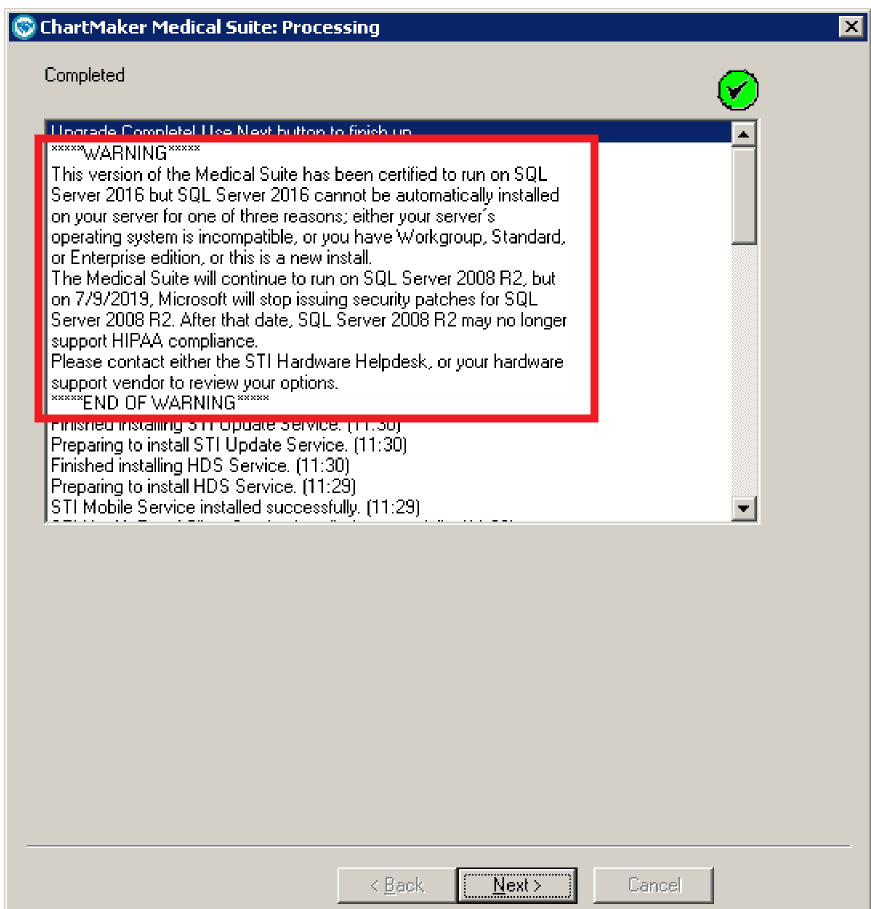
ChartMaker® Clinical Release Notes

ChartMaker® 2018.2 (fv6.4.5)

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 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 – Specialty Patient Enrollment –** The ChartMaker Medical Suite has been updated with a Specialty Patient Enrollment functionality so that when a specialty medication is selected in the Prescribe Medication screen, the system will then lock in the **Specialty Patient Enrollment** process that automates the specialty prescription initiation and renewal process, allowing you to electronically send enrollment forms to specialty pharmacies for the specialty drug. Once the specialty medication has been confirmed and sent, via the Confirm Prescription screen, a Specialty Enrollment Request is automatically sent to the specialty pharmacy. No action is needed by users to send this request. This automated task prepopulates the specialty medication enrollment form with information from the patient's chart and routes the form electronically to the appropriate specialty pharmacy. If the specialty pharmacy does not request additional information, or any additional medication services acknowledgement, no other clinical staff involvement is needed. For further details on how this functionality works in the system see the various entries below that are tagged, "Specialty Patient Enrollment," in the enhancement heading.

- **Chart – Specialty Patient Enrollment** – The Chart menu has been updated with a **Specialty Patient Enrollment** option that allows you to access the SPO Status dialog to provide further information for the Specialty Patient Enrollment process regarding specialty medications. See Figure 1. This option is available via the Chart menu when you are in a patient's chart, or if you are not in a patient's chart. To access this **Specialty Patient Enrollment** option, you must have a **Specialty Patient Enrollment** privilege of **Submitter** or **Viewer**, as well as a **Prescribing** privilege of **Proxy** or **Prescriber**. If you do not have these privileges, the menu item will be grayed out and not accessible. For further information on the SPO Status dialog and configuring information therein, see the Facesheet – Medication List – SPO Action Required entry below.

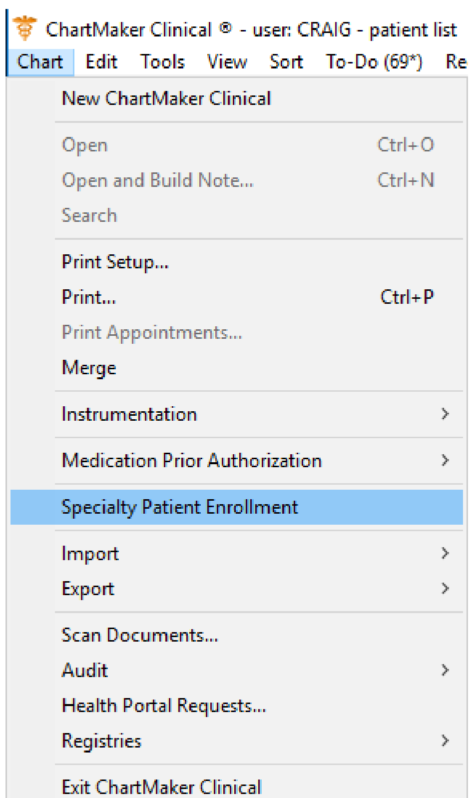


Figure 1 – Chart > Specialty Patient Enrollment

Added Features (continued)

- **Direct Messaging – Direct Message Import –** The **Import CDA** section, of the **Direct Message Import** dialog, has been updated with an **Import Standards Panel (HITSP) CCD/C32** option and a **Do not import CDA** option. See Figure 2. The **Import Standards Panel (HITSP) CCD/C32** option offers you the ability to open and import files when the first import option is unable to, and also produces an error due to the file being in an older C32 format or an invalid CDA file; while the **Do not import CDA** option allows you to import the direct message details without the attached CDA.

