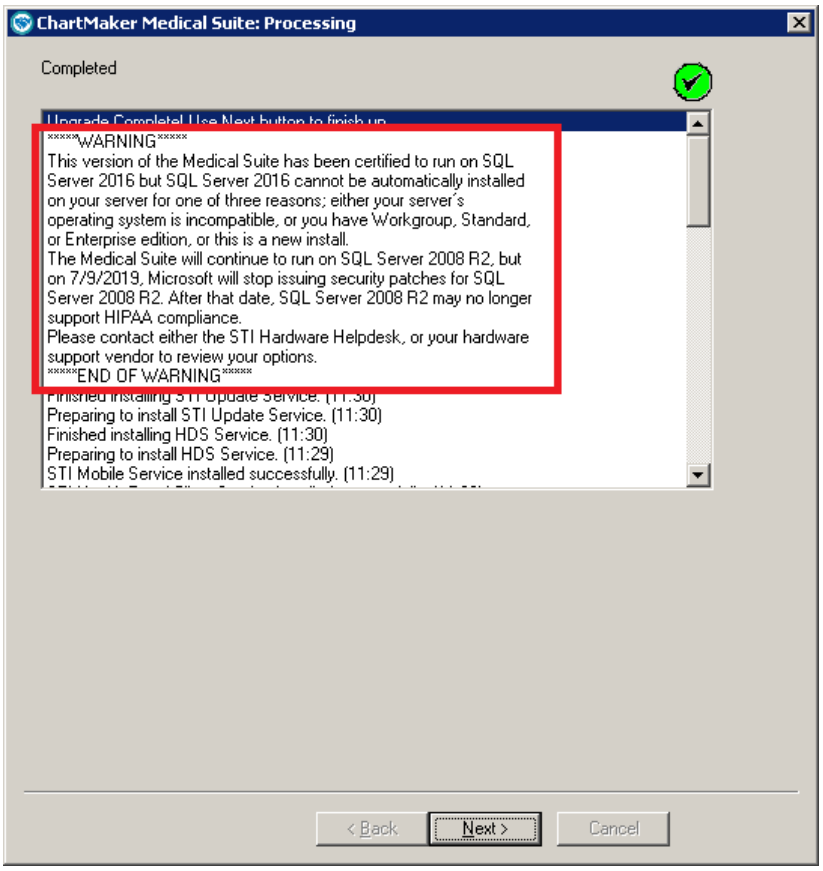
ChartMaker® Clinical Release Notes

ChartMaker® 2022.1 (fv6.7.2)

Important Notifications

- **Upgrade from Microsoft Server 2008/2012 and Windows 7/8 –** Since January 2020, your **Windows 7/8** workstations and **Microsoft 2008 Servers** are no longer supported. Likewise, support for **Windows 8.1** will end on January 10, 2023, and support for **Windows Server 2012/2012R2** will end on October 10, 2023. Even with security patches, **problems may still arise** if you choose not to upgrade. In addition, your workstations are not HIPAA compliant. To avoid these issues, 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

- **Direct Messaging – Generate and Attach CDA –** The **Export Patient Data** dialog, that is accessed via **Generated and Attach CDA** button in the **New Direct Message** dialog, has been updated to allow you to attach for export an episodic CDA document for specific chart notes via the Export By **Note** option. See Figure 1. This functionality works in a similar manner as when manually exporting patient data via **Chart** > **Export** > **Patient Data**. In the **Note Selection** field, you can choose the specific chart note that you want to use when exporting, and in the **Document Type** you can select the type of document you want to export. The options available in the Document Type field (Consultation Note, Discharge Summary, History and Physical Note, Lab Report, Note Summary, Procedure Note, Progress Note, Referral Summary, Pathology Report, and Radiology Report) have been updated to correspond to those Document Types selected in Note Header of the chart note. Also, when a note has a document type configured, that document type will default in the Document Type field when that note is selected. If there are multiple document types configured for a chart note, then the system will default the alphabetical first type. You can modify the Document Type as needed.

  Additionally, the Exported By selection options (Note and Date Range) have been moved to the bottom of the screen, and when the Export By **Date Range** option is selected, the **Open Referrals** field has been removed.

