or via the facesheet, and an **Earliest Fill Date** has been configured, that date will output into the chart note and/or Auto-generated drug log. See Figures 1 and 2.



Medication New prescriptions:
morphine 8 mg/ml injection solution: Take 1 vial (sdv,mdv or additive) (mL) via injection As Needed, Qty: 5 Vial, Refills: 0, **Earliest Fill Date : 01-18-19**, Prescribed by: Doctor Smith, MD.
Renewed prescriptions:
Ativan 0.5 mg tablet: Take 1 tablet orally Every day, Qty: 30 Tablet, Refills: 0, **Earliest Fill Date : 01-18-19**, Renewed by: Doctor Smith, MD.

Figure 1 – Chart Note – Medication – Earliest Fill Date



Name: John D Doe Chart Number: 10012
DOB: 04-10-1990 Sex: M
Prescribed: Coumadin 7.5 mg tablet Take 1 tablet orally Every morning, Qty: 30 Tablet, Refills: 3
Started: 01-14-19 11:14:27
Earliest Fill Date: 01-18-19
Renewed: ?
Prescribed by: Doctor Smith, MD
Drug Interaction Comment: No adverse reaction in patient

Figure 2 – Auto-generated Drug Log – Earliest Fill Date

- **Medications – EPCS** – The system has been updated to work with HID USB Tokens and ActivClient software, available from IdenTrust, for performing two-factor authentication when electronically prescribing controlled substances. Do note, that users currently using SafeNet USB tokens and accompany software for performing two-factor authentication for EPCS, can continue to use them and renew certificates for a total of 8 years (the initial application, plus 3 renewals), and will only need to migrate to the HIB USB Tokens after the certificate renewals for their SafeNet USB tokens have ended.
- **Medications – Prescription Layout Tool** – The Prescription Layout Editor has updated with an earliest fill date (**EFILL**) tag that allows you to include the earliest fill date for the medication you are prescribing for the patient, if needed.

Added Features (continued)

- **The Note Tab – Family History** – The **Relationship** drop-down list, in the Add New Relationship dialog (accessed via Add New Relationship button in the Family History dialog), has been updated with a **Nephew** and **Niece** option, allowing you to configure family history information for those types of relations. See Figure 3.

