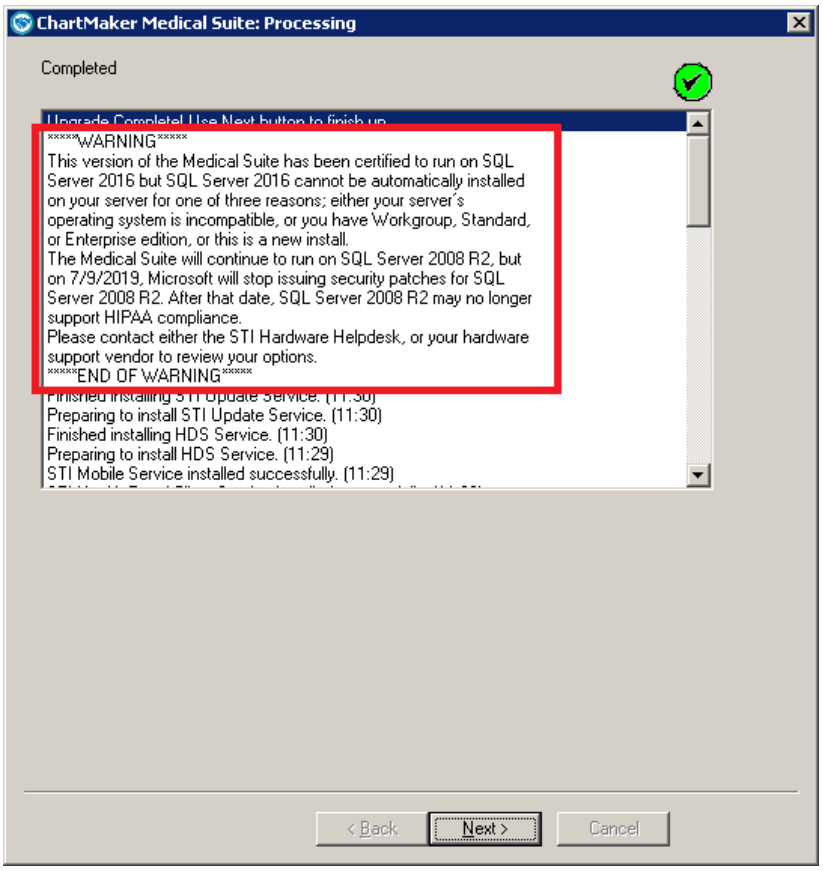
ChartMaker® Clinical Release Notes

ChartMaker® 2022.1 (fv6.7.8)

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

- **Audit Trail –** The Audit Trail has been updated to track when reconciling clinical information, by clicking the **Reconcile** button in a Document Import note, but the imported CDA contains no medications, diagnoses, or allergies to reconcile. When an audit event occurs, the Event column will display **Confirmed**; the Group column will display **Note**; the Audit Trail Description will display the **CIR Performed: No Medications to Import, No Diagnoses to Import, No Allergies to Import**; and the **Account ID**, **Note Header (Comment)**, **Note ID** and **Visit Date** will be listed in the Metadata column.

- **Audit Trail –** The Audit Trail has been updated to track when any modifications are made to the **Patient Assignment** widget in chart note. When an audit event occurs, the Event column will display **Modified**; the Group column will display **Patient Assignment**; the Audit Trail Description will display **Patient Assignment modified**; the Old Value will display the previous answers to the 4 questions; the New Value will display the updated answers to the 4 questions in the widget; and the Metadata column will contain the **Account ID**, **Note Header (Comment)**, **Note ID**, and **Visit Date**.

- **Export – Health Information Exchange –** In previous versions, an issue could arise where unstructured documents (i.e, scans) were exported to HIEs, resulting in an invalid document type error. This issue has been corrected.

- **Import Patient Data – Reconcile–** To provide a visual cue that the clinical information reconciliation was performed for Document Import notes, the system has been updated so that after reconciling the clinical information for Document Import notes, via the Clinical Information Reconciliation (CIR) dialog, the system will display, "Clinical information reconciliation was performed," in the note output next to the Reconcile button. See Figure 1.