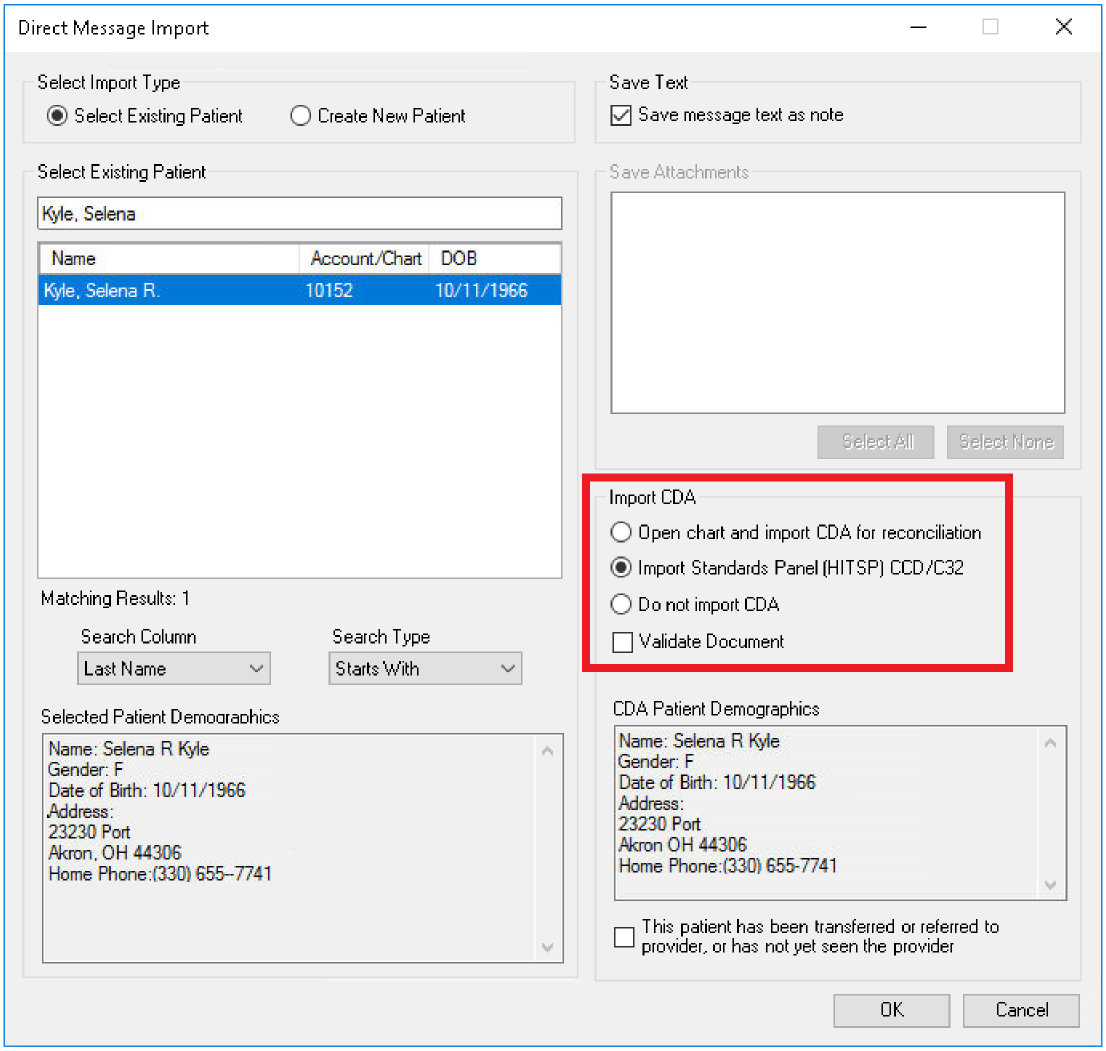


Figure 2 – Direct Message Import

Added Features (continued)

- **Facesheet – Medication List – Specialty Patient Enrollment – SPO Action Required –** The Facesheet has been updated so that whenever a specialty medication requires further action from a pharmacy, that medication will be prefixed with a **[SPO ACTION REQUIRED]** indicator and will be highlighted orange. See Figure 3. If you click on the corresponding ***** button, or right-click the medication, the medication menu has been updated to include an **Open SPO Status dialog** option that allows you to access the **SPO Status – Worklist** to access those patients that require further information or acknowledgement for the Specialty Patient Enrollment process. To access this **Open SPO Status dialog** option, you must have a **Specialty Patient Enrollment** privilege of **Submitter** or **Viewer**, as well as a **Prescribing** privilege of **Proxy** or **Prescriber**. If you do not have these privileges, the menu item will be grayed out and not accessible. Do note, that you can also access the SPO Status dialog at any time by clicking **Chart** > **Specialty Patient Enrollment**, which also requires those privileges to access.

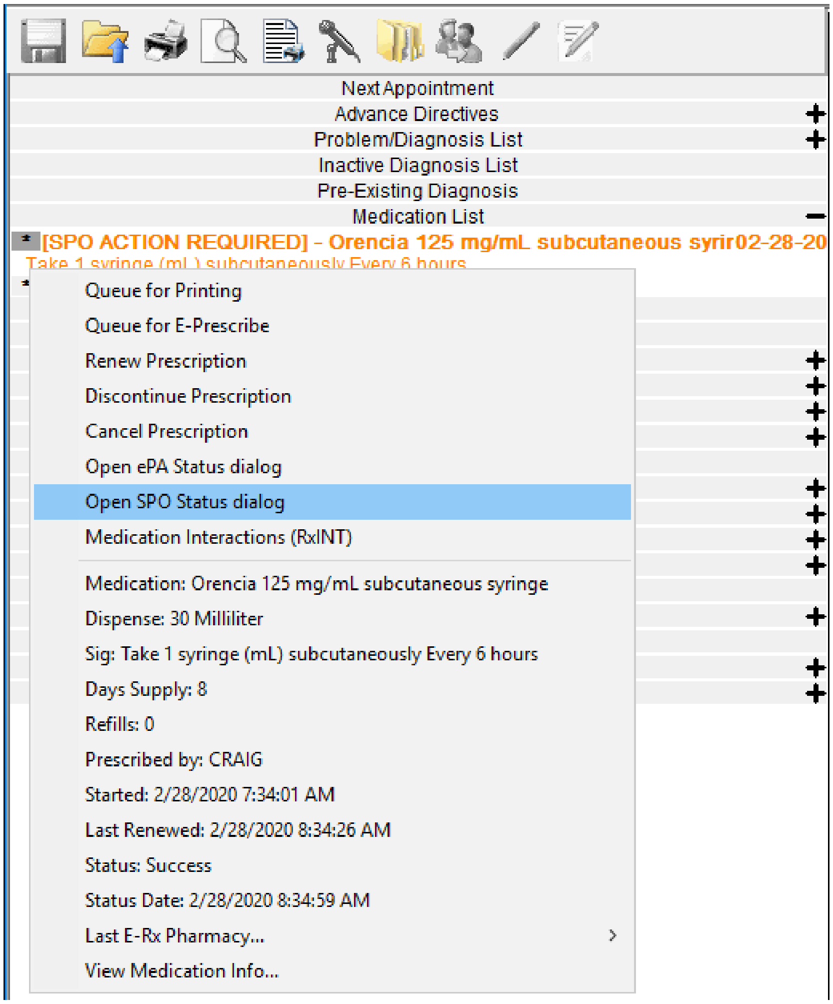
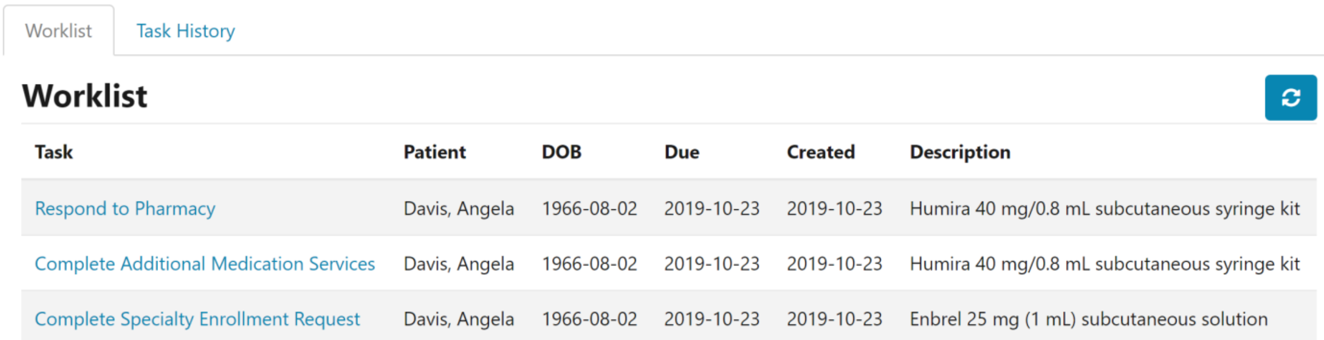


