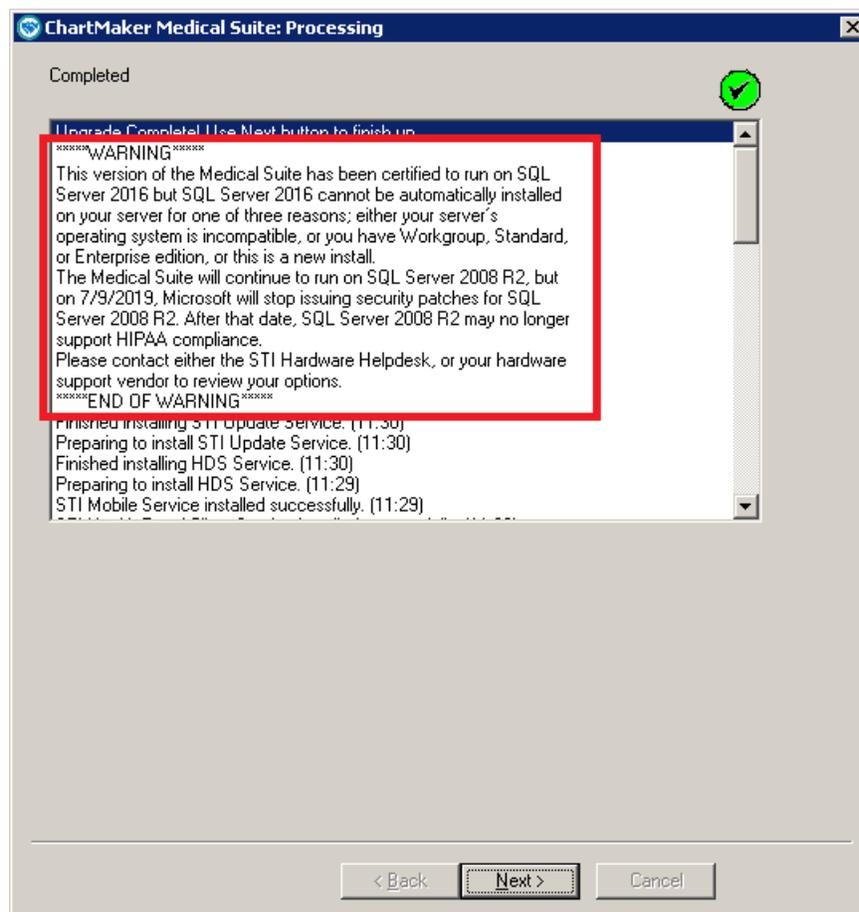# ChartMaker® Clinical Release Notes

ChartMaker® 2018.2 (fv6.4.3)

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

- **Medications – NADEA Number –** The system has been updated so that the various field titles, warnings, and messages that used the NADEAN Number text designation have been replaced with **NADEA Number** to provide more consistency and clarity to those field names, titles, and/or text. See Figures 1 – 3 for examples.

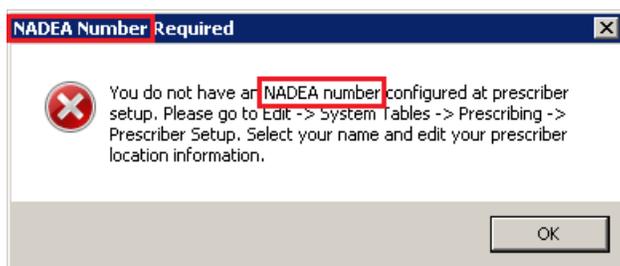**Figure 1 – Edit Prescriber Location**

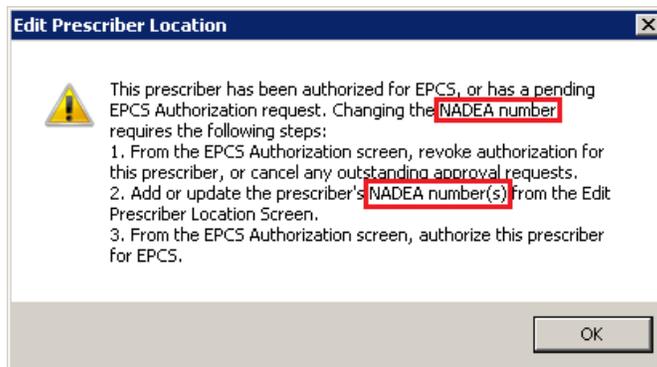**Figure 2 – NADEA Number Required Warning Message**

Figure 3 – Edit Prescriber Location Warning Message

Added Features (continued)

- **Medications – Prescribe Medication – Real Time Prescription Benefits–** The Prescribe Medication screen has been updated with a **Real Time Prescription Benefits** section, directly above the Formulary section, that will provide real time prescription benefit information that allows you to view estimated cost, alternative medication options, pharmacy type options, and other formulary information based on the payer and pharmacy selected for the patient, when available.