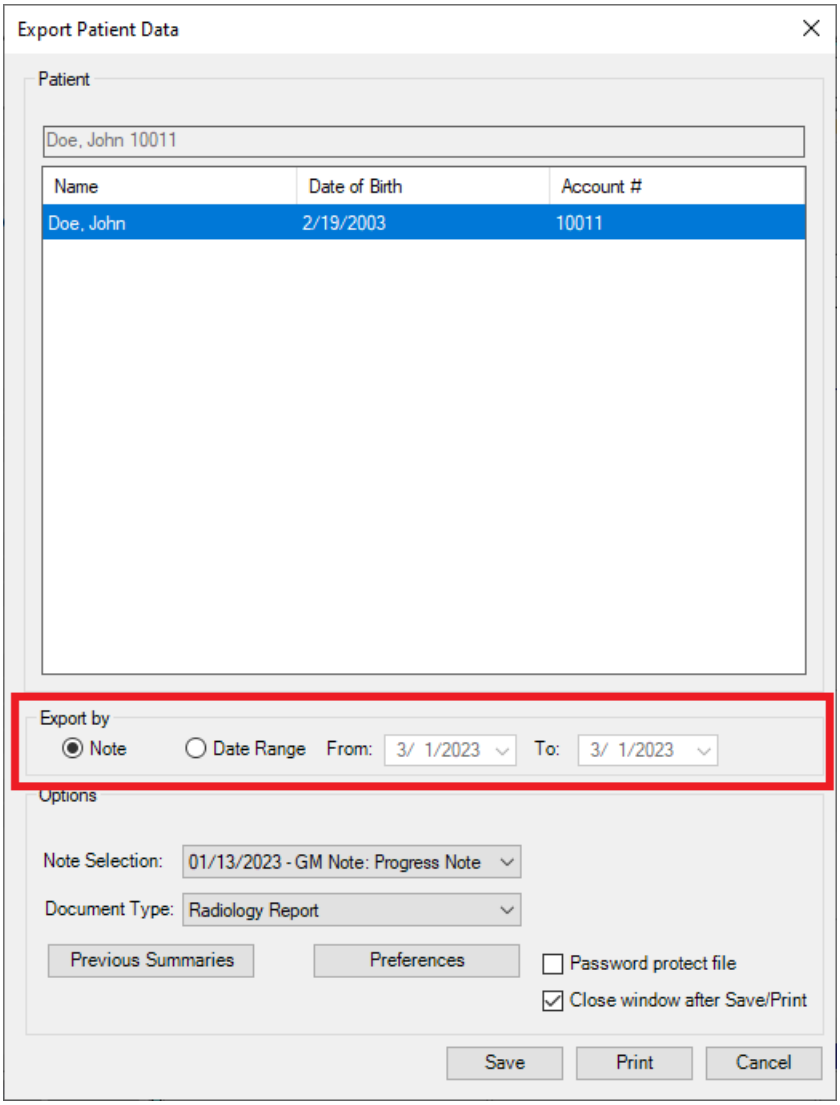


Figure 1 – New Direct Message – Generate and Attached CDA – Export Patient Data

Added Features (continued)

- **Direct Messaging – Import into chart –** The **Direct Message Import** dialog has been updated with a **Delete To-Do List Message** option, that allows you to determine whether the to-do list message is automatically deleted after the import. See Figure 2. This option will default to be checked and active when entering the Direct Message Import dialog, and works whether importing the message, a CDA, or other attached documents. After the **OK** button is clicked, the system will delete the to-do list item. If the **Cancel** button is clicked in the Direct Message Import dialog, the to-do list item will not be deleted. Likewise, if there is an error during the import, the to-do list item will also not be deleted.

