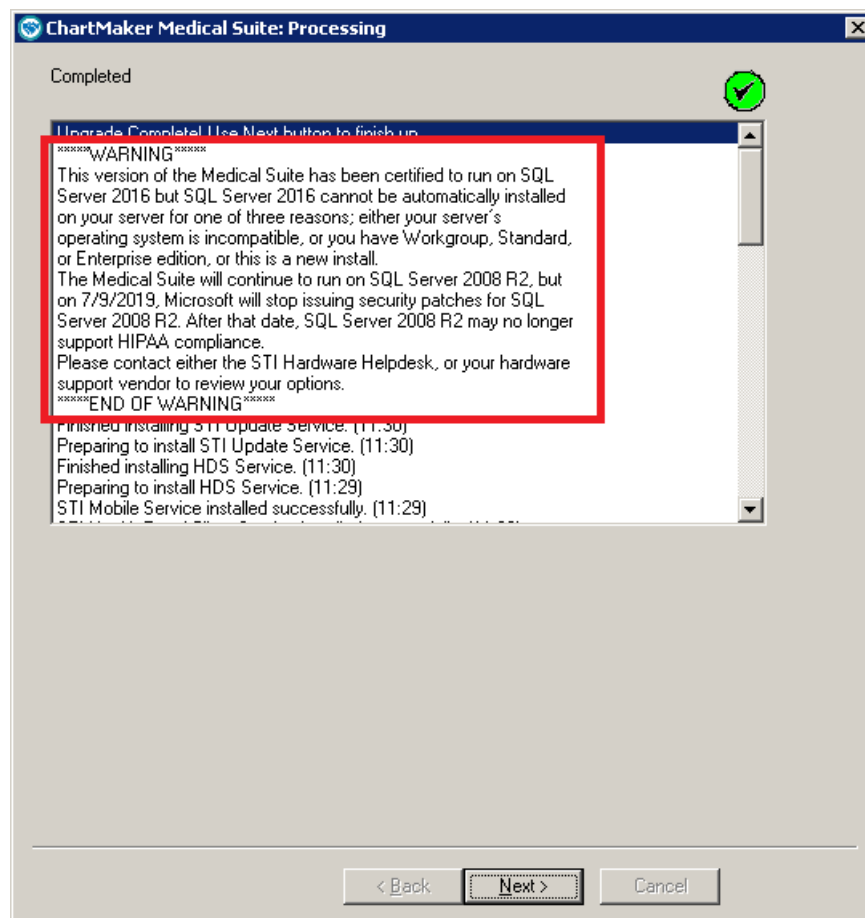


## ChartMaker® Clinical Release Notes

### ChartMaker® 2018.2 (fv6.4.2)

#### 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

- **Export – All Notes to File** – The export all functionality has been updated so that multi-page scans (SCAN and ICPN files) will now be exported as a single PDF file. Do note, in the rare cases where there is a PDF and a JPEG within the same scan, the system will separate the file types into individual files (for example, if a multi-page scan contains a PDF file and a JPEG, the export will contain 1 PDF file and 1 JPEG file, each representing that part of the scan).
- **Facesheet – Diagnosis List** – The Facesheet has been updated so that whenever viewing the details menu for a diagnosis in the Problem/Diagnosis List, Inactive Diagnosis List, or Pre-Existing Diagnosis, if that diagnosis is mapped to an HCC (Hierarchical Condition Categories) code, an **(HCC)** indicator will appear after the ICD10 code in the menu. See Figure 1.

