




ChartMaker® Mobile Release Notes

ChartMaker® 2018 (fv6.3.0 R1) (Deployed 05/29/2018)

ChartMaker Mobile 6.3.0 R1 Enhancements

General

- **Landscape Viewing** –ChartMaker Mobile has been updated to allow landscape viewing for all pages throughout the mobile app. Once the landscape orientation is detected, the screen will convert to landscape mode and you will be able to access, configure, view, and scroll through information in this mode as needed. Once the portrait orientation is detected, the screen will revert to portrait mode, and you will be able to access, configure, view, and scroll through information in this mode.
- **FAQs** –The FAQs page, (accessed by tapping the  icon in the top-left to access the Mobile menu, then tapping **Help & About**, and then **FAQs**) has been updated with information about icons, features, and help regarding Charges, Rounds, and viewing patient notes.

Patient

- **General** – The Patient area of ChartMaker Mobile has been updated to provide a more enhanced user experience when viewing information for a patient. Screen names have been relabeled (**Patient, Health Info, Charge History**, and the new **Records (Beta)** page), and the icons at the bottom have been labeled (**Patient, Health, Charges, Records**) to allow easier access to the information you want to view for a patient. See Figure 1 -3.

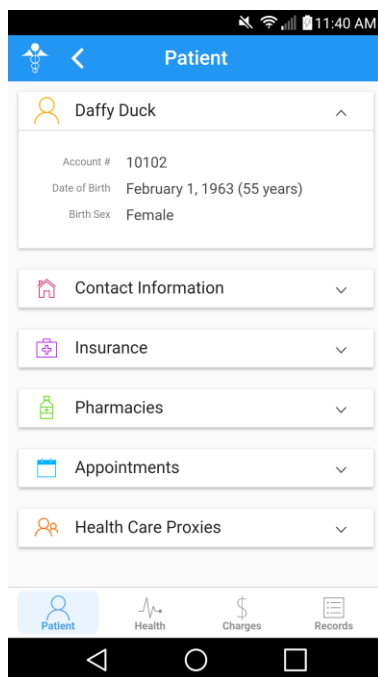


Figure 1 – Patient

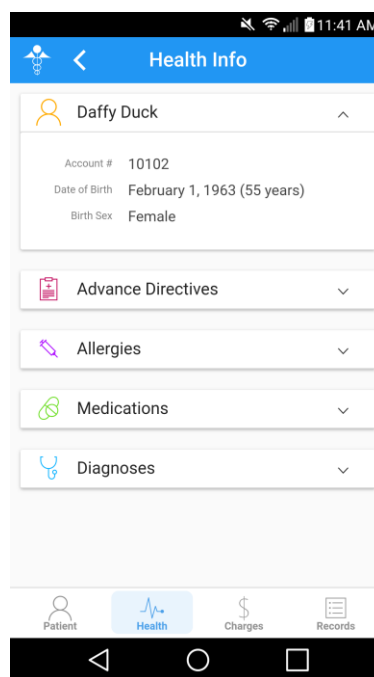


Figure 2 – Health Info

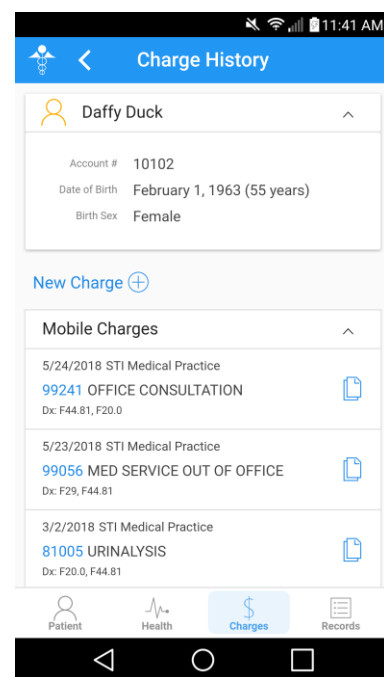




Figure 3 – Charge History

Patient (continued)

- **Records (BETA)** – A new Records (BETA) screen has been created that allows you to view, in read-only text format, chart notes and lab results for the patient. Do note, to utilize this new feature requires your ChartMaker® Medical Suite to be updated to the version ChartMaker 2018 (fv 6.3.0.409) or higher. The Records (BETA) screen is accessed via the new **Records**  icon at the bottom of the Patient, Health Info, or Charge History screens.