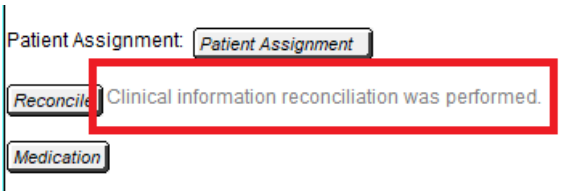


Figure 1 – Chart Note – Document Import – Reconcile

Likewise, if there is no clinical information to reconcile, after the No Information pop-up message has been acknowledged, the system will display, "Clinical information reconciliation was performed," in the note output next to the Reconcile button. See Figure 2.

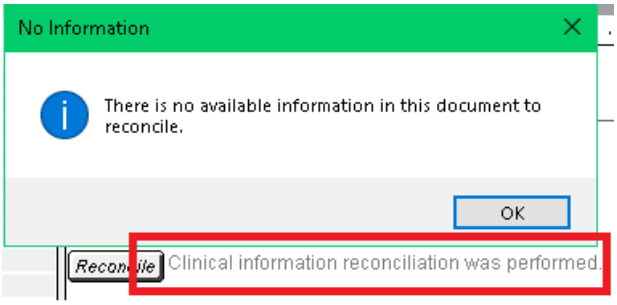


Figure 2 – Chart Note – Document Import – No Information

Added Features (continued)

- **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 – Order Procedure – Immunizations –** The **Manufacturers and Lot Numbers for this Procedure** section of the **Order Procedure** dialog, when an immunization procedure is being entered, has been updated with a **Storage Unit(s)** column that will display any storage unit codes that are configured for the Lot Number. See Figure 3.