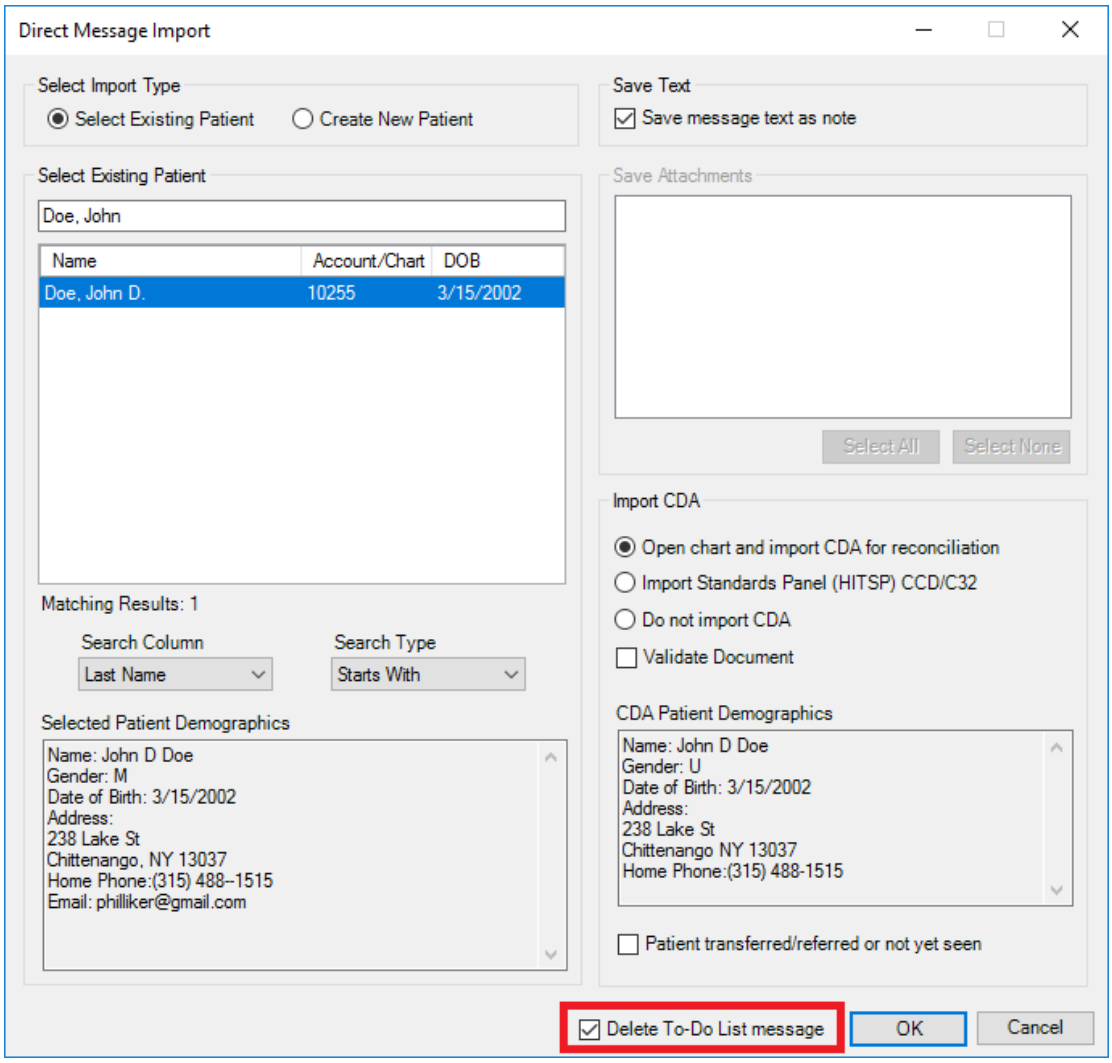


Figure 2 – Direct Message Import

- **Export – Note to File –** The Note to File functionality has been updated to include **all** external file types, including email (.EML) when exporting chart notes.

Added Features (continued)

- **Export – Export Patient Data –** The **Export Patient Data** dialog (accessed via **Chart** > **Export** > **Patient Data)**, has been redesigned so that the **Exported By** selection options (Note and Date Range) have been moved to the bottom of the screen. See Figure 3. Likewise, when the Export By Note option is selected, in the **Note Selection** field, you can choose the specific chart note that you want to use when exporting, and in the **Document Type** you can select the type of document you want to export. The options available in the Document Type field (Consultation Note, Discharge Summary, History and Physical Note, Lab Report, Note Summary, Procedure Note, Progress Note, Referral Summary, Pathology Report, and Radiology Report) have been updated to correspond to those Document Types selected in Note Header of the chart note. Also, when a note has a document type configured, that document type will default in the Document Type field when that note is selected. If there are multiple document types configured for a chart note, then the system will default the alphabetical first type. You can then modify the Document Type as needed.

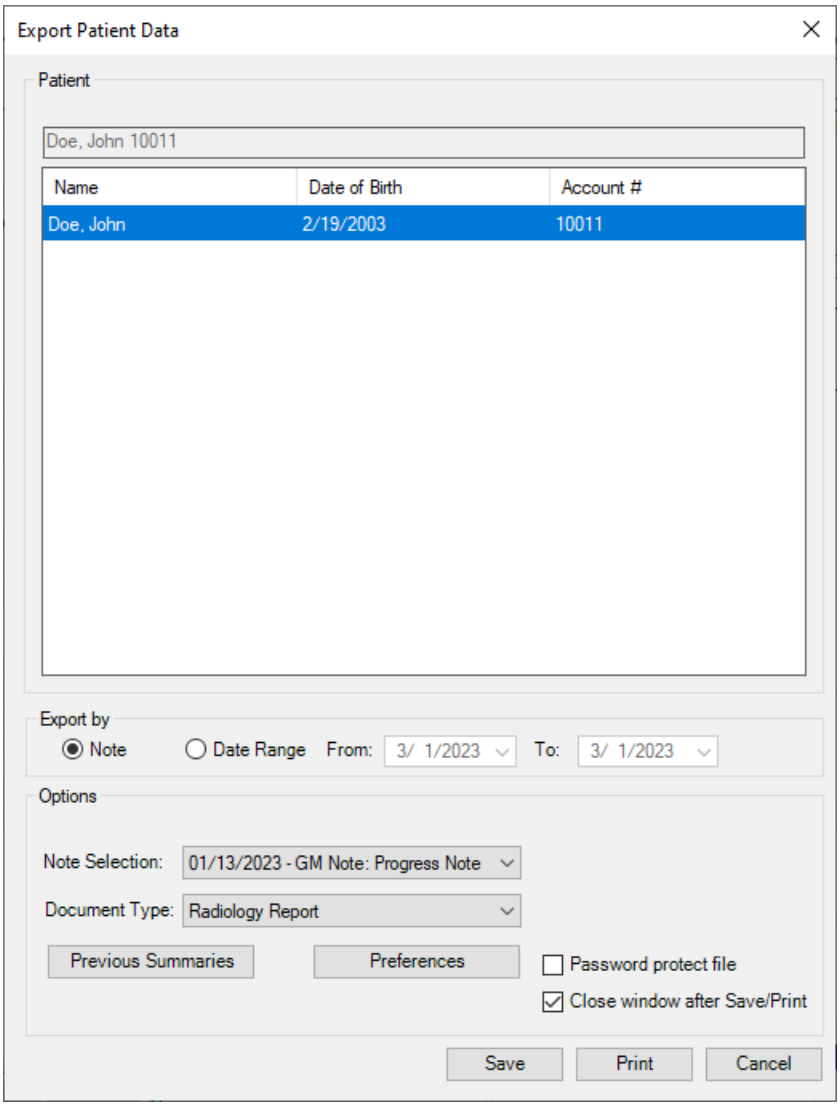


Figure 3 – Export Patient Data

Added Features (continued)