  Prior to retrieving the applicable prescription benefits, the medication **Form**, **Quantity**, and **Days Supply**, as well as a **Payer** and **Pharmacy** must be entered or selected, and the Real Time Prescription Benefit grid will keep you apprised of the information that needs to be configured before benefit information can be retrieved. See Figure 4. When the system is querying the prescription benefits, a Pending message will appear in the grid. See Figure 5.

Figure 4 – Prescribe Medication – RTPB – Enter/Select Prescription Information

Figure 5 – Prescribe Medication – RTPB – Pending Message

When the benefit information is retrieved, the system will display up to three (3) pharmacy channels, and up to five (5) alternative medication options within the Real Time Prescription Benefits grid. If benefit information is not available or the Payer does not participate in the Real Time Prescription Benefits workflow, applicable error messages will appear in the Real Time Prescription Benefits grid next to a red X icon. See Figure 6.

Figure 6 – Prescribe Medication – RTPB Unavailable

If a medication is covered without restrictions a green checkmark icon will be displayed beside the estimated cost. See Figure 7.

Figure 7 – Prescribe Medication – RTPB - Covered

Medications – Prescribe Medication – Real Time Prescription Benefits (continued)

If the medication is covered with restrictions, or there are alerts associated with the medication, a yellow exclamation point will appear beside the estimated cost. If the medication requires prior authorization, a purple PA will appear beside the estimated cost. See Figure 8. By clicking in the grid where the alert/restriction icon appears, a pop-up message will appear outlining the restriction and/or outlining the warning or alert. Likewise, if you hover over the icons and any of these icons and items, a tool tip will display.

Figure 8 – Prescribe Medication – RTPB Covered with Restrictions/Prior Auth & Pop-Up Message

Added Features (continued)

Medications – Prescribe Medication – Real Time Prescription Benefits (continued)

Also, there may be instances where the payer processed the request for the medication but was unable to provide alternatives that may be at a lower cost due to time constraints. This is indicated by an informational icon appearing before the medication. See Figure 9.

Figure 9 – Prescribe Medication – RTPB Covered with Restrictions/Prior Auth & Alternatives Not Available

To accommodate the Real Time Prescription Benefits work flow, the Prescribe Medication dialog has also been updated with a **Pharmacy** drop-down, along with a **Manage patient pharmacies** button, allowing you to select and maintain pharmacy options for the patient. See Figure 8 (above). When a patient has a single pharmacy saved in their chart, it will default into the Pharmacy field in the Prescribe Medication dialog. When the patient has multiple pharmacies saved in their chart, the first pharmacy in the drop-down list will default. These pharmacies will default or can be selected regardless what transmission type is selected.

In addition, due to the various new sections and fields in the Prescribe Medication screen, the default supported screen resolution has been updated to 1600 x 900. The Prescribe Medication will open to 1024 x 800 by default, with the ability to reduce the height down to a resolution of 1024 x 718, which will then introduce a scroll bar to navigate all areas of the screen.

Added Features (continued)

- **Medications – Confirm Prescription – Real Time Prescription Benefits–** The Confirm Prescription screen has been updated with a **Real Time Prescription Benefits** section, below the Medication section, that will provide real time prescription benefit information that allows you to view estimated cost, alternative medication options, pharmacy type options, and other formulary information based on the payer and pharmacy selected for the patient, when available. See Figure 10. The Real Time Prescription Benefit section will display the benefit response that was displayed in the Prescribe Medication dialog. Likewise, Pharmacy field will also default the pharmacy selected from the Prescribe Medication screen. If you change the pharmacy, a new request will be sent, and the Real Time Prescription Benefits grid will display the new benefit information for that pharmacy. The information displayed will be similar to how it appears in the Prescribe Medication dialog.

In addition, due to the new section and fields in the Confirm Prescription screen, the default supported screen resolution has been updated to 1600 x 900. The Confirm Prescription screen will open to 1024 x 850 by default, with the ability to reduce the height down to a resolution of 1024 x 718, which will then introduce a scroll bar to navigate all areas of the screen.