Figure 3 – Facesheet – Medication List

Added Features (continued)

Facesheet – Medication List – Specialty Patient Enrollment – SPO Action Required (continued)

When accessing the **SPO Status** dialog, you are connected to Surescripts® interface that allows you to view the **Worklist**, and **Task History**, for the provider. This allows you to provide any additional details, or acknowledgements, that the pharmacy requires to complete the specialty enrollment. Upon first entering the SPO Status dialog, the Worklist will display any outstanding requests for all patients. See Figure 4. Depending upon the volume of requests, you may need to scroll or use the Filter options to locate the specific request you want to process.



Task	Patient	DOB	Due	Created	Description
Respond to Pharmacy	Davis, Angela	1966-08-02	2019-10-23	2019-10-23	Humira 40 mg/0.8 mL subcutaneous syringe kit
Complete Additional Medication Services	Davis, Angela	1966-08-02	2019-10-23	2019-10-23	Humira 40 mg/0.8 mL subcutaneous syringe kit
Complete Specialty Enrollment Request	Davis, Angela	1966-08-02	2019-10-23	2019-10-23	Enbrel 25 mg (1 mL) subcutaneous solution

Figure 4 – SPO Status – Work List

There will typically be two types of tasks in the worklist: **Additional Medication Services** and **Respond to Pharmacy**. The former requiring you to acknowledge or attest that patient consent was obtained, and the latter requiring additional information from the pharmacy. Once the applicable patient and request has been located, double click that request. Figures 5 and 6 provide examples of these types of tasks. Do note, that all the fields and questions that have a red asterisk are required and you will not be able to proceed until the required fields contain the applicable information.

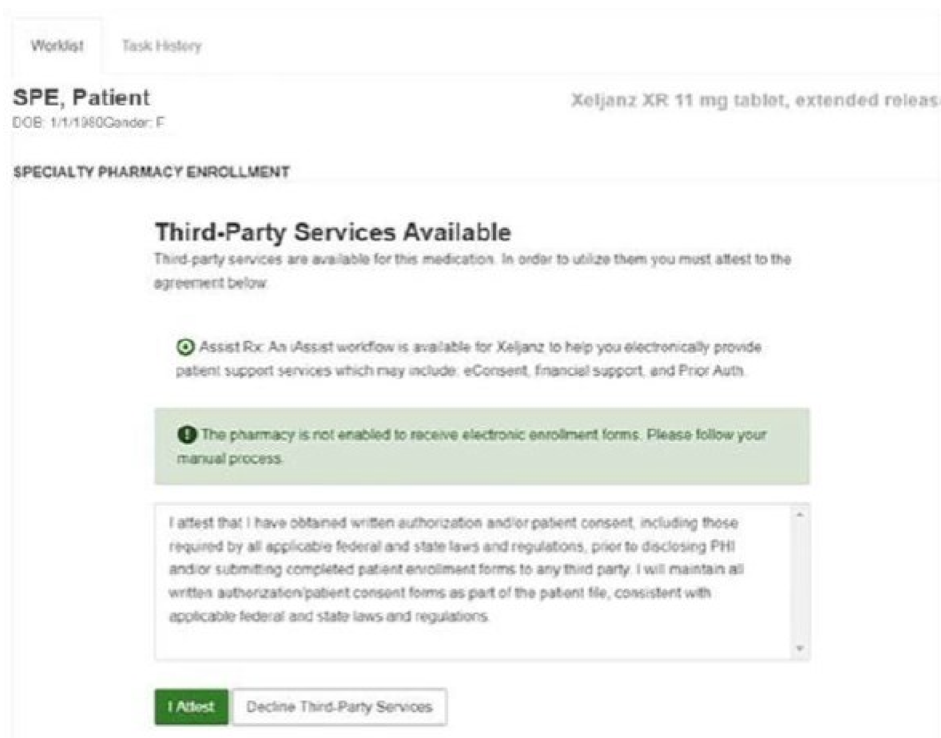


Figure 5 – SPO Status – Additional Medication Services

Added Features (continued)

Facesheet – Medication List – Specialty Patient Enrollment – SPO Action Required (continued)