- **The ID Tab – Additional Patient Information –** The **Previous Name** section of the Additional Patient Information dialog (accessed via the **Additional Info** button), has been updated with **From** and **To** fields allowing you to configure a date range for the previous name. See Figure 4. When entering From/ To dates, you can enter just the Year, or Month and Year, or Month, Day, and Year; however, you cannot enter future dates, and the From date cannot have a later date than the To date. Likewise, if you enter a From date, you must enter a To date, and vice versa.

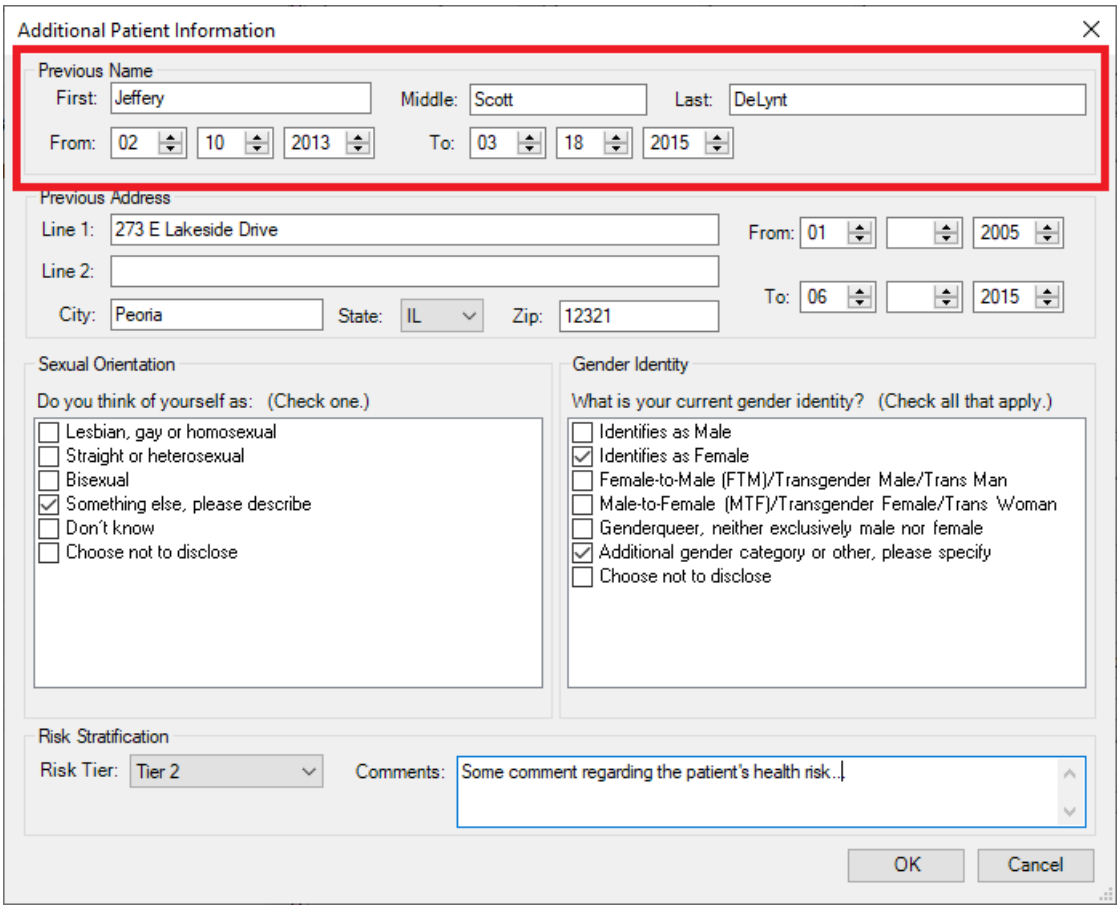


Figure 4 – ID Tab – Additional Patient Information

- **Medications – Electronic Prior Authorization (ePA) –** The system has been updated so that when viewing the work list for ePA (**Chart** > **Medication Prior Authorization** > **View Worklist**; or via the Facesheet menu, **EPA Status** > **View Worklist**), the user's default internet browser (Chrome, Firefox, Microsoft Edge) will open and display the worklist and a new pop-up message will appear outlining that you accessing the ePA worklist outside of Clinical and you can click the **Update ePA Status** button when finished making changes to update the patient facesheet. See Figure 5. Do note, that if you close out this dialog you can perform this same process via the facesheet menu, **ePA Status** > **Update Status**, for the applicable medication.