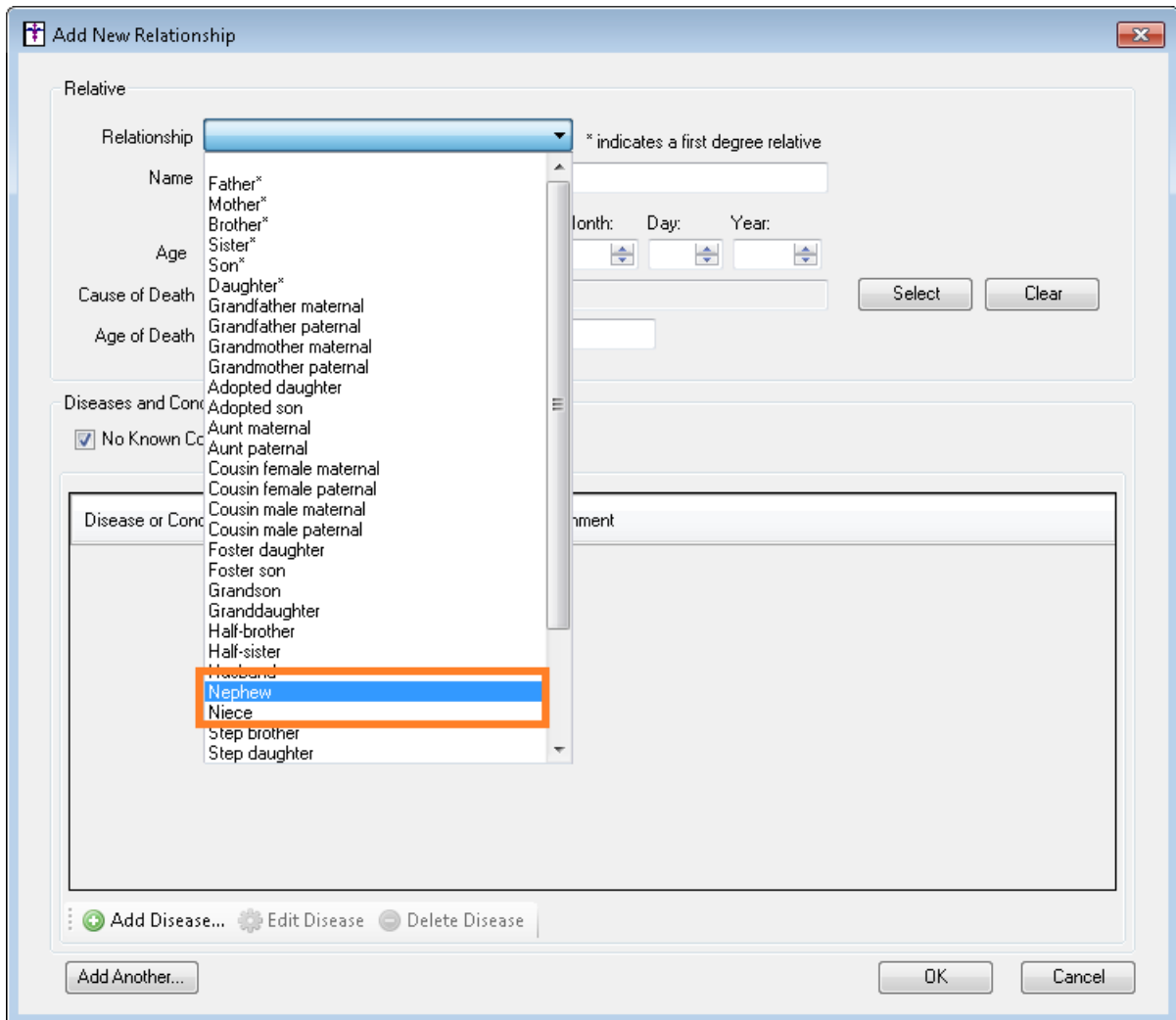


Figure 3 – Family History – Add New Relationship

Added Features (continued)

- **Preferences – Note Details** – The **Note Details** tab, in the Preferences dialog, has been updated with a **Screening Note Output** section, that allows you to configure the default method of output (**Title only**, **List**, or **Paragraph**) for the Screening widget. See Figure 4. Do note, that these default options are user-based, and will be configured for the user that is logged into the system when configuring this preference. Whenever a Screening is opened in a patient’s chart, the Note Output option for each screening in the dialog will default to the option selected. You can then manually change this option in the Screening dialog as needed.