Figure 10 – Confirm Prescription – Real Time Prescription Benefits

Added Features (continued)

- **Medications – Prescribe Medication – PDMP –** The system has been updated so that when prescribing or renewing a medication, and the PDMP report has been queried and/or viewed, the note output or auto-generated drug log will contain this information to provide an easy visual indicator in the chart. Whenever the **PDMP queried** option is checked in the Prescribe Medication dialog, the note output or auto-generated drug log will contain **PDMP: queried**. If the report was accessed as well, by clicking the PDMP Report button, the note output or auto-generated drug log will contain **PDMP: queried, report viewed**. See Figure 11 and 12 for examples.

Figure 11 – Note – Medication – PDMP

Figure 12 – Auto-Generated Drug Log – PDMP

- **Medications – Process Refill Request – PDMP –** The system has been updated so that when processing a refill request, and the PDMP report has been queried and/or viewed, the auto-generated drug log will contain this information to provide an easy visual indicator in the chart. Whenever the **PDMP queried** option is checked in the Refill Response dialog, the note output or auto-generated drug log will contain **PDMP: queried**. If the report was accessed as well, by clicking the PDMP Report button, the note output or auto-generated drug log will contain **PDMP: queried, report viewed**. See Figure 13.

Figure 13 – Refill – Auto-Generated Drug Log – PDMP

Added Features (continued)

- **The Note Tab –Order Procedure –** The Order Procedure dialog has been updated with an Appropriate Use Criteria section whenever an image procedure is selected. See Figure 14. Do note, the **Type** field, in the **Condition Properties** dialog (**System Tables** > **Conditions** > **Procedures**), needs to be set to **Image** for the system to recognize the procedure as an image procedure, and for the Appropriate Use Criteria section to appear.

  Under the Appropriate Use Criteria program, at the time a practitioner orders an advanced diagnostic imaging service for a Medicare beneficiary, he/she, or clinical staff acting under his/her direction, will be required to consult a qualified Clinical Decision Support Mechanism (CDSM). CDSMs are electronic portals through which appropriate use criteria (AUC) is accessed. The CDSM provides a determination of whether the order adheres to AUC, or if the AUC consulted was not applicable (e.g., no AUC is available to address the patient's clinical condition). For more information about the Appropriate Use Criteria Program see: https://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/Appropriate-Use-Criteria-Program/index.

  Three open access qualified CDSMs that have free tools available are: AIM Specialty Health ProviderPortal®, National Decision Support Company CareSelect™, and Test Appropriate CDSM. Do note, you will need to register with the qualified CDSM you choose and will need to log into it each time you use it. For a complete list of qualified CDSMs see: https://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/Appropriate-Use-Criteria-Program/CDSM.