Added Features (continued)

Medications – Electronic Prior Authorization (ePA) (continued)

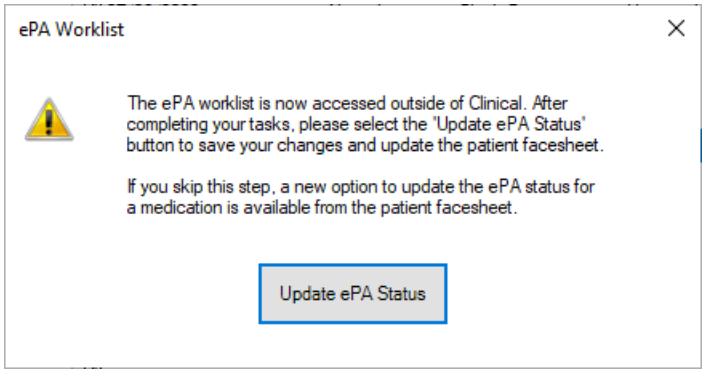


Figure 5 – ePA Worklist

In addition, the menu options to access the ePA worklist and update ePA status have been updated and/or created. The Chart > Medication Prior Authorization > Check Status menu has been updated to **Chart** > **Medication Prior Authorization** > **View Worklist**, and the Chart > Medication Prior Authorization > Management menu has been updated to **Chart** > **Medication Prior Authorization** > **User Management**. The facesheet menu has also been updated, the Open ePA Status dialog option has changed to **ePA Status** > **View Worklist**. Likewise, there is now an **ePA Status** > **Update Status** option and an **ePA Status** > **Clear ePA Status** option via the facesheet menu. See Figure 6.

Clicking the **Update Status** option retrieves the current ePA status from Surescripts and updates the facesheet with the corresponding status. Clicking the **Clear ePA Status** allows you to clear the current ePA status from the facesheet in cases where the authorization was handled outside of the program. When either of these two options are selected the system will track these changes in the audit trail.

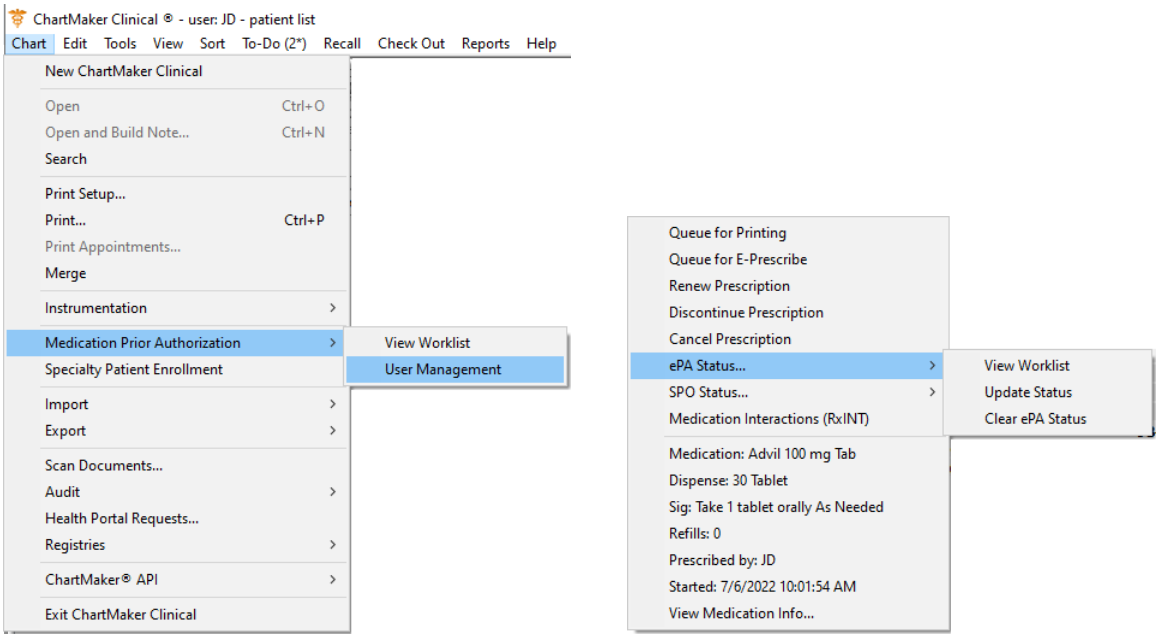


Figure 6 – Chart Menu and Facesheet Menu

Added Features (continued)

- **Medications – Special Patient Enrollment (SPO) –** The system has been updated so that when viewing the work list for SPO (**Chart** > **Special Patient Enrollment**; or via the Facesheet menu, **SPO Status** > **View Worklist**), the user's default internet browser (Chrome, Firefox, Microsoft Edge) will open and display the worklist and a new pop-up message will appear outlining that you accessing the SPO worklist outside of Clinical and you can click the Update SPO Status button when finished making changes to update the patient facesheet. See Figure 7. Do note, that if you close out this dialog you can perform this same process via the facesheet menu, **SPO Status** > **Update Status**, for the applicable medication.