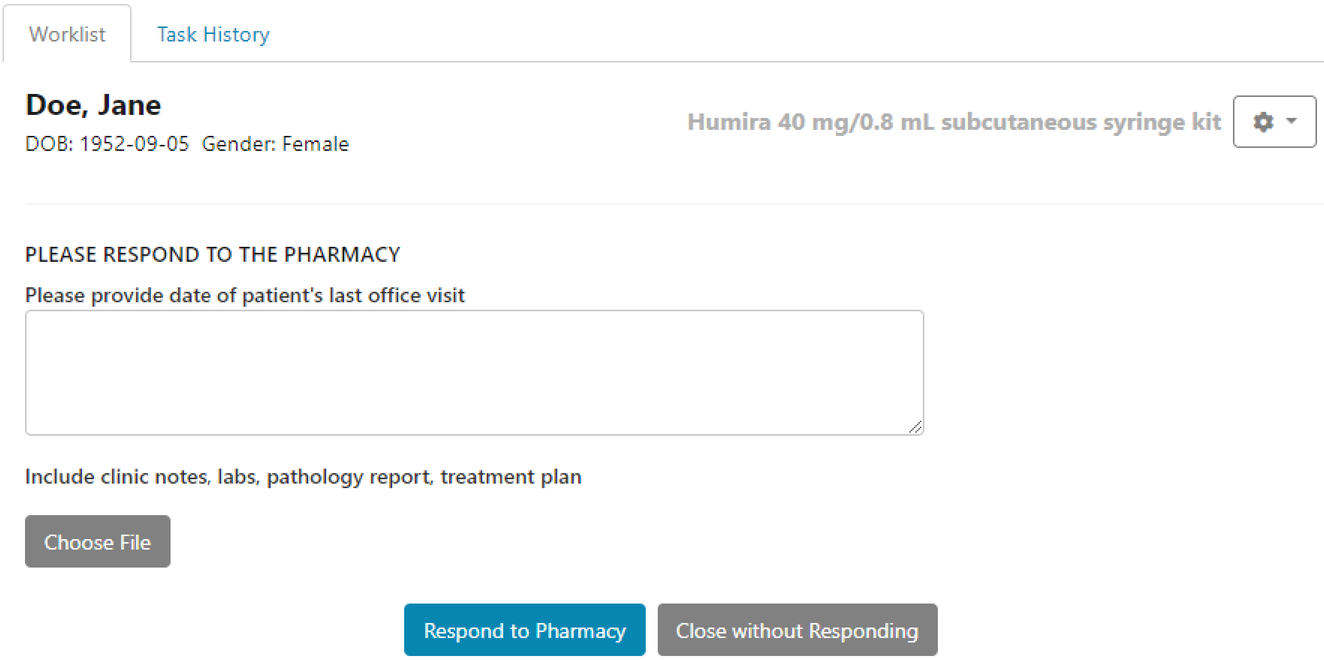


Figure 6 – SPO Status – Respond to Pharmacy

After all the required information has been entered on the various pages, a summary page will appear that contains all the information that will be sent to the pharmacy. You can click the **I Attest**, **Respond to Pharmacy**, or **Submit to Pharmacy** button to complete process and you will return to the original Worklist, and that request item will be removed from the Worklist and moved to the Task History area. You can either close out of the SPO Status dialog or process another request.

After closing out the SPO Status dialog, the [SPO ACTION REQUIRED] indicator will be removed from the specialty medication in the facesheet, and it will return to the normal black color.

Added Features (continued)

- **Import Patient Data –** The system has been updated so when importing a CDA file via the Import Document dialog, the chart note that contains the document import will now include a **Procedure** checklist that allows you to update the patient's chart with any procedures that were contained in the document import. See Figure 7.

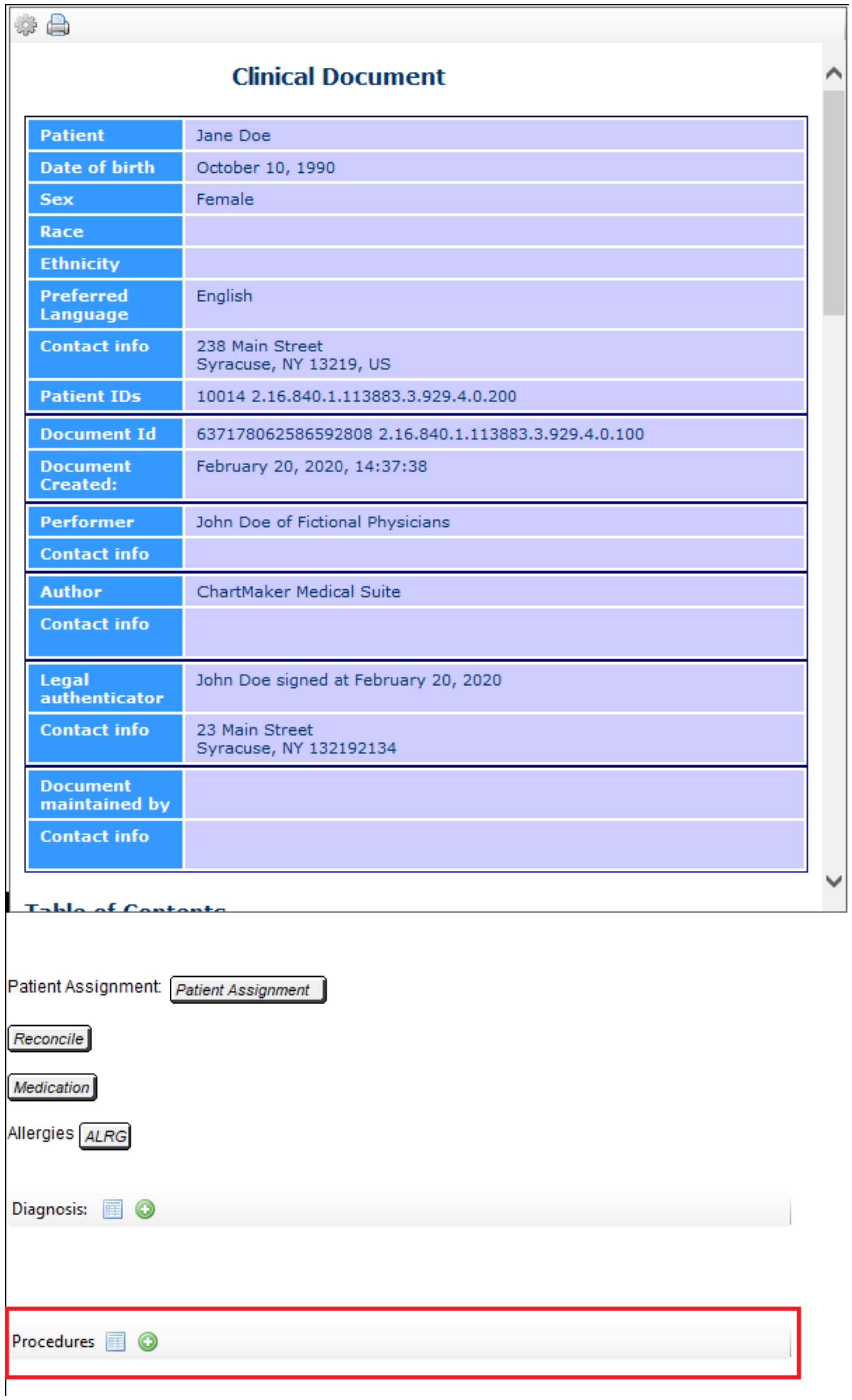


Figure 7 – Chart Note – Document Import

Added Features (continued)

- **Medications – Prescribe Medication – Real Time Patient Savings–** The Prescribe Medication screen has been updated with a **Real Time Patient Savings** section, between the Real Time Prescription Benefits section and the Formulary section, that will provide information on copay assistance programs which may be available for the medication being prescribed. This information will supplement the Real Time Prescription Benefit and Formulary information, allowing the prescriber to select the prescription best for the patient by considering all clinical and financial information available.

  Prior to displaying any applicable patient savings in the Real Time Patient Savings section, the medication Form, Quantity, and Days Supply, as well as a Payer and Pharmacy must be entered or selected, so that the **Real Time Prescription Benefits** can populate. See Figure 8. When the system is querying the patient savings, a Pending message will appear in the grid.

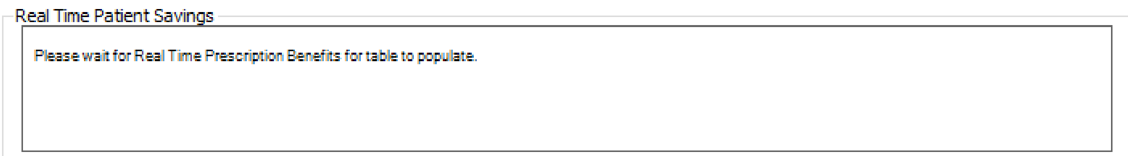


Figure 8 – Prescribe Medication – RTPS – Please wait for RTPB for table to populate

  When the patient saving information is retrieved and available for the medication, the system will display the **Original** cost (based on the prescription benefit information in the RTPB section), the **Offer** (the RTPS amount), and a **Patient Pays** amount (the Original minus the Offer amount). See Figure 9. In addition, the Real Time Patient Section may contain additional text and links that provide further information regarding the patient savings.