  The Appropriate Use Criteria section will be disabled if there is not an AUC URL configured in the Procedures preferences (see the Preferences – Procedure entry below for details). If an AUC URL is configured, then the Appropriate Use Criteria section will be active, allowing you to access the CDSM, that was configured in the AUC URL field in the procedure preferences, via the CDSM Website button, obtain and copy the consultation information, and then paste that information using the Paste from Results button into the AUC Consultation Results field.
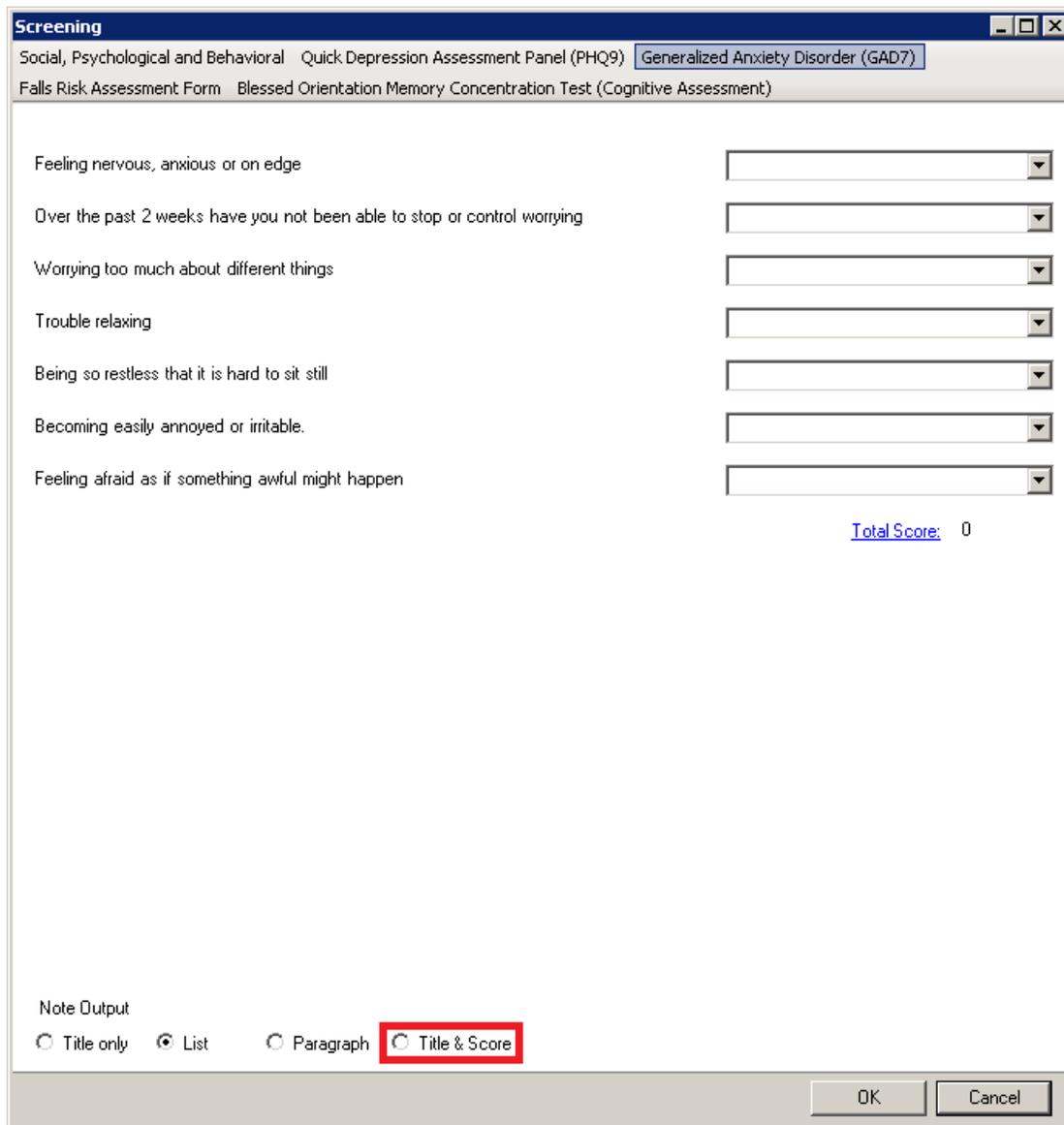
  When information is entered in the AUC Consultation Results field, it will be outputted to the chart note with **AUC:** followed by whatever text appears in the field. Likewise, it will be included in an AUC Consultation Results section when printing the order from the facesheet.

Figure 14 – Order Procedure

Added Features (continued)

- **The Note Tab – Screening –** The Note Output section, in the Screening dialog, has been updated with a **Title & Score** option. See Figure 15. Whenever that option is selected for a screening, the note output will contain the title of the screening, as well any scores that were calculated within that screening.

Figure 15 – Screening

- **The Note Tab – Signature –** The system has been updated so that when signing a note, the provider's signature will be prefixed with **Electronically signed by:** and will then contain the provider's signature. See Figure 16. Do note that this change pertains to the free-text signature and not the Topaz signature. Also note, that if the Signature preference already contains similar text that precedes the provider's name, this text must be removed from the signature preference so that there will not be any redundant text.

Figure 16 – Signed Chart Note – Signature

Added Features (continued)

- **Preferences — Note Details –** The Screening Note Output section of the Note Details tab, in the Preferences dialog, has been updated with a **Title & Score** option, allowing you to select that option to default for each screening whenever a screening widget is opened in a new chart note for a patient. See Figure 17.
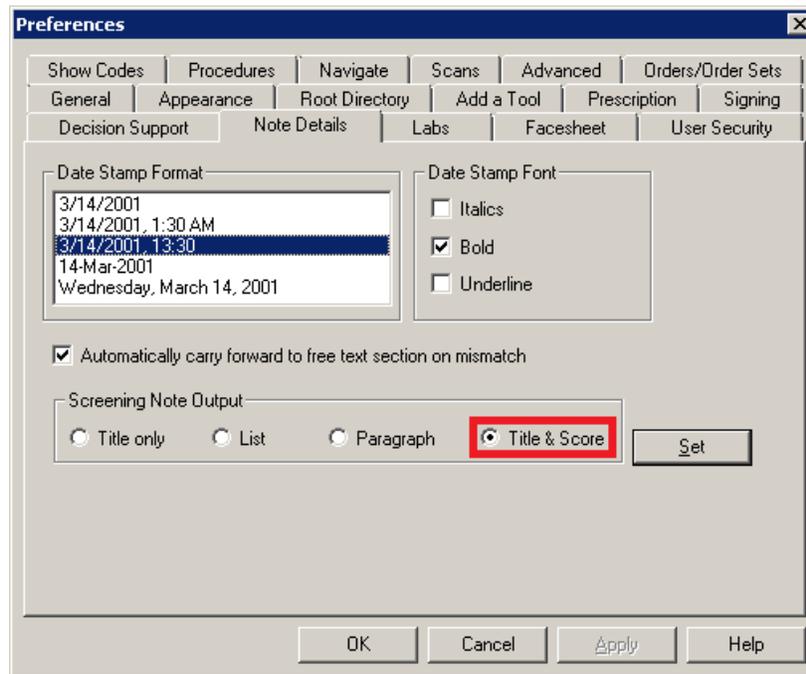

