STI Computer Services, Inc. 2700 Van Buren Ave, Eagleville PA 19403 800-487-9135 Fax: 610-650-9272

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

- **Preferences — System Level Preferences – Patient–** The **Patient** tab of the Maintain System Default Preferences dialog has been updated with a **Default Birth Sex** field to provide consistency throughout the ChartMaker Medical Suite applications. See Figure 1. This field replaces the **Default Sex** field in previous versions of Practice Manager. When selecting a Default Birth Sex, you have the ability to select **Female**, **Male**, and **Unknown**.

- **Preferences — Practice Level Preferences – Patient–** The **Patient** tab of the Maintain Practice Preferences dialog has been updated with a **Default Birth Sex** field to provide consistency throughout the ChartMaker Medical Suite applications. See Figure 1. This field replaces the **Default Sex** field in previous versions of Practice Manager. When selecting a Default Birth Sex, you have the ability to select **Female**, **Male**, and **Unknown**.

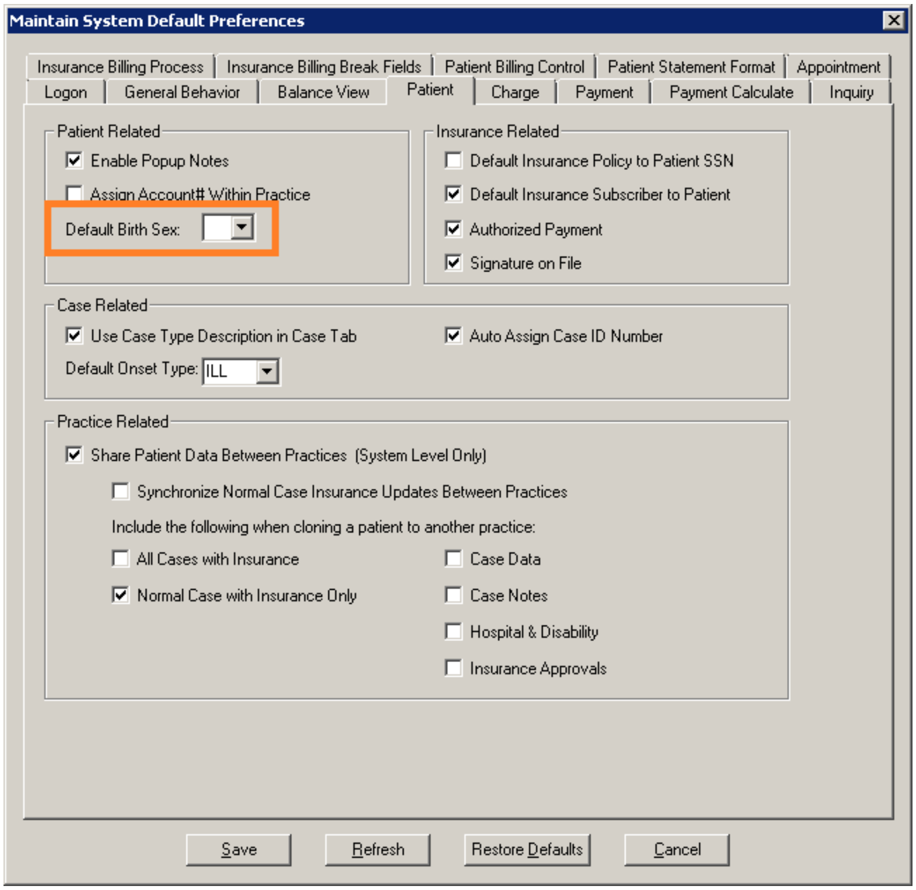

Figure 1 – Maintain System Default Preferences

Administration (continued)

- **Preferences — Screen Config – Patient–** The **Patient Screen Configuration** dialog has been updated with a **Birth Sex** field to provide consistency throughout the ChartMaker Medical Suite applications. See Figure 2. This field replaces the **Sex** field in previous versions of Practice Manager. When configuring a Default Value you can use **F** for Female, **M** for Male, and **U** for Unknown.

