ChartMaker® Clinical Release Notes

ChartMaker® 2018.2 (fv6.4.1)

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 HIPPA compliant, it is important to contact either STI Hardware Helpdesk, or your software vendor, to review your options.
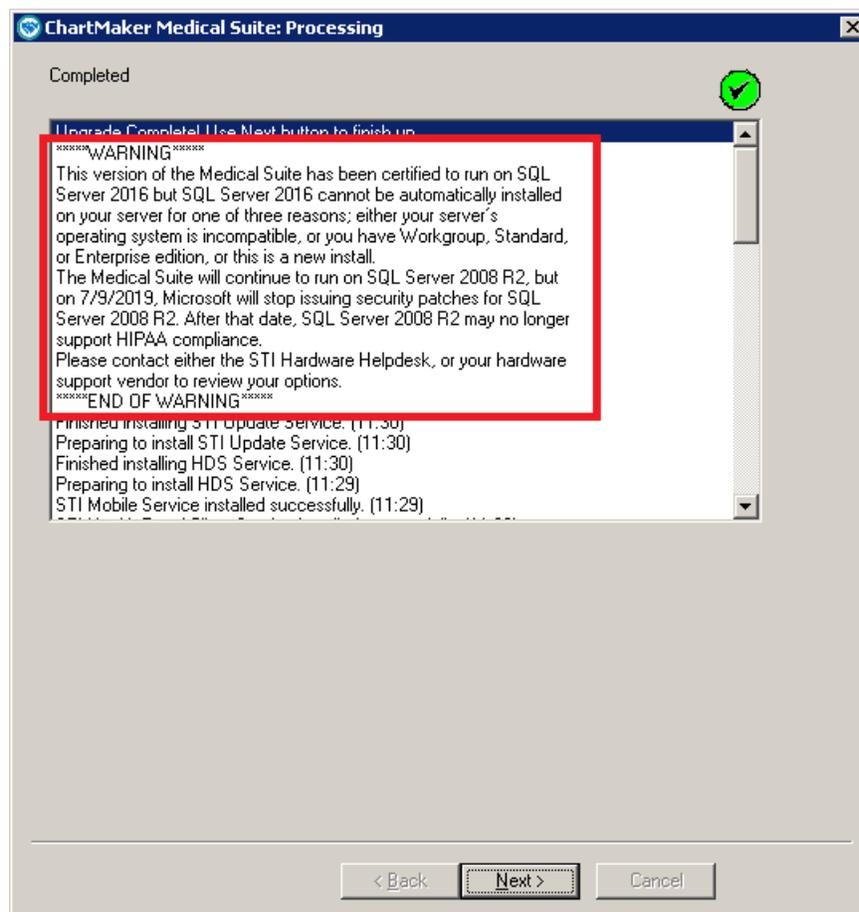
ChartMaker Medical Suite SQL Server 2016 Warning

Added Features

- **API Access** – When enabling a patient for API Access (**Chart** > **API Access** when in a patient's chart), the email and/or printout message has been updated to provide a clearer indication of what API Access entails and how it is used. See Figure 1.

> **From:** ChartMaker® PatientPortal <noreply@chartmakerpatientportal.com>
> **Sent:** Wednesday, August 28, 2019 11:00 AM
> **To:** ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮
> **Subject:** API Access
>
> Dear Tony,
>
> In addition to viewing your health information in the Chartmaker® Patient Portal offered by Fictional Physicians, you can now use any participating third - party application to view your health information 24 hours a day.
>
> This is an optional service. If you are interested in using a third party, please provide them with the authentication code listed below.
>
> **FictionalDrsYQvZZpSl**
>
> This authentication code is case sensitive. Please allow up to 1 hour for your health information to become available.

Figure 1 – API Access Message

- **Audit Trail –** The Audit Trail has been updated to track whenever a new internal To-Do List Message is created. When an audit event occurs, the Event column will display **Created**; the Group column will display **To-Do List**; the Audit Trail Description will display the **To-Do List Message Created**; the New Value will display the message **[Subject] – [Body]**; and the recipients in the **To**, **CC**, and **From** fields will be listed in the Metadata column.

- **Audit Trail –** The Audit Trail has been updated to track whenever a read notification is sent for an internal To-Do List Message. When an audit event occurs, the Event column will display **Created**; the Group column will display **To-Do List**; the Audit Trail Description will display the **To-Do List Message Read Notification Created**; the Old Value will display the original message **[Subject] – [Body]**; the New Value will display the message **[Subject] – [Body]** and any changes or updates (read, deleted, etc.) that were made; and the recipients in the **To**, **CC**, and **From** fields will be listed in the Metadata column.

- **Audit Trail –** The Audit Trail has been updated to track whenever an internal To-Do List Message has been replied to. When an audit event occurs, the Event column will display **Replied**; the Group column will display **To-Do List**; the Audit Trail Description will display the **To-Do List Message Modified**; the Old Value will display the original message **[Subject] – [Body]**; the New Value will display **RE: [Subject] – [Body]**, any changes and updates to the subject and/or body, and the message string; and the recipients in the **To**, **CC**, and **From** fields will be listed in the Metadata column.