Upon entering the Records screen, if you do not have a **Charts** privilege of **Read, Write, Sign w/ Co-Sign**, or **Sign**, configured in the Clinical application, you will not be able to view chart notes in the Mobile app and a message will appear like the one in Figure 4. Likewise, if you do not have a **Lab Review** privilege of **All**, any lab reports and/or results will not be accessible in the Records (Beta) page, and when accessing the Results filtering option, a similar message will appear as when you do not have the proper Charts privilege. See Figure 5. If you do have proper permission, the Records page will load the chart notes and/or lab results for the selected patient. See Figure 6.

In the Records page you can scroll through the available notes and labs for the patient. The notes will be color-coded in the app based on the folder in which that note resides in, which matches the folder colors in Clinical. You can choose to only view chart notes by tapping the **Notes** option at the top of list, or you can view only notes that contain results by tapping the **Results** option at the top of the list. When either of these options is selected, they will become highlighted to indicate the type of filtering. You can simply tap the highlighted option to disable the filtering. Likewise, you can filter the notes in descending or ascending date order by tapping the  icon. The note order defaults to descending date order.

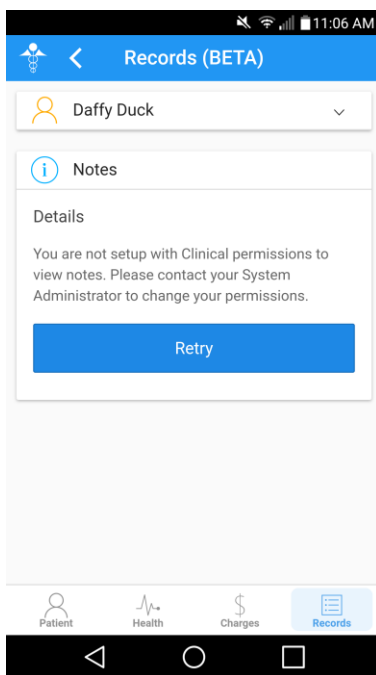


Figure 4 – Records (BETA)

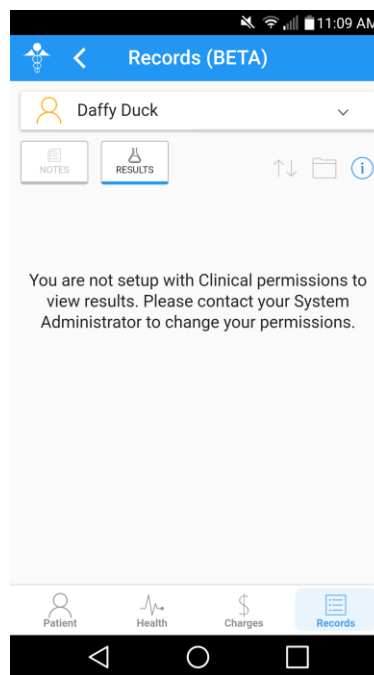


Figure 5 – Records (BETA) – Results

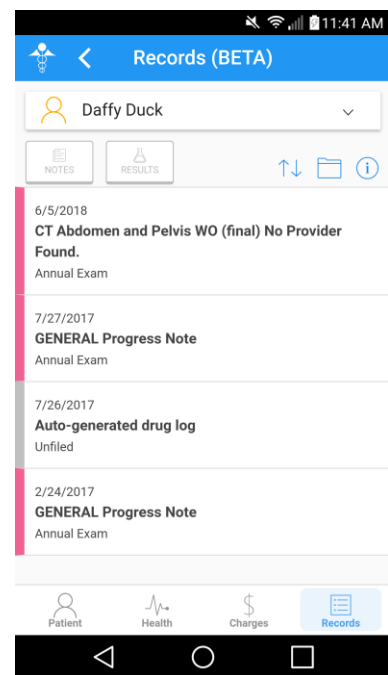




Figure 6 – Records (BETA) (W/Permission)

Patient (continued)


Records (BETA) (continued)

You can also filter chart notes by a specific organizer folder clicking the  icon. When the  icon is clicked, a folder list, based on those folders that contain notes for the patient, will appear allowing you to select which folder you want to view notes for. See Figure 7. When a folder is selected, only that folder's notes will be visible, unless the **All** option is selected, and then all notes will be visible.

