

ChartMaker[®] Practice Manager

Please note that the ChartMaker Medical Suite can no longer be installed on computers using the Windows XP or Windows 2003 Server operating system. Since Microsoft has discontinued support for Windows XP in April 2014, and Windows 2003 Server in July 2015, we can no longer guarantee the stability of computers using this operating system, and recommend that you upgrade the operating system on any computers currently using Windows XP or Windows 2003 Server.

Administration

- Administration – Code Tables – Codes – Ethnicity** – The system has been updated to allow you to add and maintain Ethnicity codes via the Ethnicity Table Maintenance dialog (accessed via **Administration > Code Tables > Codes**, highlighting **Ethnicity** and clicking the **Maintain Code Table** button). See Figure 1. When adding a new code, you have the ability to provide a **Code Value**, **Description**, and linking that code to **Standard Mapping** option. When editing you can modify the Description or Standard Mapping option for the code you are editing. The system will automatically update the particular ethnicity with a Top Level code, or parent ethnicity category, based on the CDC code set. The Standard Mapping and Top Level codes will be included, as applicable, when exporting documentation for immunizations and CDAs.

Code	Description	Standard Mapping	Top Level	Active	System
1	Hispanic or Latino	Hispanic or Latino (2135-2)	Hispanic or Latino (2135-2)	Active	Y
2	Not Hispanic or Latino	Not Hispanic or Latino (2186-5)	Not Hispanic or Latino (2186-5)	Active	Y
3	Declined to Specify			Active	Y
And	Andalusian	Andalusian (2138-6)	Hispanic or Latino (2135-2)	Active	N
can	canarian	Canarian (2145-1)	Hispanic or Latino (2135-2)	Active	N
Ni	Nicaraguan	Nicaraguan (2159-2)	Hispanic or Latino (2135-2)	Active	N
uru	Uruguayan	Uruguayan (2173-3)	Hispanic or Latino (2135-2)	Active	N

Code Value: Active

Description:

Standard Mapping: ▼

Figure 1 – Ethnicity Table Maintenance

Administration (continued)

- Administration – Code Tables – Codes – Race** – The Race Table Maintenance dialog (accessed via **Administration > Code Tables > Codes**, highlighting **Race** and clicking the **Maintain Code Table** button) has been updated with a new **Top Level** column. See Figure 2. When entering or editing a particular Race code, you will be required to select a Standard Mapping option for the code you are entering or editing. The system will automatically update the particular race with a Top Level code, or parent race category, based on the CDC code set. The Standard Mapping and Top Level codes will be included, as applicable, when exporting documentation for immunizations and CDAs.

Code	Description	Standard Mapping	Top Level	Active	System
A	Asian	Asian (2028-9)	Asian (2028-9)	Active	Y
AIN	American Indian or Alaska Native	American Indian or Alaska Native (10...	American Indian or Alaska Native (100...	Active	Y
ale	aleut	Aleut (1966-1)	American Indian or Alaska Native (100...	Active	N
B	Black or African American	Black or African American (2054-5)	Black or African American (2054-5)	Active	Y
Bur	Burmese	Burmese (2032-1)	Asian (2028-9)	Active	N
Eng	English	English (2110-5)	White (2106-3)	Active	N
H	Hispanic	White (2106-3)	White (2106-3)	Active	Y
Moh	Mohawk	Mohawk (1287-2)	American Indian or Alaska Native (100...	Active	N
Nak	Naknek	Naknek (1935-6)	American Indian or Alaska Native (100...	Active	N
NHO	Native Hawaiian or Other Pacific Islan...	Native Hawaiian or Other Pacific Islan...	Native Hawaiian or Other Pacific Islan...	Active	Y
PDS	Declined to Specify			Active	Y
W	White	White (2106-3)	White (2106-3)	Active	Y

Code Value: Active

Description:

Standard Mapping: ▼

Buttons: New, Edit, Delete, Save All, Cancel All, Add To List, Cancel

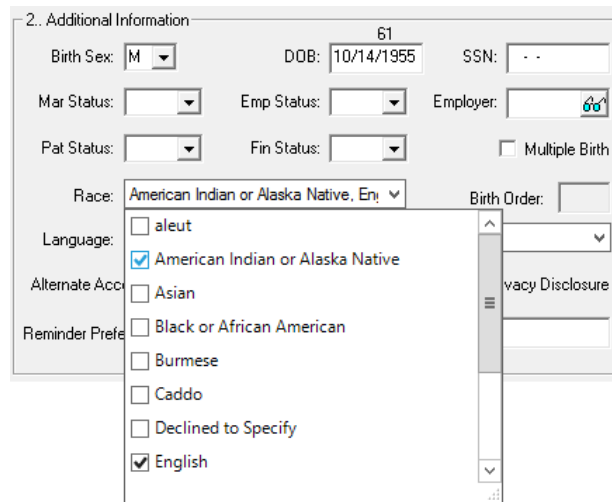
Figure 2 – Race Table Maintenance

Clinical

- Clinical – Immunization** – The program has been updated to include the Facility Site ID in the ORC.3 segment of the immunization file when sending immunization information to Philadelphia KIDS immunization registry.