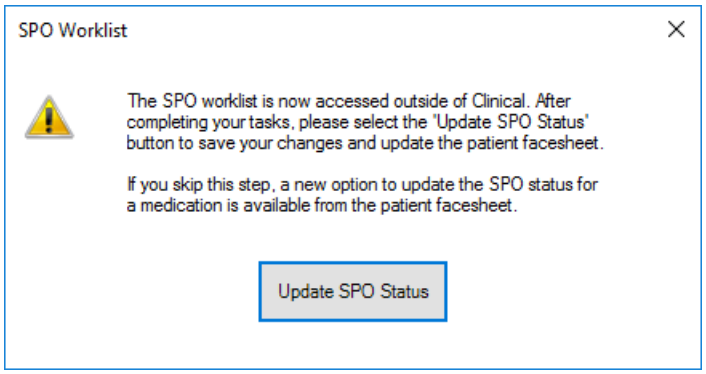


Figure 7 – SPO Worklist

In addition, the facesheet menu option to access the SPO worklist and update SPO status have been updated and/or created. The Open SPO Status dialog option has changed to **SPO Status** > **View Worklist**. Likewise, there is now an **SPO Status** > **Update Status** option via the facesheet menu. See Figure 8. Clicking the **Update Status** option retrieves the current SPO status from Surescripts and updates the facesheet with the corresponding status.

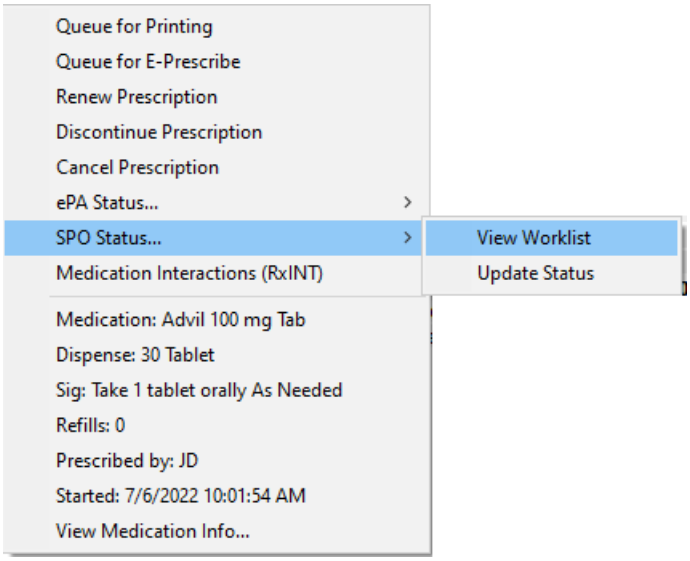


Figure 8 –Facesheet Menu – SPO Status

- **MIPS Dashboard – Quality –** In previous versions, when trying to **Print** a MIPS report that includes the **CMS 159v10 Depression Remission at Twelve Months measure**, in the Quality Measures dialog, the system would generate an error and the report would not be printed, nor would the Print dialog appear. This issue has been corrected.

Added Features (continued)

- **The Note Tab – Charge Items/Review Charges –** The **Billable Units** field in the Charge Items and Review Charges dialogs (**Note** > **Charge Items/Review Charges**) has been updated so that you can now configure between 1 and 9999 units. See Figure 9.