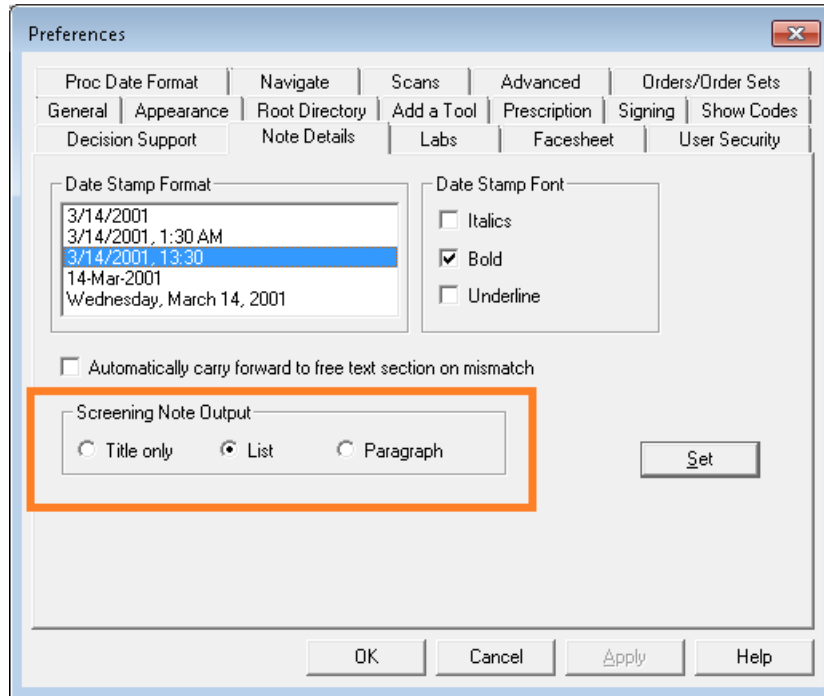


Figure 4 – Preferences – Note Details

Added Features (continued)

- **System Login** – The Login screen for Clinical has been redesigned to include our new corporate logo, as well as a **Did you know?** section, on the right side of the screen, to better inform you of various new features within the ChartMaker Medical Suite, as well as additional services that STI offers. See Figure 5. Logging into Clinical is similar as before, by entering the **User ID** and **Password**, and then clicking the **Sign In** button. Likewise, if your system has multiple databases, a **Database** field will be appear allowing you to select the applicable database.

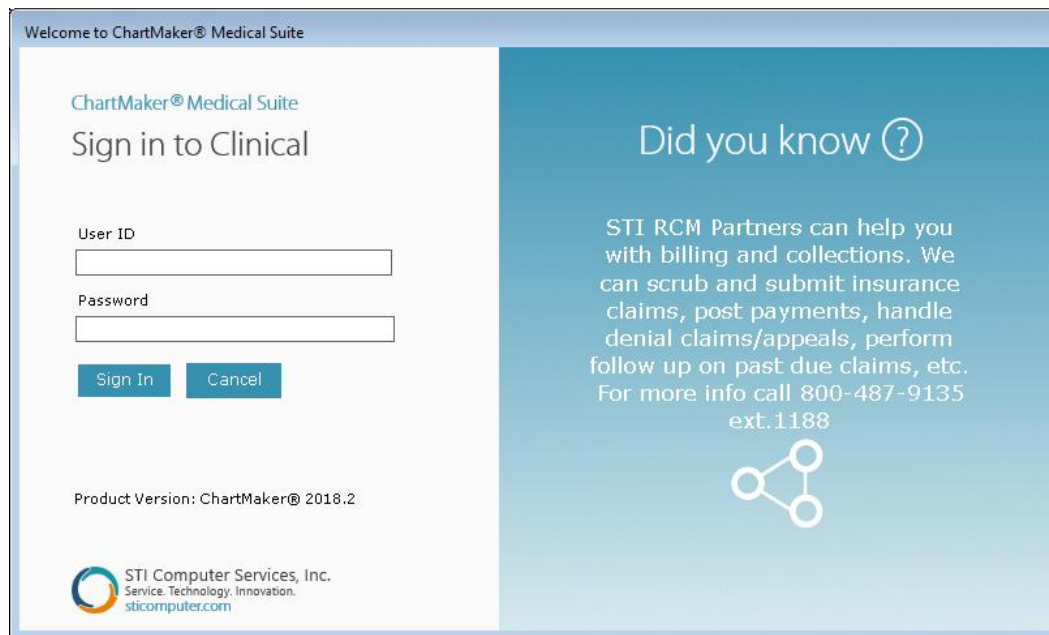


Figure 5 – Welcome to ChartMaker® Medical Suite

After you have successfully logged on, a new splash screen will appear listing the various services and solutions STI provides. See Figure 6.