Patient

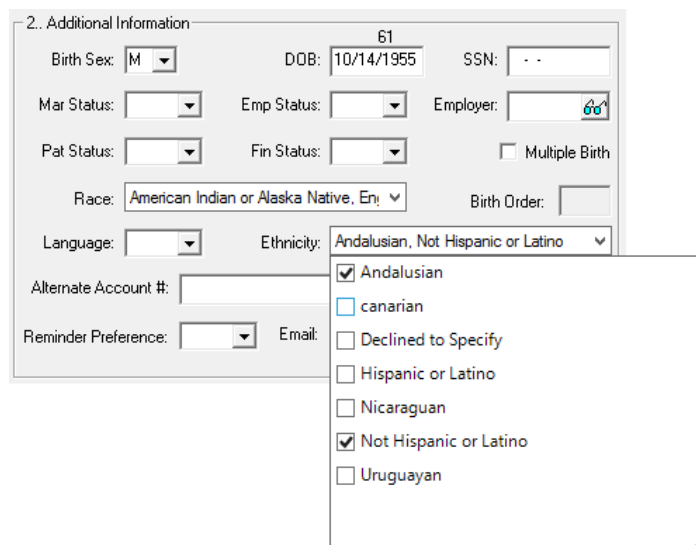
- **Patient – Additional Information** – The **Race** field, in the Additional Information section, has been updated to allow you to select multiple race options for a patient. See Figure 3.



The screenshot shows a form titled "2. Additional Information" for a patient with ID 61. The form includes fields for Birth Sex (M), DOB (10/14/1955), SSN, Mar Status, Emp Status, Employer, Pat Status, Fin Status, and Multiple Birth. The Race field is set to "American Indian or Alaska Native, En". A dropdown menu is open, showing the following options: aleut, American Indian or Alaska Native (checked), Asian, Black or African American, Burmese, Caddo, Declined to Specify, and English (checked). Other fields include Language, Alternate Account #, Reminder Preference, Birth Order, and Privacy Disclosure.

Figure 3 – Patient – Additional Information (Race)

- **Patient – Additional Information** – The **Ethnicity** field, in the Additional Information section, has been updated to allow you to select multiple ethnicity options for a patient. See Figure 4.



The screenshot shows the same form as Figure 3. The Ethnicity field is set to "Andalusian, Not Hispanic or Latino". A dropdown menu is open, showing the following options: Andalusian (checked), canarian, Declined to Specify, Hispanic or Latino, Nicaraguan, Not Hispanic or Latino (checked), and Uruguayan. Other fields include Language, Alternate Account #, Reminder Preference, Email, and Birth Order.

Figure 4 – Patient – Additional Information (Ethnicity)

Addendum

Insurance Billing Updates Reminder

In the version 4.1 release of Practice Manager, there was an important enhancement that was made to the Insurance Billing screen to alert you whenever a new insurance billing update is available. Once alerted you can then download these updated billing components at your convenience. **Do note that if you are running the 4.1 version of Practice Manager, the update process needs to be performed on the server.**

In the version 4.2 release of Practice Manager, the system was updated so that billing components reside on each individual workstation. **Therefore, if you are running the 4.2 version or higher of Practice Manager, the update process (described below) will need to be initiated for each workstation that will be doing insurance billing.** If the updates are not downloaded and registered on each workstation that will be doing insurance billing, then claims generated for those workstations may be denied if they are not updated.

- **Insurance Billing Updates** – The Insurance Billing tab has been updated with an Update button that allows you to download the latest insurance billing components if new components are available. See Figure A1. An Update button is available in both the Manual Billing and Automatic Billing sub-tabs and will become highlighted to alert you when new billing components are available.