Once the desired note is located, you can tap on that note to view the details in the Note Details screen, or tap a lab to view the details in the Result Details screen. See Figure 8 and 9. Do note, if you do not have **Transcription** privileges, signed notes will not be accessible.

At the top of the Notes Details and Result Details screens, the Chart Header information will appear outlining the note **Date**, **Provider**, **Facility**, **Case**, **Signed by**, and **Folder** information in a similar manner as it appears in Clinical. The chart header information can be hidden by tapping the **Chart Name** at the top of the screen. When viewing note information in the Notes Details screen, embedded objects such as imported CDA documents, images, grid data, and other external file information, as well as any information entered through the Confidential widget, will not be available for viewing at this time. Likewise, when viewing lab result information in the Result Details screen, some parts of the lab such as embedded PDFs and scanned images will not be available for viewing at this time. Therefore, be aware, that you may not be viewing the patient's complete medical record, in the mobile app, when making medical decisions. If you need to view this information you will have to open the patient's record in the Clinical application.

In the Note Details and Result Details screens you can scroll up and down to view additional information in the note or lab. Likewise, you can swipe right to left to advance to the next note or lab in the list, or swipe left to right to view the previous note or lab in the list, without leaving the Note Details or Result Details screen.

When viewing a lab in the Result Details screen, you can view the reporting info for the lab by clicking **Report info for MM/DD/YYYY** link. This will open a Report Info page listing the **Status**, **Lab Name**, **Patient Name**, **Patient DOB**, **Date Reported**, **Date Collected**, **Ordering** provider, **Attending** provider, **Date Entered**, **Requisition**, **Patient Lab ID**, and **Control Number** for the select lab. Likewise, if there are any comments for the lab an  icon will appear to the right of the Report info link, and if you tap it the comment will display.

When finished viewing the note or lab information, tap the **X** in the left corner to return to the Records page for the selected patient.