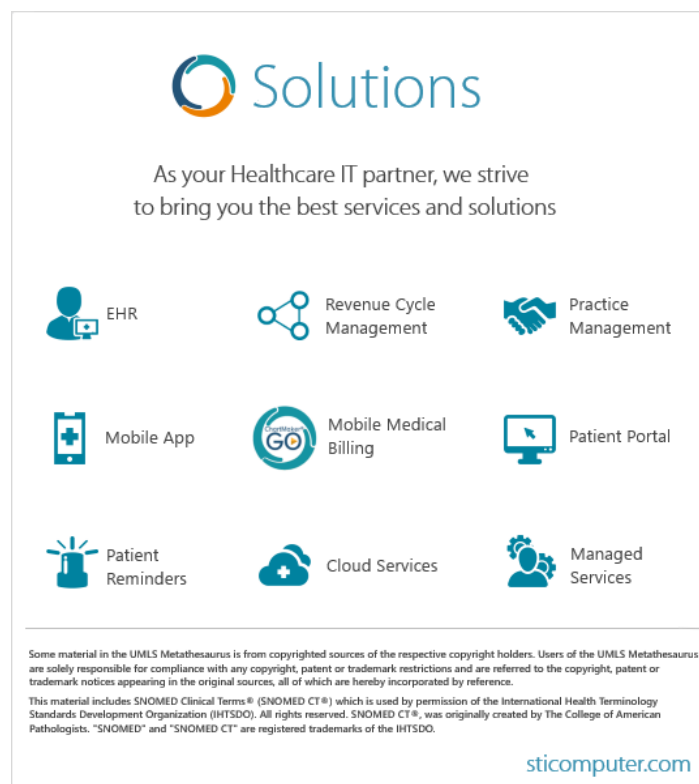


Figure 6 – Solutions – Splash Screen

Added Features (continued)

- **Template Editing – Lookup** – The Lookup Properties dialog (accessed by right-clicking the **Lookup** widget in the Template Editor, and then clicking **Edit Properties**) has been updated to include 3 new Fields that you can select when Patient is selected in the Source field: **Phone: Primary Cell**, **Phone: Primary Home**, and **Phone: Primary Work**. See Figure 7. When any of these options are selected, the applicable phone number will output in to the chart note, if that number is configured for the patient.

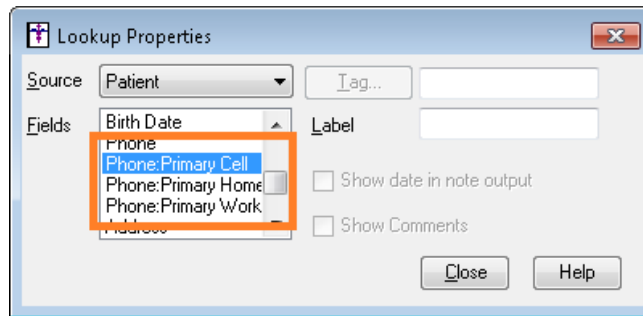


Figure 7 – Lookup Properties

- **Template Editing – Vital Signs** – The Vital Signs Preferences dialog (accessed by right-clicking the **Vitals** widget in the Template Editor, and then clicking **Edit Properties**) has been updated so that when entering **High warning above** and **Low warning below** values, as well as **Absolute maximum** and **Absolute minimum** values, for the various vital items, the high value must be greater than the low value. Likewise, the high value cannot be greater than the absolute maximum, nor the low value be lower than the absolute minimum. If these conditions are not met, the system will produce a warning, and you will not be able to continue until the values meet the high/low and minimum/maximum conditions. See Figure 8.