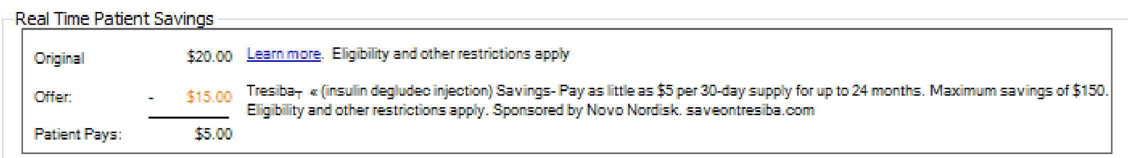


Figure 9 – Prescribe Medication – RTPS Available

  When the information is retrieved and there are no patient savings available for the medication, the system will display a yellow warning icon and the text, "No offer was found for the request." See Figure 10. Likewise, in the chance that there was an error during the retrieval, the system will display a red icon and the error message will be displayed.

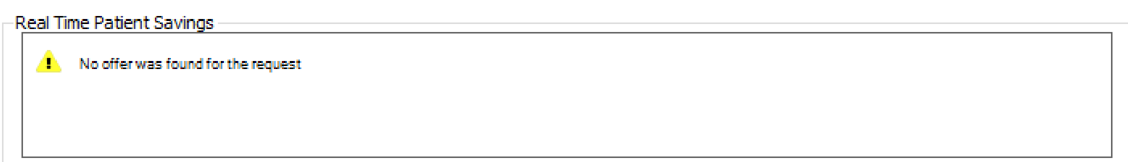


Figure 10 – Prescribe Medication – RTPS Unavailable

Medications – Prescribe Medication – Real Time Patient Savings (continued)

To accommodate the Real Time Patient Savings section, the Prescribe Medication dialog has been updated and redesigned. See Figure 11.

The **Inactive Meds** (now), **Medication Info** (now), **Medication Eligibility** (now) and **Medication History** (now) buttons along the top have been replaced with icons, and if you hover over these icons a tool tip will appear with the applicable text for the button. Likewise, the **Dose Calculator** (now), **Edit** (now), and **Manage patient pharmacies** (now) buttons have been replaced with icons.

The **Medication History Consent** button has been replaced with the text **Rx History Consent** and a corresponding link with the current consent selected for the patient. Simply click that link to access the Consent dialog for the patient if you need to change their consent settings.

All the check box options (**Sample**, **PDMP Queried**, **Administered during visit**, **Initial order create outside of Clinical**, and **Print patient prescription savings materials**) have been moved to the lower left. While **Lot #** and **Expiration Date** fields have been moved adjacent to the corresponding Sample box, and the **PDMP Report** button has been replaced with a link by the PDMP Queried box.

In addition, the **SIG** and **Pharmacy** fields have been shifted to the right and aligned underneath the Transmission and Diagnosis fields. And lastly, the **Override?** button, for ePA, has been replaced with a link.

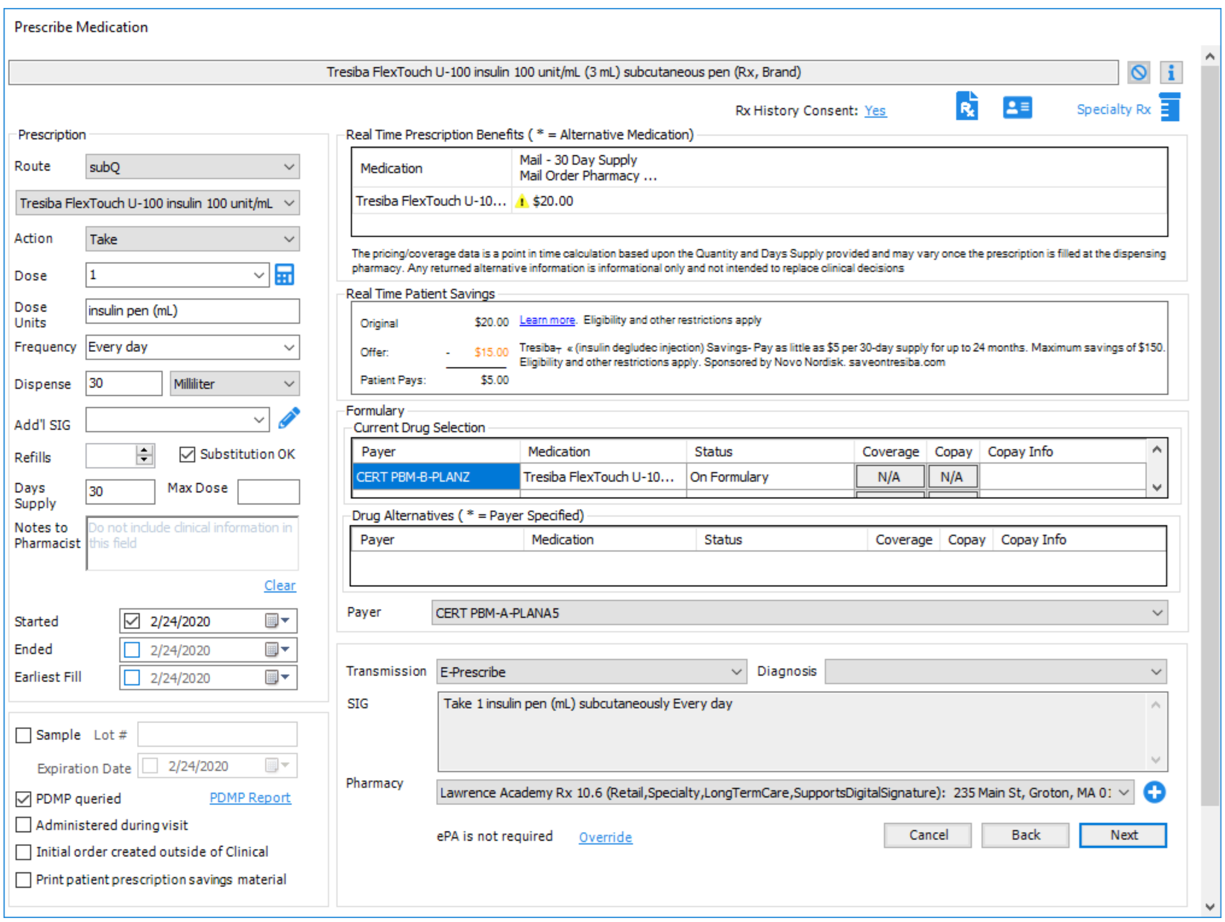


Figure 11 – Prescribe Medication

Added Features (continued)

- **Medications – Prescribe Medication – Specialty Patient Enrollment –** The Prescribe Medication screen has been updated with a **Specialty Rx** button that will appear blue when prescribing non-specialty medications (see Figure 11 above), but will turn purple whenever a specialty medication is being prescribed that requires additional enrollment information (additional diagnosis, medication, allergy, weight, etc.) to be sent along with the prescription information. See Figure 12. You can click the Specialty Rx button for non-specialty medications to manually enable the **Specialty Patient Enrollment** process.