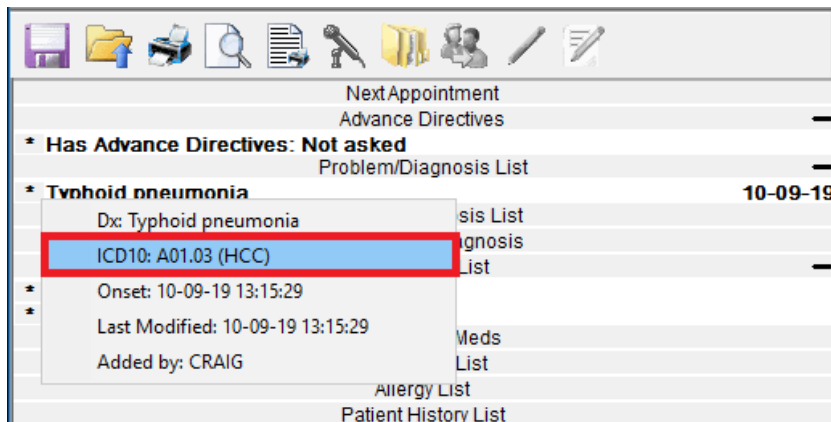
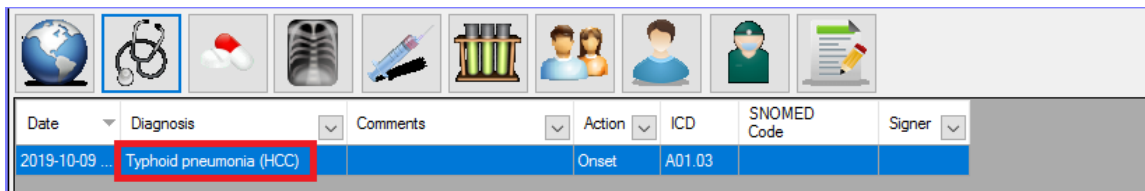


Figure 1 – Facesheet – Problem/Diagnosis List

- **The History Tab – Diagnosis** – The History tab has been updated so that whenever a diagnosis is mapped to an HCC (Hierarchical Condition Categories) code, an **(HCC)** indicator will appear after the diagnosis description in the Diagnosis and Name columns. See Figure 2.



Date	Diagnosis	Comments	Action	ICD	SNOMED Code	Signer
2019-10-09 ...	Typhoid pneumonia (HCC)		Onset	A01.03		

Figure 2 – History Tab

- **Immunization Registry – CT WiZ** – The system has been updated so that the Connecticut Immunization Information System (CT WiZ) 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 CT WiZ, immunization records will be automatically sent to the CT WiZ 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)

- **Import – Bulk Import of CCDAs** – The system has been updated with the ability to import a mass of CCDA files that are received from outside of the Clinical application. This new functionality is accessed via **Chart > Import > Bulk Import of CCDAs** and is accessible for all users.

After the Bulk Import of CCDAs option has been selected, a Bulk CDA Import dialog will appear allowing you to select the **Practice** in which you want to import the CCDAs and browse to the **Input Folder** where the CCDA files reside. See Figure 3. Once the practice and file location has been configured, you can click the **Import** button to begin the import process.

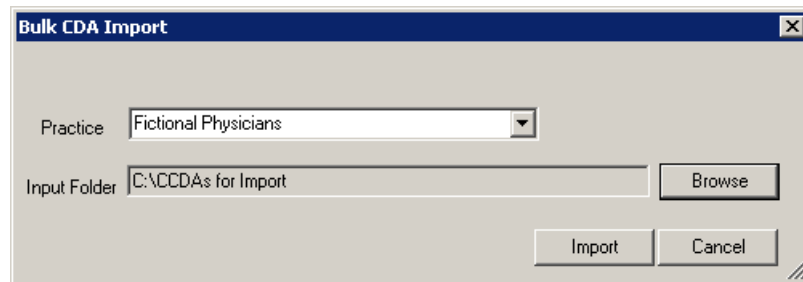


Figure 3 – Bulk CDA Import

Prior to importing the files in the input folder, the system will generate a confirmation message like the one in Figure 4. Click the **Yes** button to continue.