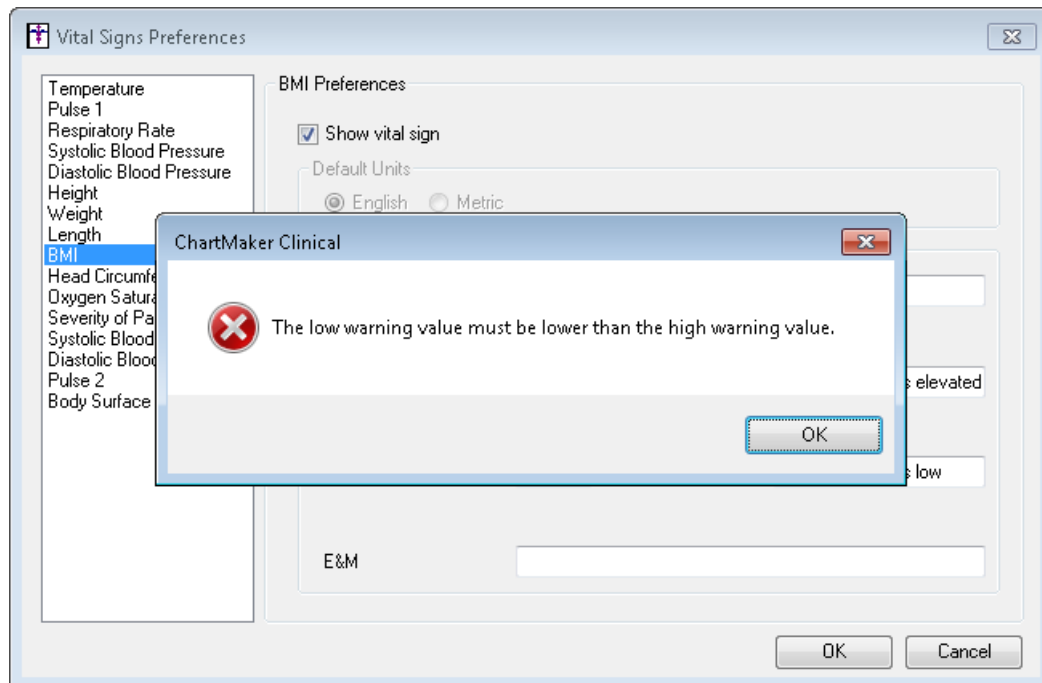


Figure 8 – Vital Signs Preferences – Value Warning

Added Features (continued)

- To-Do List** – The To-Do List has been updated with the ability to filter to-do list items by Subject. By clicking the Subject heading you can sort in ascending order, or, by clicking the Subject heading again, in descending order. Likewise, you can select a Subject heading to view by clicking the corresponding drop-down list. See Figure 9. Do note, however, when selecting a specific subject via the drop-down list, the drop-down list will only contain those subjects contained on the page of the To-Do List you are currently viewing. This updated functionality also works in a similar manner in the “floating” To-Do List dialog (accessed by clicking **To-Do > View To-Do List**).

To-Do List for: John Doe (JD)

Priority:

Date	From	Priority	Subject	Type	Patient	Start	Target	Complete	RRR
07/2	[All]		GENERAL Progress Note	Unsigned Note	Doe, Jennifer				
09/1			HEMOGLOBIN & HEMATOCRIT No Provider Found. No acct number.	Unsigned Note	Doe, Jane				
09/20/2016			MEANINGFUL USE STANDARD GENERAL E&M	Unsigned Note	Doe, Jennifer				
11/17/2016		Normal	GENERAL Progress Note	Unsigned Note	Doe, Carl				
03/10/2017		Normal	GENERAL Progress Note	Unsigned Note	Doe, Rene				
04/06/2017		Normal	GENERAL Progress Note	Unsigned Note	Doe, Jane				
04/10/2017		Normal	GENERAL Progress Note	Unsigned Note	Doe, Rene				
06/01/2017		Normal	GENERAL Progress Note	Unsigned Note	Doe, John				
08/24/2017		Normal	GENERAL Progress Note	Unsigned Note	Doe, John				
11/29/2017		Normal	GENERAL Progress Note	Unsigned Note	Doe, John				
01/23/2015		High	HEMOGLOBIN & HEMATOCRI...	Lab Result	TEST, BMC FAITH				
01/23/2015		High	HEMOGLOBIN & HEMATOCRI...	Lab Result	TEST, BMC FAITH				
01/27/2015		High	HEMOGLOBIN & HEMATOCRI...	Lab Result	TEST, BMC FAITH				
01/27/2015		High	HEMOGLOBIN & HEMATOCRI...	Lab Result	TEST, BMC FAITH				
01/27/2015		High	HEMOGLOBIN & HEMATOCRI...	Lab Result	TEST, BMC FAITH				
05/14/2014		Normal	MEANINGFUL USE STANDAR...	Unsigned Note	Doe, Jennifer				
08/05/2014		Normal	MEANINGFUL USE STANDAR...	Unsigned Note	Smith, John				
09/04/2014		Normal	MEANINGFUL USE STANDAR...	Unsigned Note	Smith, -				