  When a specialty medication is prescribed, the system will then lock in the **Specialty Patient Enrollment** process that automates the specialty prescription initiation and renewal process, allowing you to electronically send enrollment forms to specialty pharmacies for the specialty drug. Once the specialty medication has been confirmed and sent, via the Confirm Prescription screen, a Specialty Enrollment Request is automatically sent to the specialty pharmacy. No action is needed by users to send this request. This automated task prepopulates the specialty medication enrollment form with information from the patient's chart and routes the form electronically to the appropriate specialty pharmacy. If the specialty pharmacy does not request additional information, or any additional medication services acknowledgement, no other clinical staff involvement is needed.

  If the pharmacy requires additional information or acknowledgement for enrollment, then the system will return a To-Do List message with a subject heading of **Specialty Medication Enrollment Action Required** indicating that you need to complete the enrollment process for the patient. You will then need to access the **SPO Status Worklist**, either via **Chart** > **Special Patient Enrollment**, or via the patient's facesheet, to complete the information regarding the specialty enrollment. See the Facesheet – Medication List – SPO Action Required entry above, and the To-Do List – Specialty Medication Enrollment entry below, for further information.

  Also note, if the **Pharmacy** selected is not updated for electronic specialty enrollment, or if there is another issue with sending the Specialty Patient Enrollment, then the system will return a To-Do List message with a subject heading of **Specialty Medication Enrollment Request Error** indicating that the specialty enrollment process failed, and that you will need to follow-up manually with the pharmacy to complete the enrollment process.

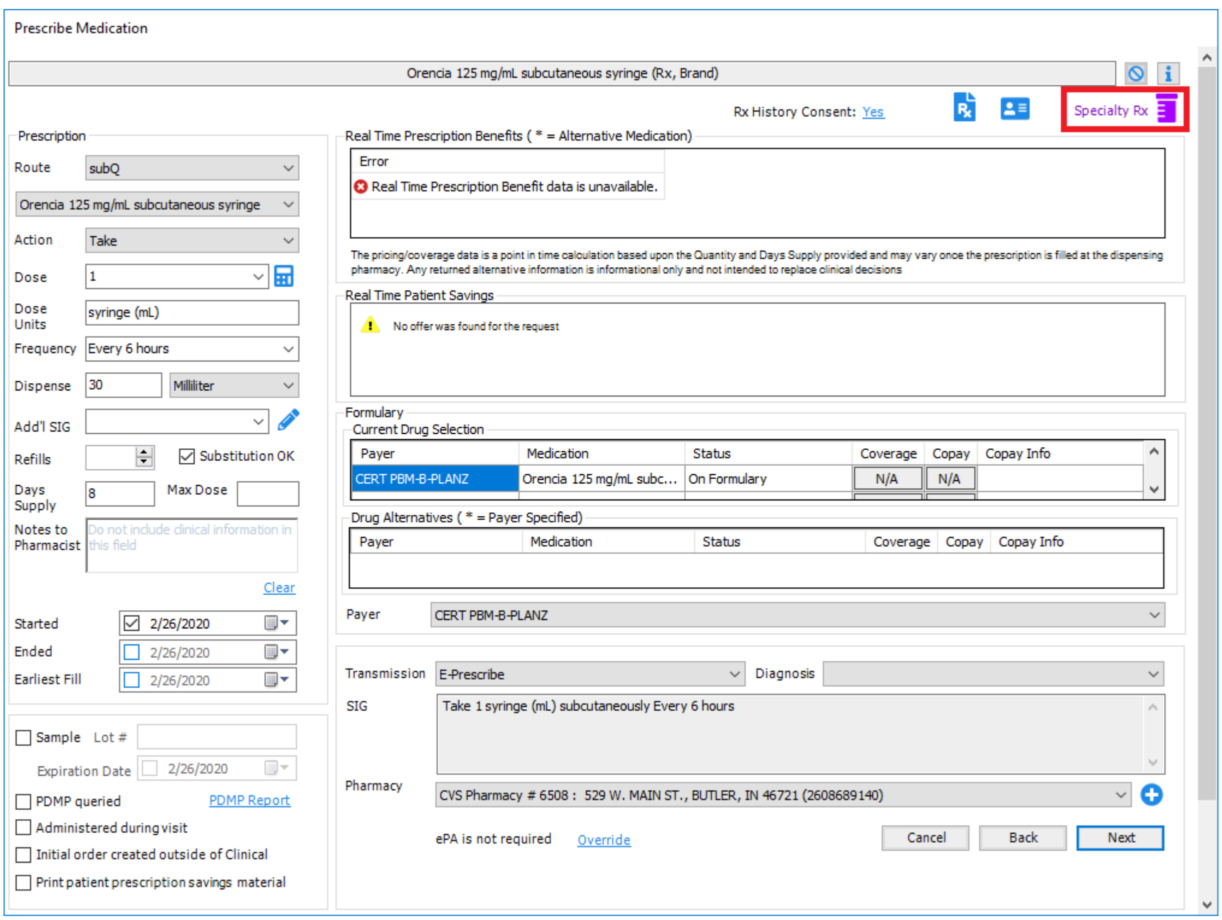


Figure 12 – Prescribe Medication – Specialty Rx (Active)

Added Features (continued)

- **Medications – Confirm Prescription – Real Time Patient Savings–** The Confirm Prescription screen has been updated with a **Real Time Patient Savings** section, below the Real Time Patient Benefits section, that will provide information on copay assistance programs which may be available for the medication being prescribed. This information will supplement the Real Time Prescription Benefit information, allowing the prescriber to select the prescription best for the patient by considering all clinical and financial information available. See Figure 13. The Real Time Patient Savings section will display the benefit response that was displayed in the Prescribe Medication dialog. Likewise, the Pharmacy field will also default the pharmacy selected from the Prescribe Medication screen. If you change the pharmacy, a new request will be sent, causing the Real Time Prescription Benefits grid will display the new benefit information for that pharmacy, which may then change the Real Time Patient Savings information. The patient savings information displayed similar to how it appears in the Prescribe Medication dialog. After the prescription has been confirmed and sent, any Real Time Patient Savings messages and/or coupon URLs that appeared in the corresponding field in the Confirm Prescription screen will be sent to the patient's PatientPortal, and will appear as a new Prescription Savings message (**Messages** > **Prescription Savings**).

  In addition, the icons for each of the sections have been updated, and the **Medication Info** (now) button has been replaced with an icon, and if you hover over this icon a tool tip will appear with the applicable text for the button.