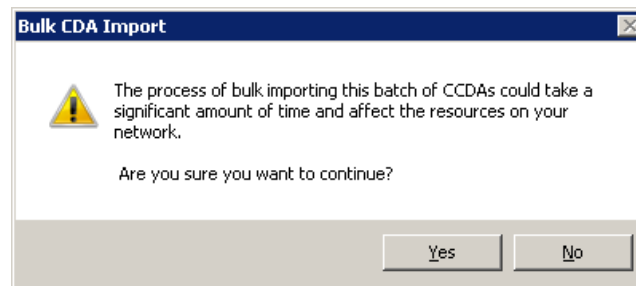


Figure 4 – Bulk CDA Import Confirmation Message

The system will then create 3 folders in the input directory (**Processed**, **Errors**, and **User Intervention Needed**), and begin processing the CCDA files. When importing the CCDAs, the system will look to match each of the CCDA files to an existing patient based on the demographic information inside the CCDA file. If the information in the file does not match a patient, a new patient will be created; if there is a single matched patient, a Document Import note will be added to that patient's chart; and if there are multiple patient matches, the CCDA will be moved to the **User Intervention Needed** folder and the user will have to manually import those files into the system using the import patient data functionality.

## Added Features (continued)

### Import – Bulk Import of CCDAs (continued)

When the import process is completed, a CDA Bulk Import Complete dialog will appear, and you can click the **OK** button. See Figure 5.

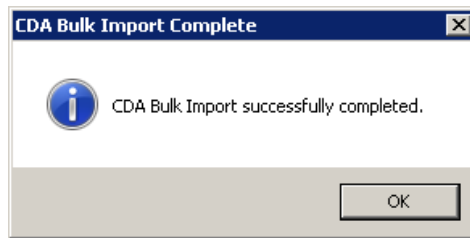


Figure 5 – CDA Bulk Import Complete

When a new patient is created, or there is a single matched patient, the Document Import note will be created for that patient, with the information contained in the corresponding CCDAs file, upon opening the patient's chart if the user has a **Charts** privilege of **Write** or higher. If the user does not have write privileges, or higher, then the patient's chart will open, but the new Document Import note will not be created.

Likewise, whenever an import is successful, the corresponding CCDAs file will be moved to the **Processed** folder in the input folder directory. If the import fails for some reason, the corresponding CCDAs file will be moved to the **Errors** folder in the input folder directory. And again, if there are any files that matched multiple patients, those CCDAs files will be moved to the **User Intervention Needed** folder in the input folder directory.

Additionally, after the import process is complete a Bulk CDA Import Summary document will be created outlining the input directory path, the Practice the patients were assigned, the date and time the import was completed, and a row will appear for each CCDAs file imported indicating the **Filename**, **Outcome** (Error, New Patient, Existing Patient, Multiple Matches), **Chart #**, and **Details** (type of error when the outcome is an error, or up to five matching patient chart numbers when outcome is multiple matches).

- **The Note Tab – Diagnosis** – The ICD10 Search and Crosswalk areas of the Diagnosis Search dialog have been updated so that whenever a diagnosis is mapped to an HCC (Hierarchical Condition Categories) code, an **(HCC)** indicator will appear after the diagnosis description to easily identify these diagnosis codes. See Figure 6.