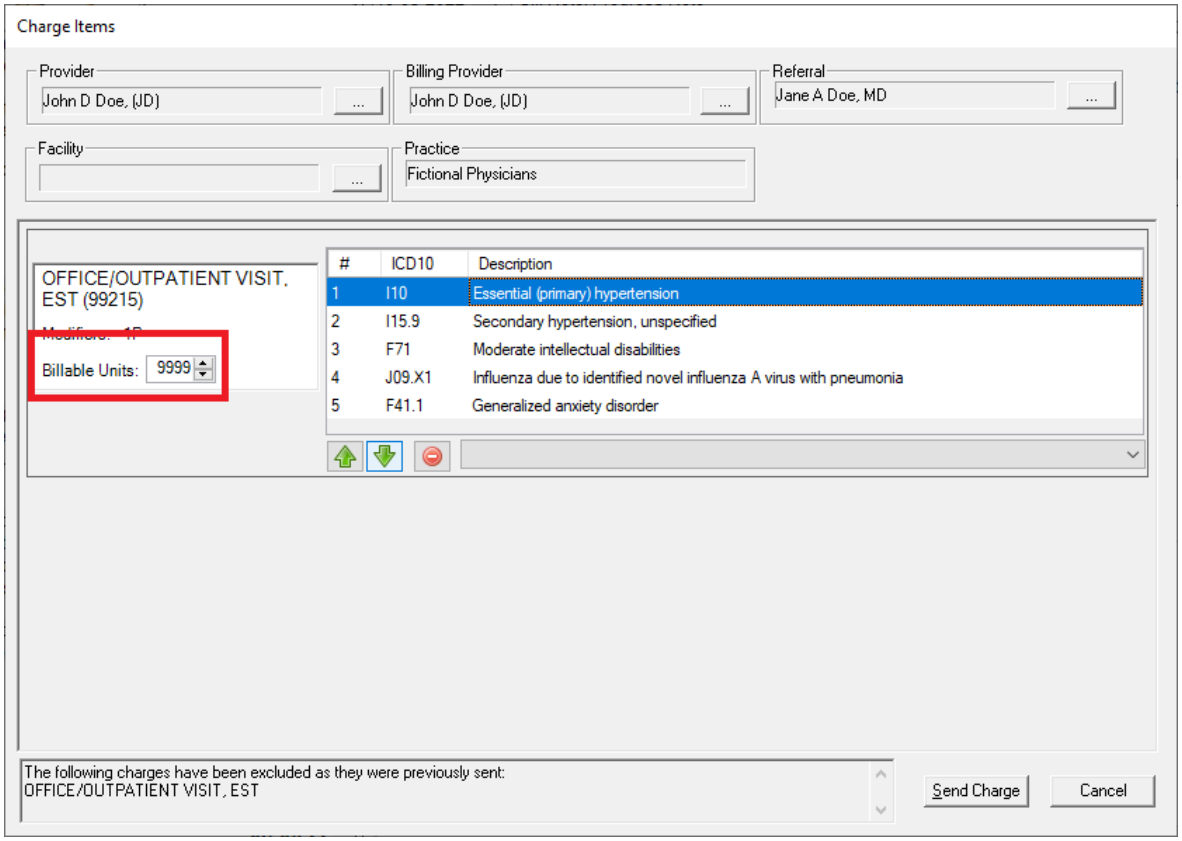


Figure 9 – Charge Items

- **The Note Tab – Cosign –** The system has been updated to better display the way a cosigner's signature is designated in a chart note. The co-signature will now appear directly below the original signer, where any Topaz signature will appear (when used), then an **Electronically co-signed by:** label followed by the co-signer's name and date/time stamp (when used), and then any cosignatory comments and corrections that were entered at the time of cosigning. See Figure 10.

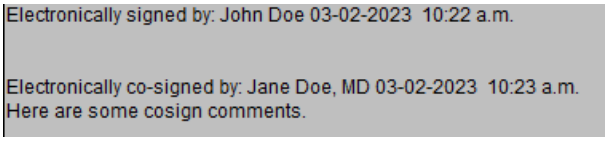


Figure 10 – Note – Co-Sign Signature

- **The Note Tab – Order Procedure - Immunizations –** The system has been updated so that whenever an immunization procedure is entered via the Order Procedure dialog in Clinical, the immunization record for that procedure will only be sent to the immunization registry, when the patient is registered for an immunization registry, after the note has been signed.

Added Features (continued)

- **The Note Tab – Referral – SNOMED –** The **Category** field in the **Search List** dialog, accessed via the **Search** button in the **SNOMED Selection** section of the New Referral or Edit Referral dialog, has been updated with an **<All>** category allowing you to search all SNOMED Codes when attaching SNOMED Codes to referral. See Figure 11.

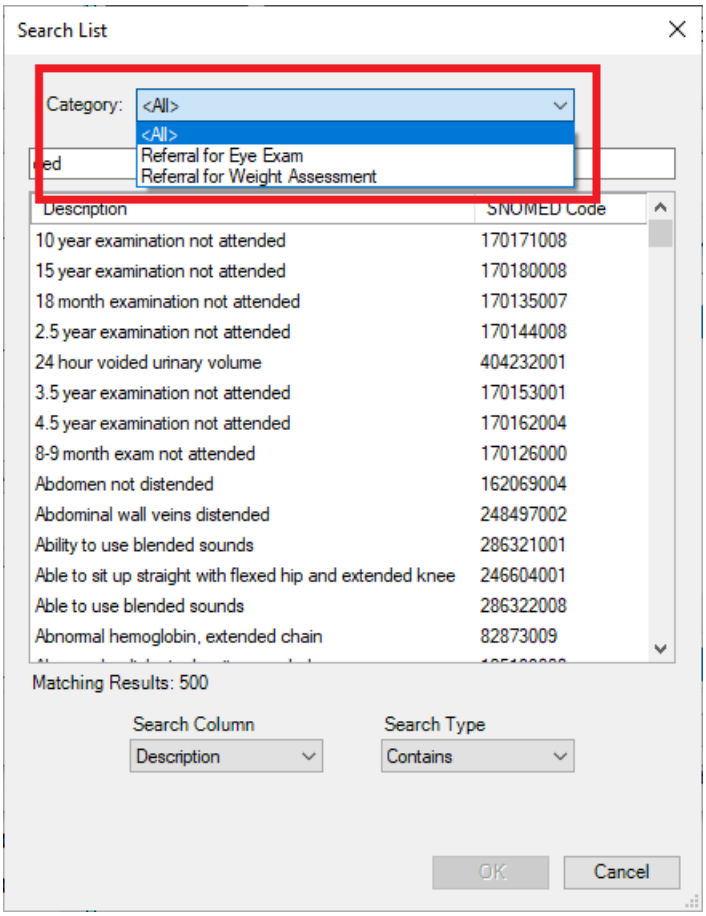


Figure 11 – New/Edit Referral – SNOMED – Search List

Added Features (continued)