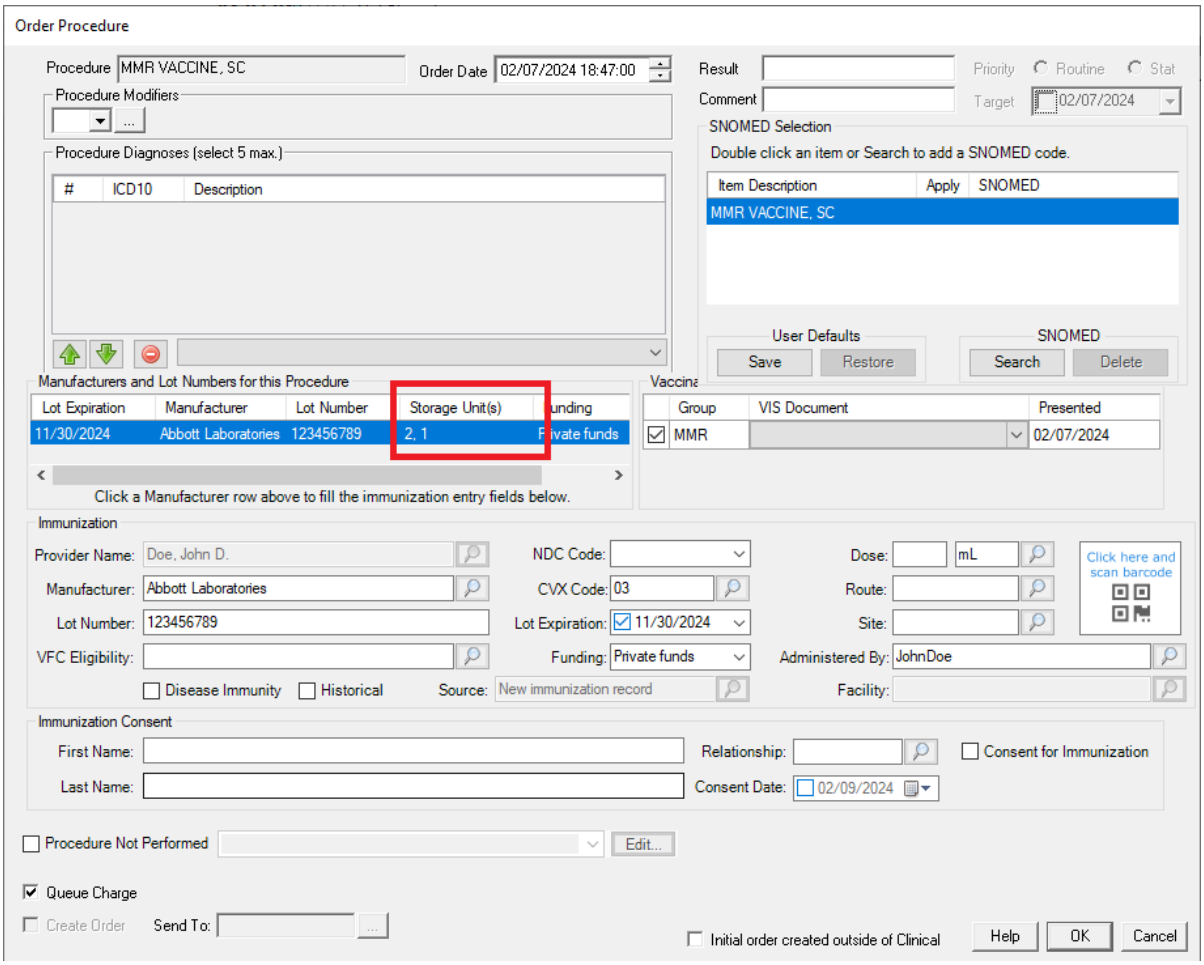


Figure 3 – Order Procedure – Immunization

Added Features (continued)

- **The Note Tab – Screening –** The **Procedure refused** and **Stopped by patient** options in the **Screening not done for patient reason** drop-down list of the **Blessed Orientation Memory Concentration Test (Cognitive Assessment)** screening, have been updated with the most recent SNOMED Codes (**443390004** and **713247000**) and will be displayed in the **History** tab when these options are selected. See Figure 4. Likewise, when these options are selected, they will be accurately included when calculating any denominator exception cases for the CMS 149 Dementia: Cognitive Assessment measure.

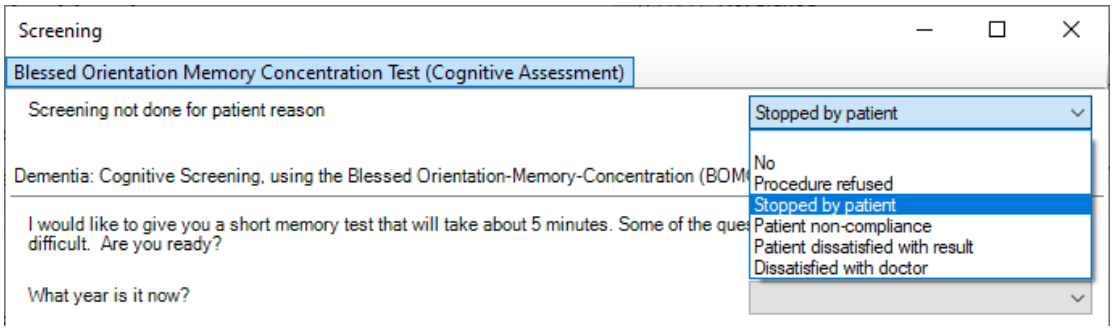


Figure 4 – Screening – Blessed Orientation Memory Concentration Test (Cognitive Assessment)

- **Preferences — Procedures –** The **Procedures** tab has been updated with a new **Immunizations** section that contains a new **Send patient immunizations to registries on note save instead of sign** option. See Figure 5. This preference option is a global preference for all users and is unchecked by default. When this preference is activated (checked), the system will send any immunizations to the applicable registries upon saving a note, instead of waiting until the note is signed.