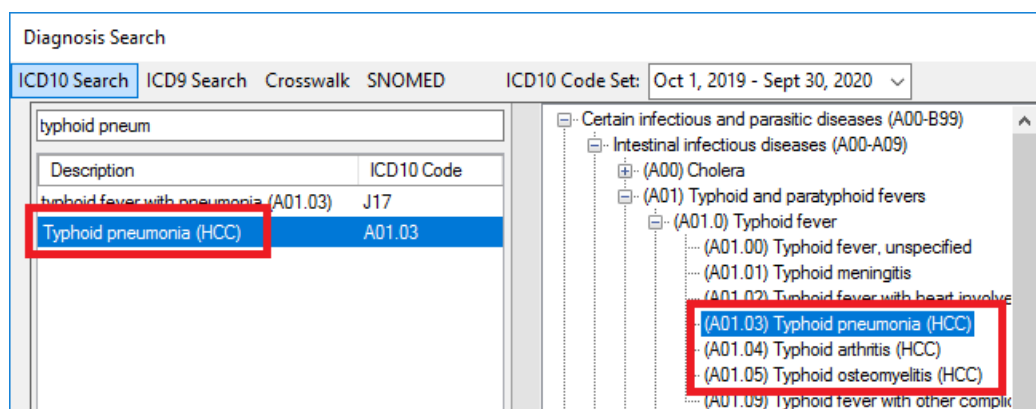


Figure 6 – Diagnosis Search

## Added Features (continued)

### The Note Tab – Diagnosis (continued)

Likewise, when a diagnosis selected for a patient in the Diagnosis checklist, an **(HCC)** indicator will also appear after the diagnosis description in the Diagnosis dialog for those diagnoses that are mapped to an HCC code. See Figure 7.

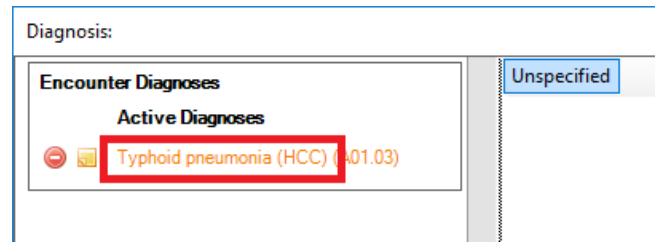


Figure 7 – Note – Diagnosis

And when outputted to the chart note, an **(HCC)** indicator will also appear after the diagnosis description for those diagnoses that are mapped to an HCC code. See Figure 8.



Figure 8 – Note – Diagnosis Checklist

- **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.
- **The Note Tab – Patient Demographic Warning Message** – The Patient Demographic Warning message that appears when attempting to save or close a patient's chart when another user has updated the demographic information for the same patient, has been updated to provide clearer guidance on how to proceed. See Figure 9 for an example of this message with the updated verbiage.

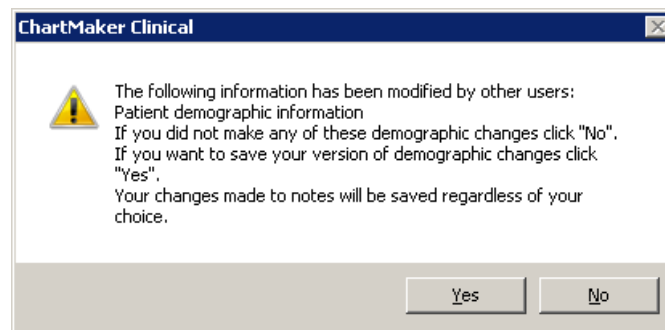


Figure 9 – Patient Demographic Warning Message

## Added Features (continued)

- **Reports – STI Quality Reporting Dashboard** – The Search By section, of the STI Quality Reporting Dashboard (**Reports > STI Quality Reporting Dashboard**), has been updated with a **Note Start** and a **Note End** date field that allows you to view all patient notes that were sent to the STI Quality Reporting Registry for a selected date range. See Figure 10. Do note, that the dates configured in these fields must have the same year. If the year is different, an error will be generated. All other functionality works the same as in previous versions.