Figure 17 – Preferences – Note Details – Screening Note Output

Added Features (continued)

- **Preferences — Procedures –** The Proc Date Format tab in the Preferences dialog has been renamed **Procedures**. Additionally, the Procedures tab has been updated with an **AUC URL** field and a **CDSM Name** field, that allows you to configure the URL and name of a qualified Clinical Decision Support Mechanism (CDSM) you will be utilizing when ordering imaging procedures. See Figure 18.

  Under the Appropriate Use Criteria program, at the time a practitioner orders an advanced diagnostic imaging service for a Medicare beneficiary, he/she, or clinical staff acting under his/her direction, will be required to consult a qualified Clinical Decision Support Mechanism (CDSM). CDSMs are electronic portals through which appropriate use criteria (AUC) is accessed. The CDSM provides a determination of whether the order adheres to AUC, or if the AUC consulted was not applicable (e.g., no AUC is available to address the patient's clinical condition). For more information about the Appropriate Use Criteria Program see: https://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/Appropriate-Use-Criteria-Program/index.

  Three open access qualified CDSMs that have free tools available are: AIM Specialty Health ProviderPortal®, National Decision Support Company CareSelect™, and Test Appropriate CDSM. Do note, you will need to register with the qualified CDSM you choose and will need to log into it each time you use it. For a complete list of qualified CDSMs see: https://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/Appropriate-Use-Criteria-Program/CDSM.

  After the AUC URL has been entered, you can click the **Test URL** button, which will launch your web browser to the URL entered in this field. Do note, both the AUC URL and CDSM Name fields need to be entered if the AUC preference is going to be used. A warning message will appear if only one of these fields contains information and you will not be able set those preferences until both fields are entered.
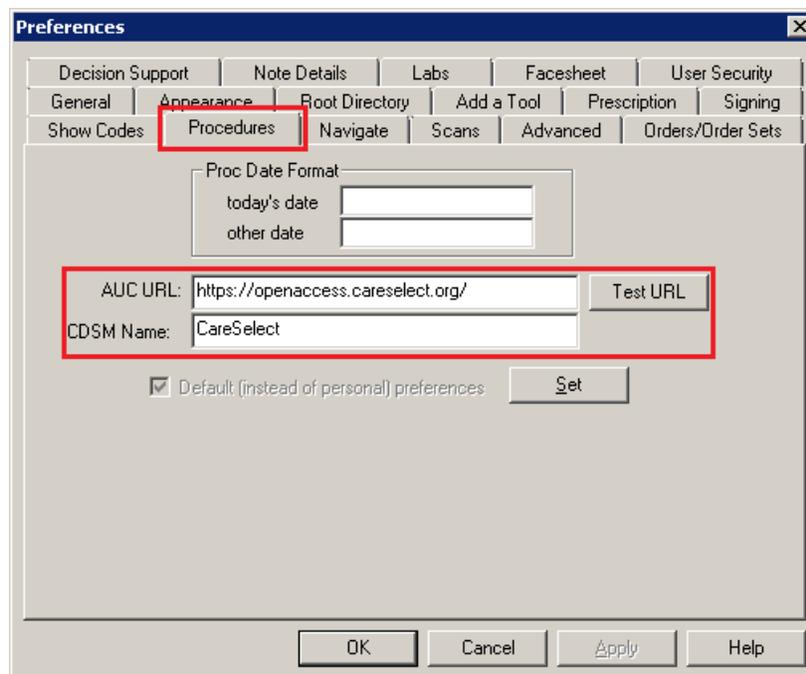

Figure 18 – Preferences – Procedures – Appropriate Use Criteria

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