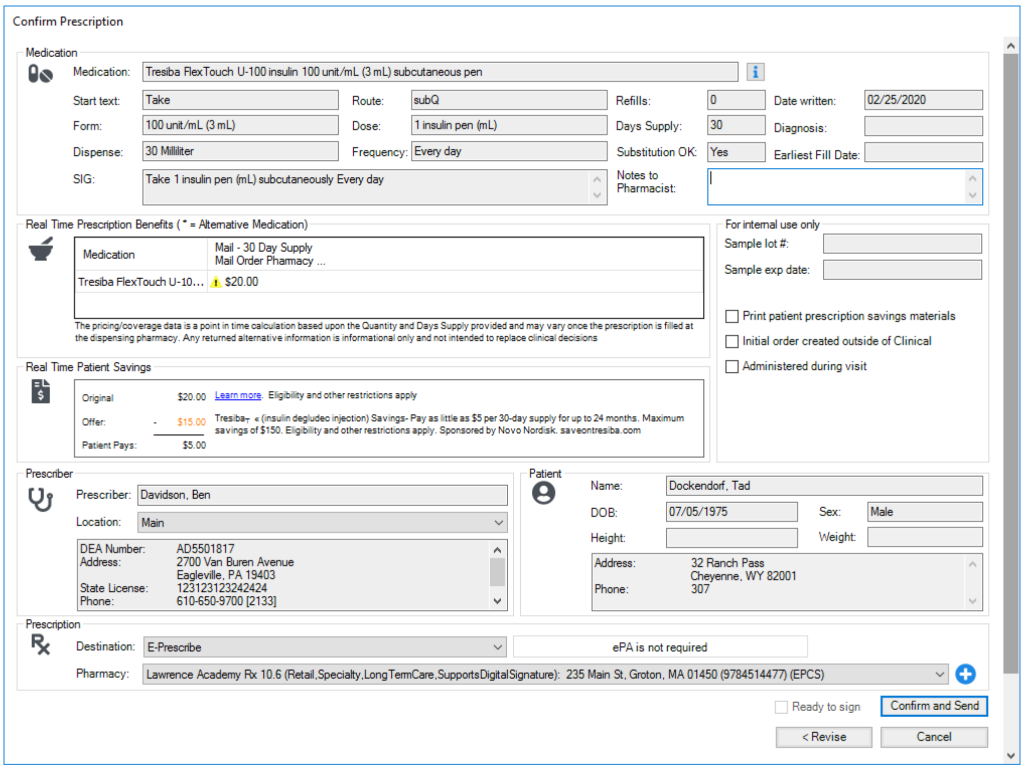


Figure 13 – Confirm Prescription – Real Time Prescription Benefits

- **Medications – Confirm Prescription – Specialty Patient Enrollment –** The Prescription section, of the Confirm Prescription screen, has been updated so that whenever a specialty medication is being confirmed, a **Specialty Rx** icon will appear in the left hand side of the Prescription section to further alert you that that medication will be locked into the Specialty Patient Enrollment process. See Figure 14.

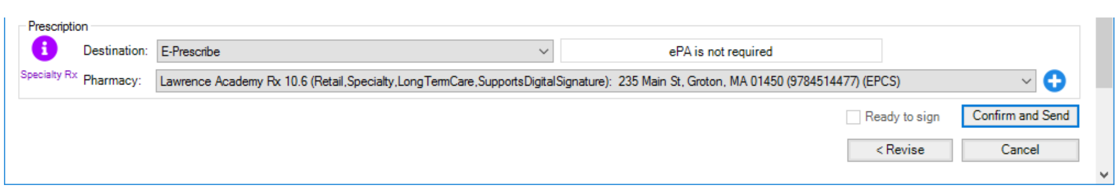


Figure 14 – Confirm Prescription – Real Time Prescription Benefits

Added Features (continued)

- **The Note Tab – Diagnosis* –** The ICD10 Search and Crosswalk areas of the Diagnosis Search dialog have been updated with a **Codes for emergency use (U07)** branch that contains the new **COVID-19** (**U07.1**) diagnosis code, that became effective on April 01, 2020 per CDC guidelines, allowing you to select this code when applicable. See Figure 15.

- **System Tables – Diagnosis Search* –** The ICD10 Search and Crosswalk areas of the Diagnosis Search dialog have been updated with a **Codes for emergency use (U07)** branch that contains the new **COVID-19** (**U07.1**) diagnosis code, that became effective on April 01, 2020 per CDC guidelines, allowing you to select this code when applicable. See Figure 15.

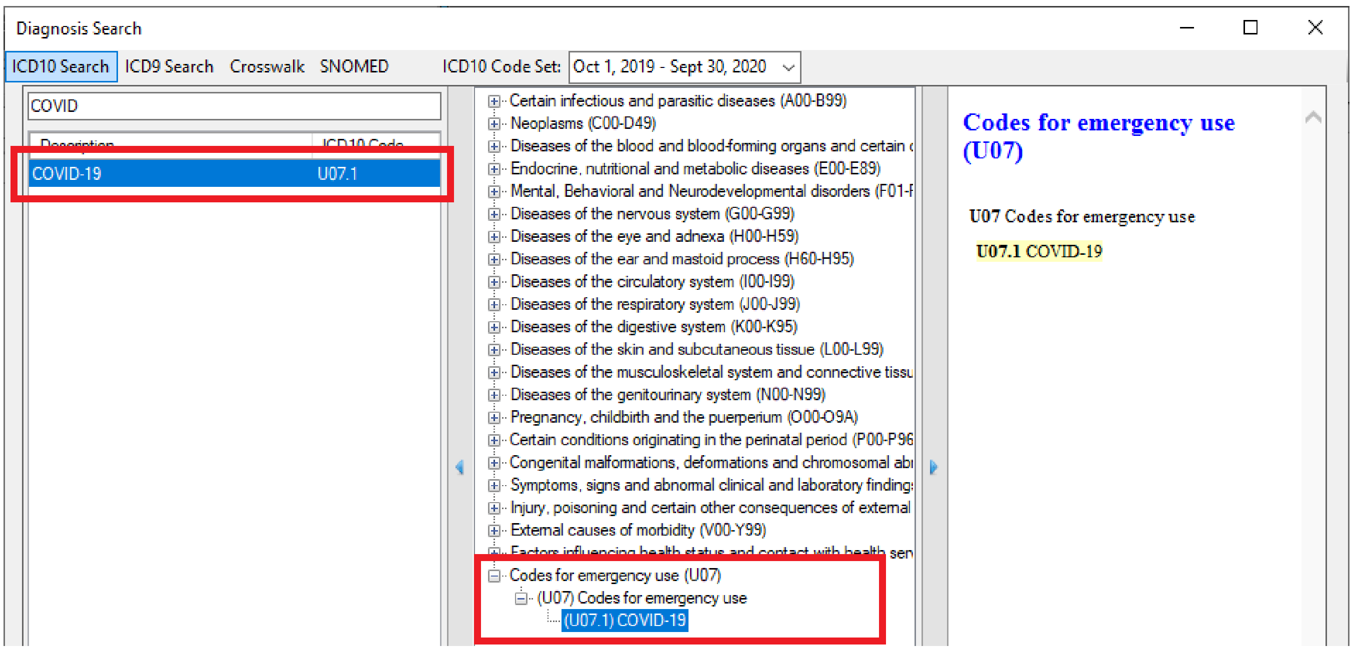


Figure 14 – Diagnosis Search

* This feature was released in the CMMS 6.4.5.387 hot fix release.

Added Features (continued)

- **System Tables – Users – Privileges –** The system has been updated with a new **Specialty Patient Enrollment** privilege that allows you to determine the level of access that users have regarding the viewing and submitting information via the SPO Status dialog when additional information or attestation is needed for the specialty medication enrollment. See Figure 16. The **Submitter** privilege allows you full access to view, answer questions, and provide enrollment information as needed; the **Viewer** privilege allows you to view responses in a read-only format; and the **None** privilege disables access to the SPO Status dialog.