- **Audit Trail –** The Audit Trail has been updated to track whenever an internal To-Do List Message is forwarded. When an audit event occurs, the Event column will display **Created**; the Group column will display **To-Do List**; the Audit Trail Description will display the **To-Do List Message Created**; the Old Value will display the original message **[Subject] – [Body]**; the New Value will display **FW:** updated message **[Subject] – [Body]** and the forwarded message string; and the recipients in the **To**, **CC**, and **From** fields will be listed in the Metadata column.

- **Audit Trail –** The Audit Trail has been updated to track whenever an internal To-Do List Message is deleted. When an audit event occurs, the Event column will display **Deleted**; the Group column will display **To-Do List**; the Audit Trail Description will display the **To-Do List Message Deleted**; the Old Value will display the message **[Subject] – [Body]** and any message string at the time of deletion; and the recipients in the **To**, **CC**, and **From** fields will be listed in the Metadata column.

Added Features (continued)

- **The ID Tab – Consent –** The Medication History Consent section, of the Consent dialog, has been updated so that the Provider drop-down field has been removed. See Figure 2. With the update to the NCPDP 2017071 schema format, you can no longer request medication history for an individual provider.

Figure 2 – Consent

- **Immunization Registry – Florida Shots –** The system has been updated so that the Florida Shots Immunization Registry, 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 FL Shots, immunization records will be automatically sent to the FL Shots 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.

Added Features (continued)

- **Medications – Medication History –** The ChartMaker Medical Suite has been updated to use the latest, NCPDP 2017071 schema, format for requesting and receiving medication history.

- **Medications – Medication History –** The Medication History dialog has been updated so that when receiving incomplete medication history information from Surescripts, an **Incomplete History** pop-up warning will appear outlining the issue. See Figure 3. When this type of message is received a **Retry** button will appear to attempt to receive the complete medication history and will no longer appear once the complete history is received. When the Reply button is clicked, a **Request Pending** dialog will appear detailing the progress of the medication history retrieval. You can click the **Close** button to exit this dialog, if needed. In addition, whenever you receive an Incomplete History warning, this information will be tracked in the audit trail.

Figure 3 – Medication History

- **The Note Tab – Diagnosis –** The **ICD10 Code Set** field, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with an **October 1, 2019 – Sept 30, 2020** code set when searching for diagnosis codes or using the crosswalk functionality. You can toggle between the Oct 1, 2014 – Sept 30, 2016 code set, the Oct 1, 2016 – Sept 30, 2017 code set, the Oct 1, 2017 – Sept 30, 2018 code set, the Oct 1, 2018 – Sept 30, 2019 code set, and All ICD10 Codes, in addition to this new code set. This allows you to easily search for the applicable ICD10 codes that are active, as outlined by the CDC, for the applicable date ranges. When accessing the Diagnosis Search dialog when adding or editing a diagnosis in the chart note, the system will default to the code set based on the **Note Date** to ensure that the proper ICD codes for that date are selected.

Added Features (continued)

- **Reports – HIE Consent Report –** The system has been updated with a new HIE Consent Report dialog (**Reports > HIE Consent Report**) that allows you to view HIE export and import consent information for patients for a specified date range, as well as the type of Export and Import Consent. See Figure 4.

  When first accessing the HIE Consent Report dialog, the Select Consent Criteria section will default the **From** and **To** date fields to 3 months into the past from the current date, the **Export Consent** will default to **Yes**, and the **Import Consent** will default to **Not Asked**. You can modify the select criteria as desired. Please note that patients with default value for Import Consent will not have a date stored in the database, therefore, these records will be displayed regardless of the selected date range.

  When the select criteria has been configured as desired, click the **Run Report** button to view the applicable patients.

  Whenever there are any results available, the **Save** button will become activated, allowing you to save a PDF file of the results. After running the report, the number of patient records found will appear at the bottom left of the dialog in red.

Figure 4 – STI Quality Reporting Dashboard

- **System Tables – Diagnosis Search –** The **ICD10 Code Set** field, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with an **October 1, 2019 – Sept 30, 2020** code set when searching for diagnosis codes or using the crosswalk functionality. You can toggle between the Oct 1, 2014 – Sept 30, 2016 code set, the Oct 1, 2016 – Sept 30, 2017 code set, the Oct 1, 2017 – Sept 30, 2018 code set, the Oct 1, 2018 – Sept 30, 2019 code set, and All ICD10 Codes, in addition to this new code set. This allows you to easily search for the applicable ICD10 codes that are active, as outlined by the CDC, for the applicable date ranges. When accessing the Diagnosis Search dialog via the **Edit** > **System Tables** menu, the system will default to the code set based on the current day's date.