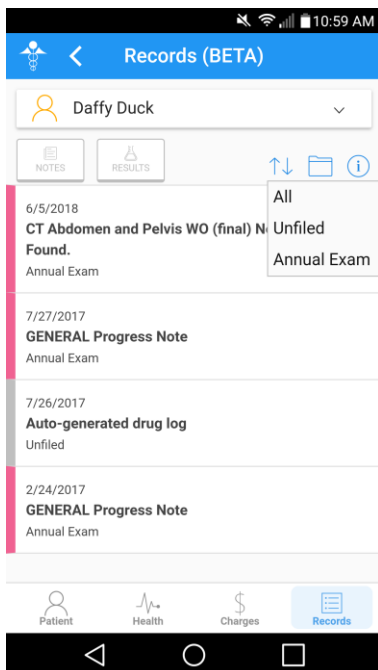


Figure 7 – Records – Folder Filtering

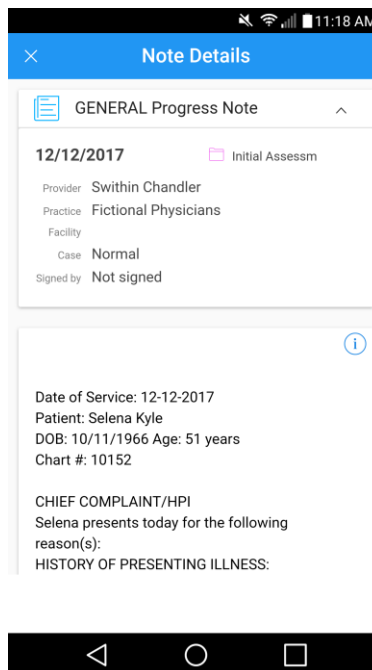


Figure 8 – Note Details

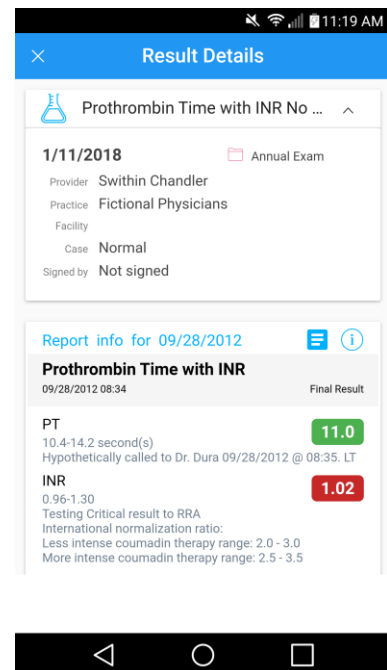


Figure 9 – Result Details

ChartMaker® Medical Suite Enhancements for ChartMaker® Mobile 6.3.0 R1

Clinical

- **System Tables – Mobile – Mobile Administration** – The **Audit** tab, in the Mobile Administration dialog, has been updated to track to when the Record screen has been accessed for a patient to view chart notes for that patient, as well as when a specific note is viewed for a patient in the Note Details screen, in ChartMaker® Mobile. See Figure 17.

When an audit event occurs for accessing the Record screen for a patient to view their note list, the Activity Type column will display **Note View**, the User will display the **[User]** that accessed the Records screen in the mobile app, the Account# column will display the patient's **[Account Number]**, the Patient Name column will display the patient's **[Name]**, and the Additional Info column will display **Viewed from Notes list screen**.

When an audit event occurs for accessing a specific chart note for a patient in the Note Details screen in the mobile app, the Activity Type column will display **Note View**, the User will display the **[User]** that accessed the specific chart note in the mobile app, the Account# column will display the patient's **[Account Number]**, the Patient Name column will display the patient's **[Name]**, and the Additional Info column will display the **Note ID, Note Heading, Visit Date, and Viewed From Note Details screen**.