- **The Note Tab – Screening –** In previous versions the last question in the Quick Depression Assessment Panel (PHQ9) was incorrectly included in calculating the **Total Score**. This issue has been corrected so that this last question is not included when calculating the Total Score. Likewise, the verbiage at the bottom of the screen has been updated to include information regarding this last question not being included in the Total Score calculation. See Figure 12.

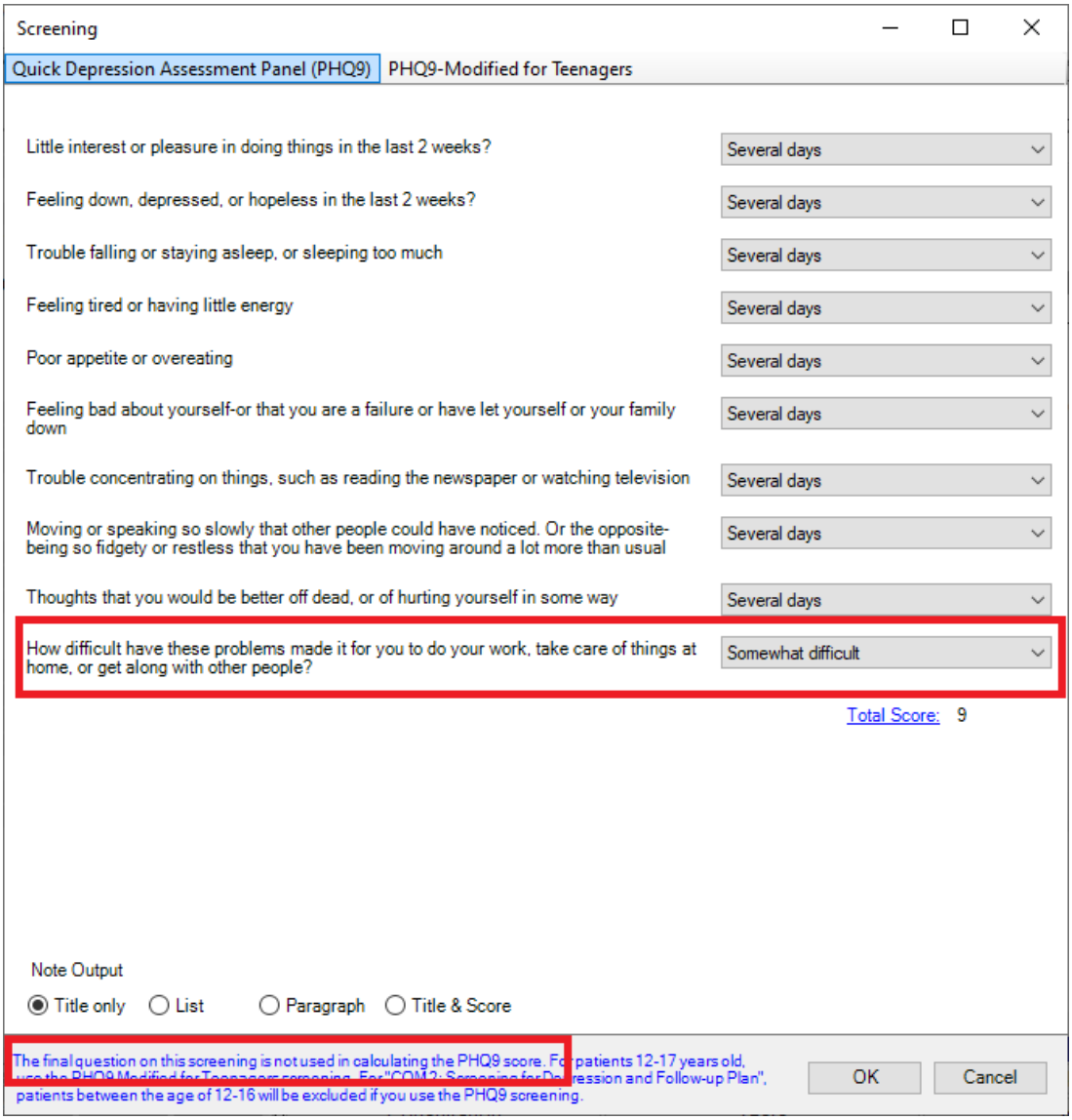


Figure 12 – Screening – PHQ9

- **Organizer – Export–** The **Export Selected Note(s) to File** and **Export All Chart Notes to File** functionality (accessed via the right-click menu), has been updated to include **all** external file types, including email (.EML) when exporting chart notes.

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