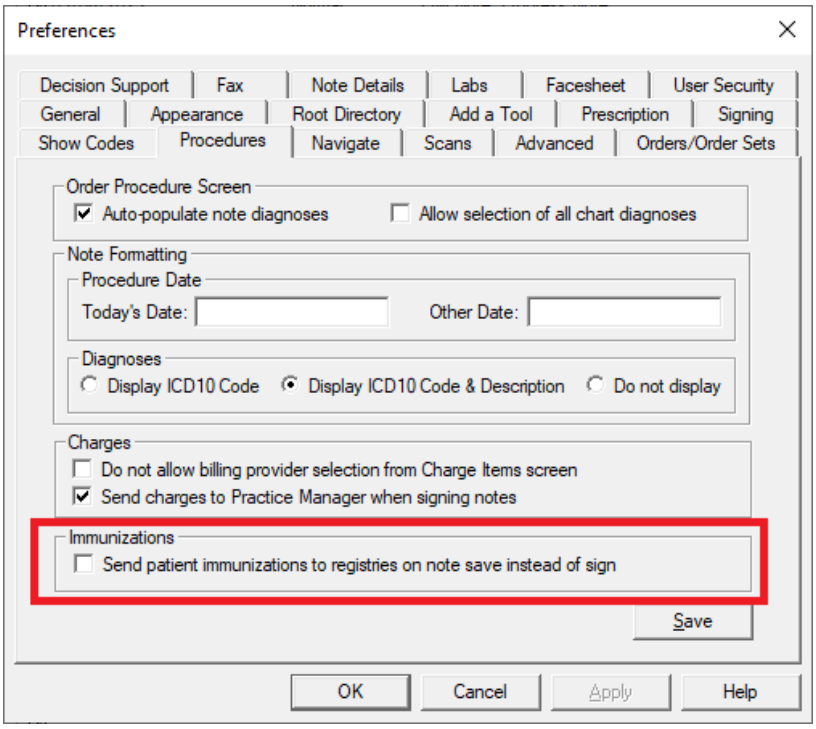


Figure 5 – Preferences – Procedures

Added Features (continued)

- **Reports — Vaccine Inventory –** The system has been updated with a new **Vaccine Inventory Report** (accessed via **Reports** > **Vaccine Inventory**), that allows you to easily view inventory for all vaccine lots configured in the system without having to access each procedure to view the inventory information. The report will default to display **Immunization**, **CPT Code**, **Manufacturer**, **Lot #**, **Expiration**, **Funding**, **Storage**, **Quantity**, and **Reorder Point** for each storage unit associated with an active vaccine lot number. All column headings are sortable by clicking the specific column heading you want to sort by, and you can also select a specific Immunization, CPT Code, Manufacturer, Lot #, Funding, and/or Storage unit via the corresponding drop-down list. See Figure 5.

  Likewise, you have the option to view **Immunizations that need to be reordered** and/or **Include expired immunization lots**, by checking the corresponding options at the bottom of the screen. When Quantities are below the Reorder point, they will appear in red. When the **Include expired immunization lots** option is checked, expired vaccine lots will also appear in red.

  Clicking the **Refresh** button will query the system and display any newly added or modified vaccine information, and clicking the **Save Report** button will save the currently configured report as a PDF file. When printing the report any items displayed in red on the screen will appear in boldface in the printed report.

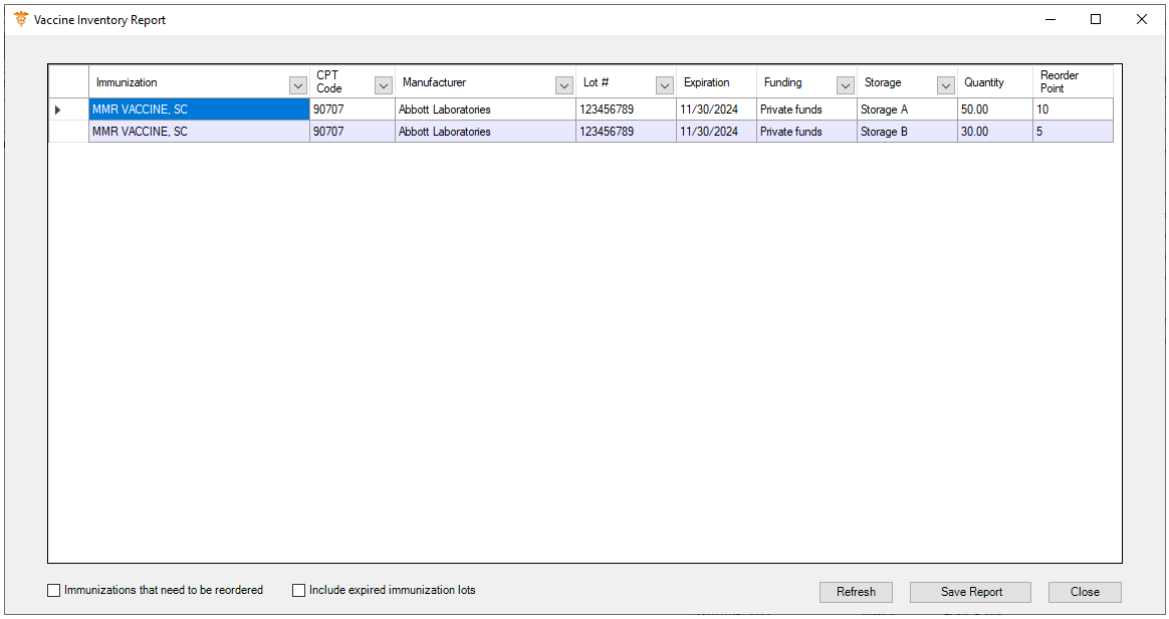


Figure 6 – Vaccine Inventory Report

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