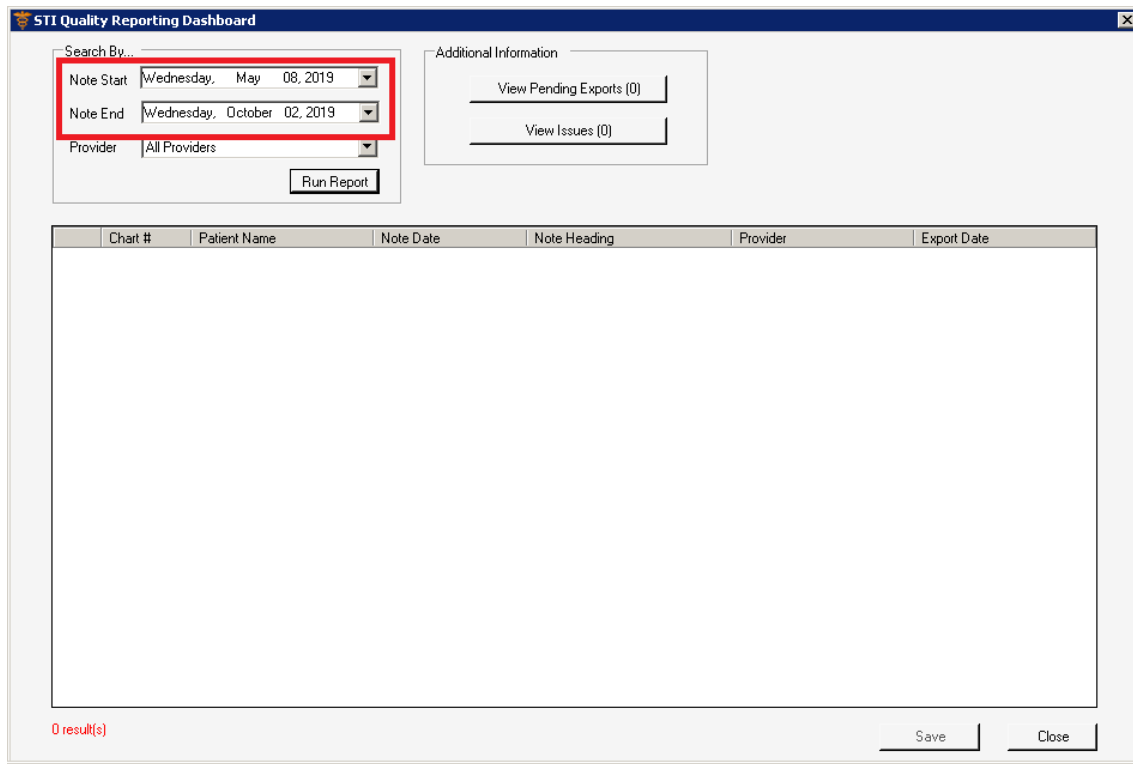


Figure 10 – STI Quality Reporting Dashboard

- **System Tables – Diagnosis Search** – The ICD10 Search and Crosswalk areas of the Diagnosis Search dialog have been updated so that whenever a diagnosis is mapped to an HCC (Hierarchical Condition Categories) code, an **(HCC)** indicator will appear after the diagnosis description to easily identify these diagnosis codes. See Figure 11.

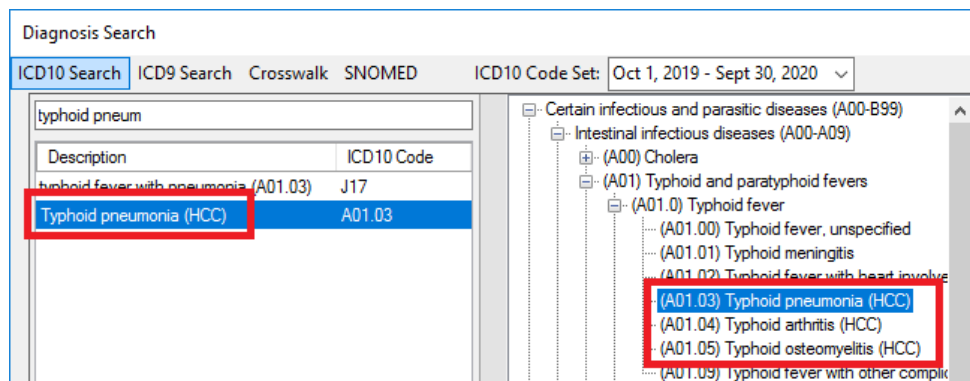


Figure 11 – Diagnosis Search

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