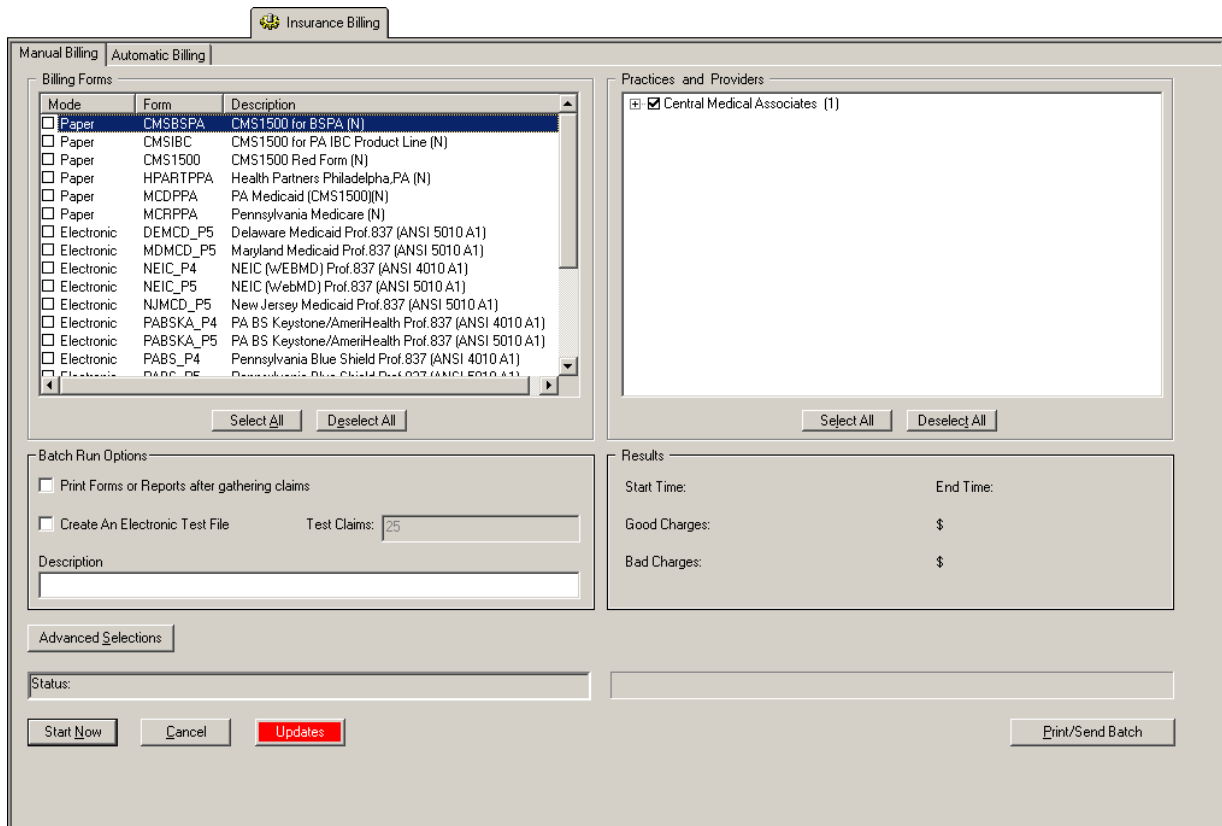


Figure A1 – Insurance Billing – Manual Billing

Once the download is initiated by clicking the **Updates** button, another dialog will appear confirming that you want to download and install the latest billing updates. See Figure A2.

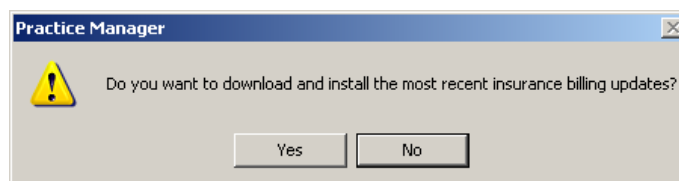


Figure A2 – Insurance Billing Updates Download

Insurance Billing Updates Reminder (continued)

Once the **Yes** button is clicked the insurance billing updates will start to download and the following message will appear in Figure A3. Do note that once the billing updates are initiated by a user, the Updates button will disable for all users and other users who try to initiate the download will receive a message stating that updates have started from another machine. Once the updates have been downloaded you will be prompted to install the updates, as well as to close out of the Practice Manager application to ensure a successful update.

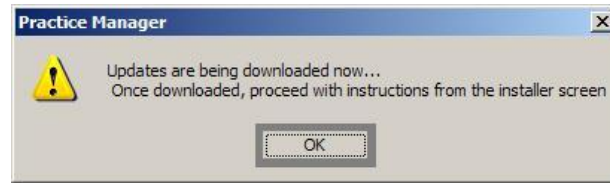


Figure A3— Insurance Billing Updates Download Confirmation

Once the updates have been successfully downloaded and installed, log back into Practice Manager and be sure to register the Billing Component Manger (Add-Ins > Insurance Billing > Billing Component Manager).

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