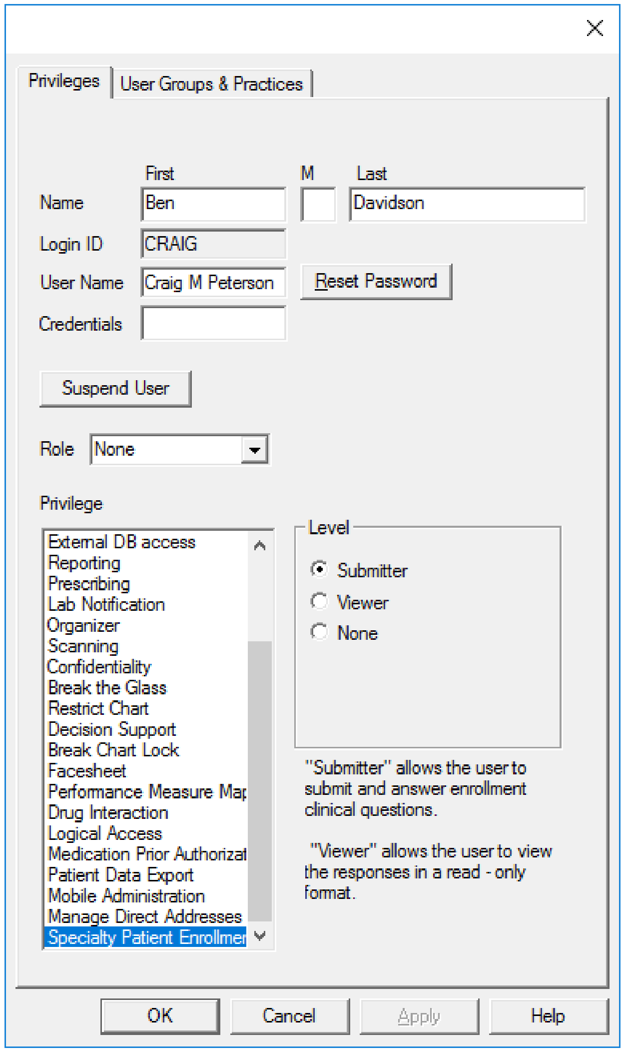


Figure 16 – System Tables – User – Specialty Patient Enrollment Privilege

Added Features (continued)

- **To-Do List – Specialty Patient Enrollment –** The system has been updated to send **Specialty Medication Enrollment** type messages to the user's To-Do List whenever additional action is needed to complete the specialty medication enrollment; or when an error was generated, and the enrollment process failed.

  When additional action is required, the message will have a **Specialty Medication Enrollment Action Required** subject heading, and the message will indicate further action is needed to complete the Specialty Enrollment process for the patient and medication listed. See Figure 17. When you double-click the message the applicable patient's chart will open allowing you to access then SPO Status dialog via the corresponding medication in the patient's facesheet. See the Facesheet – Medication List – Specialty Patient Enrollment – SPO Action Required entry above for further details.

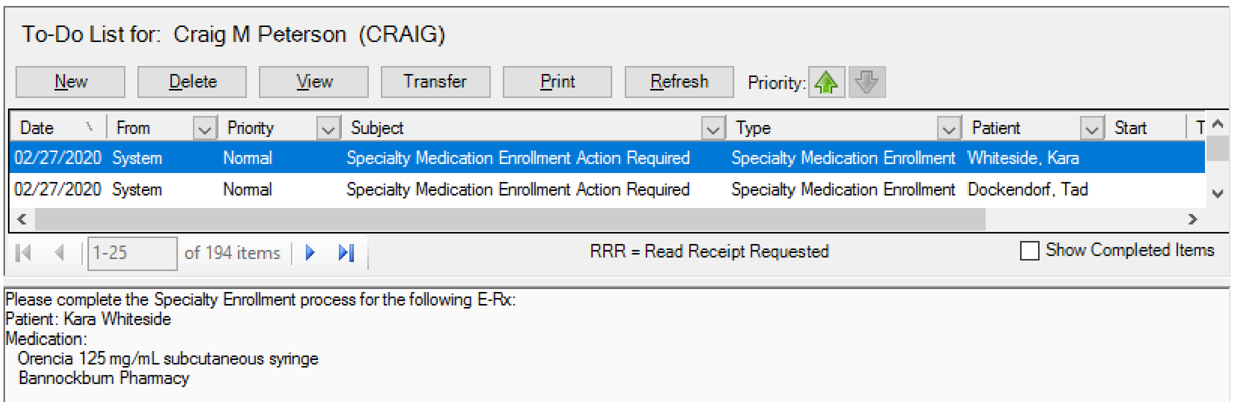


Figure 17 – To-Do List – Specialty Medication Enrollment Action Required

  When a error was generated for the specialty enrollment submission, typically due to a pharmacy that is not updated to accept electronic specialty enrollment, the message will have a **Specialty Medication Enrollment Request Error** subject heading, and the message will indicate that the Specialty Enrollment request failed and you will need to follow up with the pharmacy manually to continue the enrollment process for the patient and medication listed. See Figure 18. When you double-click the message the applicable patient's chart will open allowing you to view the information about the prescribed medication.

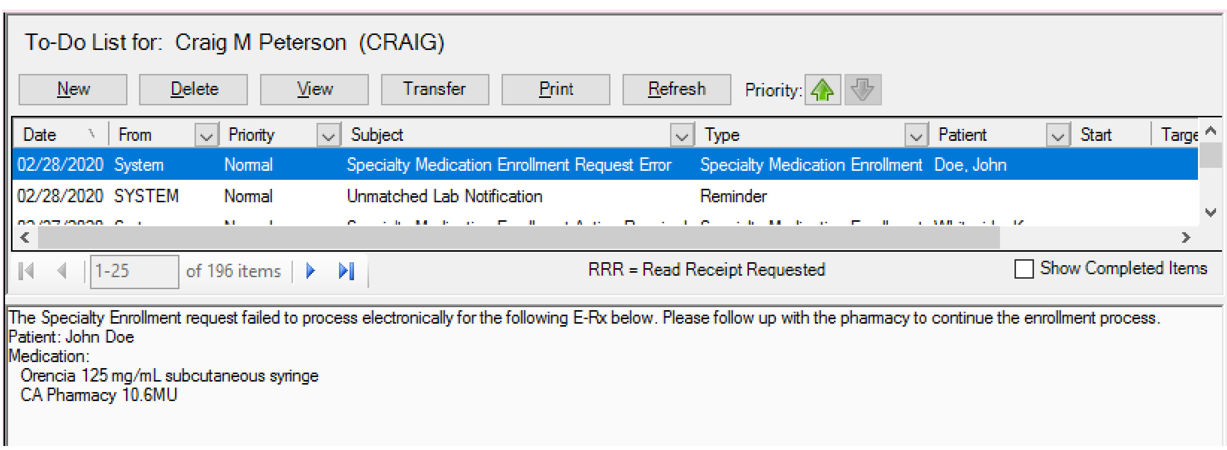


Figure 18 – To-Do List – Specialty Medication Enrollment Request Error