126-150 of 784 items

RRR = Read Receipt Requested Show Completed Items

Figure 9 – The To-Do List

Added Features (continued)

- To-Do List** – The To-Do List has been updated so that when any provider, or user attached to a provider, logs into Clinical, an informational banner will appear at the bottom of the To-Do List, providing critical information, clinical claims, formulary changes, and financial offers based on the providers area and specialty. See Figure 10. If you click the banner, a separate browser window will open containing additional information regarding the banner topic. Likewise, if you take any action in the To-Do List, or open a patient’s chart, etc. the informational banner will disappear.

To-Do List for: John Doe (JD)

Buttons: New, Delete, View, Transfer, Print, Refresh, Priority: [Up/Down arrows]

Date	From	Priority	Subject	Type	Patient	Start	Target	Complete	RRR
01/07/2019		Normal	GENERAL E&M	Unsigned Note	Doe, John				
11/27/2018		Normal	GENERAL E&M	Unsigned Note	Smith, Frank				
11/27/2018		Normal	GENERAL E&M	Unsigned Note	Doe, Jane				
11/27/2018		Normal	GENERAL E&M	Unsigned Note	Doe, Abbey				
11/21/2018		Normal	GENERAL E&M	Unsigned Note	Doe, John				
11/19/2018		Normal	GENERAL E&M	Unsigned Note	Doe, John				
10/05/2018		Normal	GENERAL E&M	Unsigned Note	Doe, Jane				
09/14/2018		Normal	GENERAL E&M	Unsigned Note	Doe, Jane				
09/14/2018		Normal	GENERAL E&M	Unsigned Note	Doe, John				
07/10/2018		Normal	GENERAL E&M	Unsigned Note	Doe, John				
07/10/2018		Normal	GENERAL E&M	Unsigned Note	Doe, John				
05/31/2018		Normal	GENERAL E&M	Unsigned Note	Doe, John				
05/10/2018		Normal	GENERAL E&M	Unsigned Note	Doe, John				
04/20/2018		Normal	GENERAL E&M	Unsigned Note	Doe, John				
04/16/2018		Normal	GENERAL E&M	Unsigned Note	Doe, Flo				
03/01/2018		Normal	Progress Note	Unsigned Note	Doe, John				
03/01/2018		Normal	Progress Note	Unsigned Note	Doe, John				
03/01/2018		Normal	Progress Note	Unsigned Note	Doe, Flo				
03/01/2018		Normal	Progress Note	Unsigned Note	Doe, Abbey				
03/01/2018		Normal	Progress Note	Unsigned Note	Doe, Carl				
02/05/2018		Normal	GENERAL E&M	Unsigned Note	Doe, Jane				
02/05/2018		Normal	GENERAL E&M	Unsigned Note	Doe, Jane				
01/14/2018		Normal	GENERAL E&M	Unsigned Note	Doe, Jane				

1-25 of 784 items | RRR = Read Receipt Requested | Show Completed Items

ProAir RespiClick
(albuterol sulfate) Inhalation Powder

Consider adding ProAir RespiClick to ensure your patient's rescue therapy is delivered from the same device platform.

IMPORTANT SAFETY INFORMATION
Full Indication Full Prescribing Information
drugs in patients with asthma.
recommended dose
Immediate hypersensitivity reactions

Figure 10 – The To-Do List – Informational Banner

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