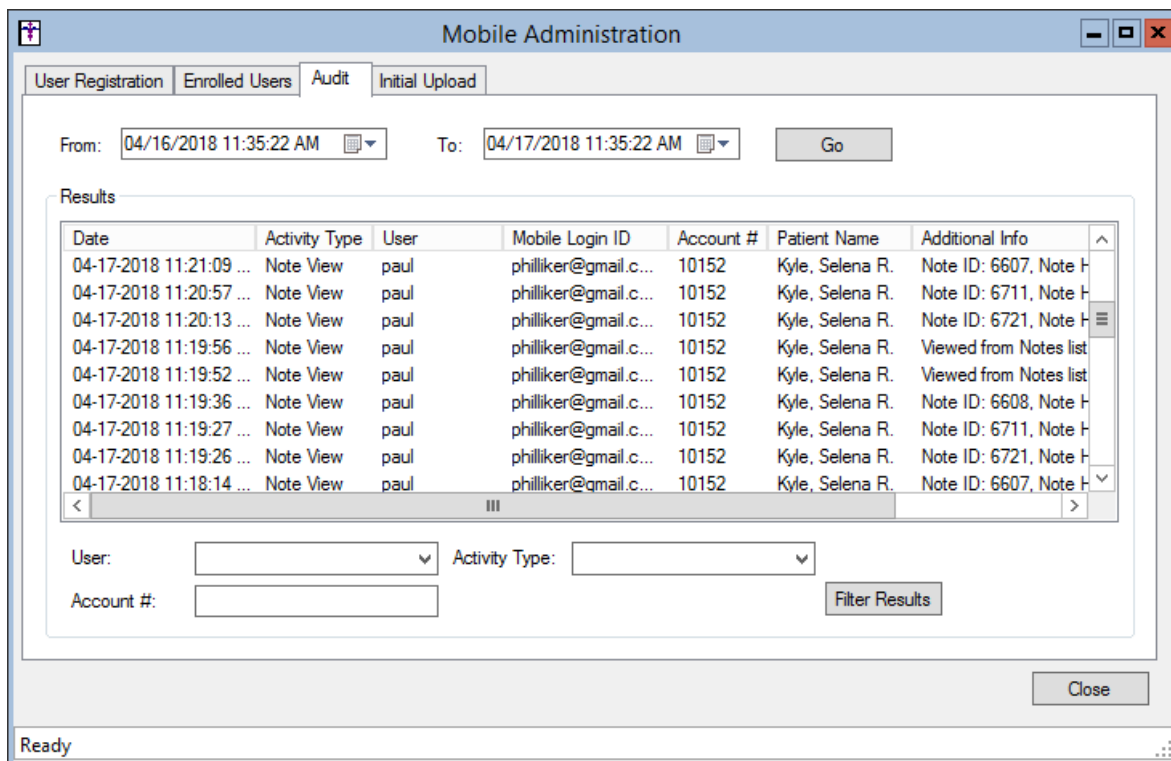


Figure 17 – Mobile Administration – Audit

Practice Manager

- Administration – Mobile – Mobile Administration** – The **Audit** tab, in the Mobile Administration dialog, has been updated to track to when the Record screen has been accessed for a patient to view chart notes for that patient, as well as when a specific note is viewed for a patient in the Note Details screen, in ChartMaker® Mobile. See Figure 17.

When an audit event occurs for accessing the Record screen for a patient to view their note list, the Activity Type column will display **Note View**, the User will display the **[User]** that accessed the Records screen in the mobile app, the Account# column will display the patient's **[Account Number]**, the Patient Name column will display the patient's **[Name]**, and the Additional Info column will display **Viewed from Notes list screen**.

When an audit event occurs for accessing a specific chart note for a patient in the Note Details screen in the mobile app, the Activity Type column will display **Note View**, the User will display the **[User]** that accessed the specific chart note in the mobile app, the Account# column will display the patient's **[Account Number]**, the Patient Name column will display the patient's **[Name]**, and the Additional Info column will display the **Note ID, Note Heading, Visit Date,** and **Viewed From Note Details screen**.

The screenshot shows the 'Mobile Administration' window with the 'Audit' tab selected. The 'From' date is 04/16/2018 11:35:22 AM and the 'To' date is 04/17/2018 11:35:22 AM. The 'Results' table contains the following data:

Date	Activity Type	User	Mobile Login ID	Account #	Patient Name	Additional Info
04-17-2018 11:21:09 ...	Note View	paul	philliker@gmail.c...	10152	Kyle, Selena R.	Note ID: 6607, Note H
04-17-2018 11:20:57 ...	Note View	paul	philliker@gmail.c...	10152	Kyle, Selena R.	Note ID: 6711, Note H
04-17-2018 11:20:13 ...	Note View	paul	philliker@gmail.c...	10152	Kyle, Selena R.	Note ID: 6721, Note H
04-17-2018 11:19:56 ...	Note View	paul	philliker@gmail.c...	10152	Kyle, Selena R.	Viewed from Notes list
04-17-2018 11:19:52 ...	Note View	paul	philliker@gmail.c...	10152	Kyle, Selena R.	Viewed from Notes list
04-17-2018 11:19:36 ...	Note View	paul	philliker@gmail.c...	10152	Kyle, Selena R.	Note ID: 6608, Note H
04-17-2018 11:19:27 ...	Note View	paul	philliker@gmail.c...	10152	Kyle, Selena R.	Note ID: 6711, Note H
04-17-2018 11:19:26 ...	Note View	paul	philliker@gmail.c...	10152	Kyle, Selena R.	Note ID: 6721, Note H
04-17-2018 11:18:14 ...	Note View	paul	philliker@gmail.c...	10152	Kyle, Selena R.	Note ID: 6607, Note H

Below the table are filters for 'User', 'Activity Type', and 'Account #', along with a 'Filter Results' button. A 'Close' button is located at the bottom right of the window.

Figure 17 – Mobile Administration – Audit