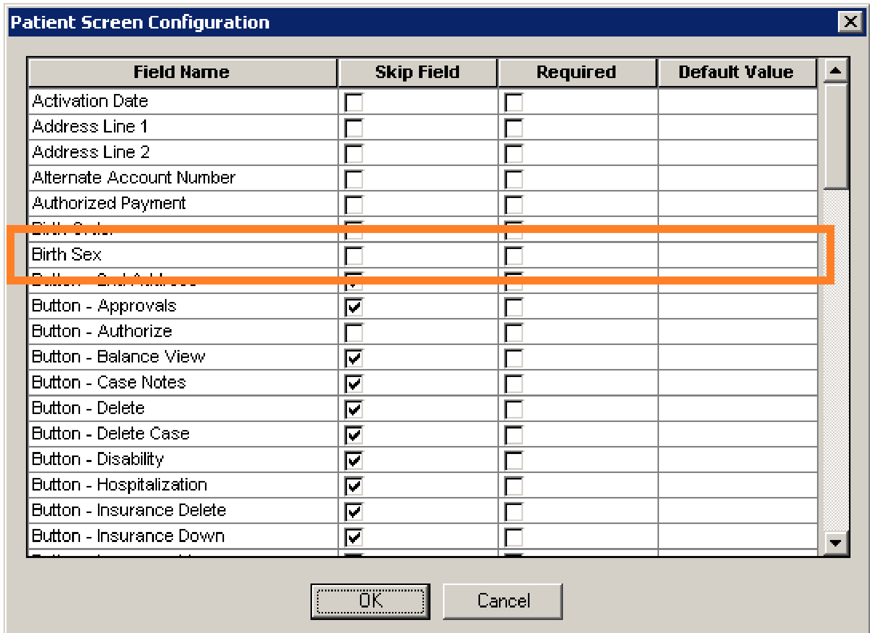

Figure 2 – Patient Screen Configuration

Appointment

- **Appointment – Select Patient – Additional Information –** The **Additional Information** section of the Select Patient tab has been updated with a **Birth Sex** field to provide consistency throughout the ChartMaker Medical Suite applications. See Figure 3. This field replaces the **Sex** field in previous versions of Practice Manager. When selecting a Birth Sex, you have the ability to select **Female**, **Male**, and **Unknown**. When adding a new patient, this field will default to Unknown unless a specific **Birth Sex** is configured in System/Practice Level Preferences (**Administration** > **Preferences** > **System Level Preferences**/**Practice Level Preferences** > **Patient** tab).

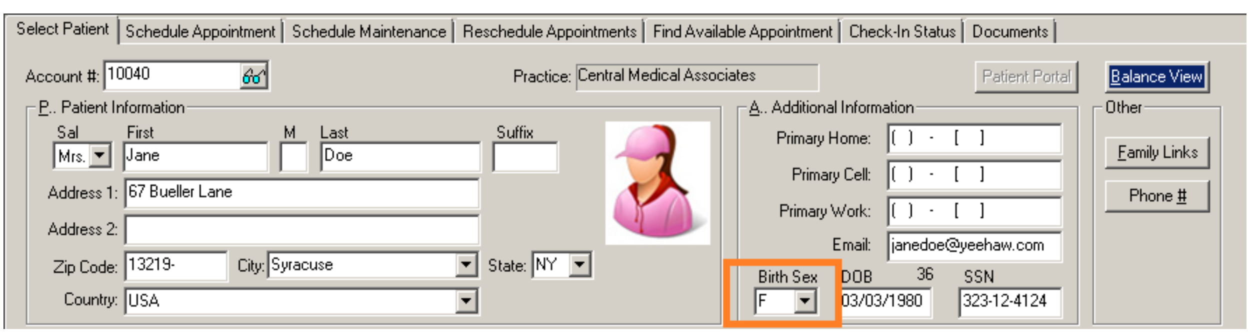

Figure 3 – Appointment — Select Patient

Appointment (continued)

- **Appointment – Schedule Appointment – Appointment Details –** The **Appointment Detail** dialog has been updated with a **Birth Sex** field to provide consistency throughout the ChartMaker Medical Suite applications. See Figure 4. This field replaces the **Sex** field in previous versions of Practice Manager. When selecting a Birth Sex, you have the ability to select **Female**, **Male**, and **Unknown**.

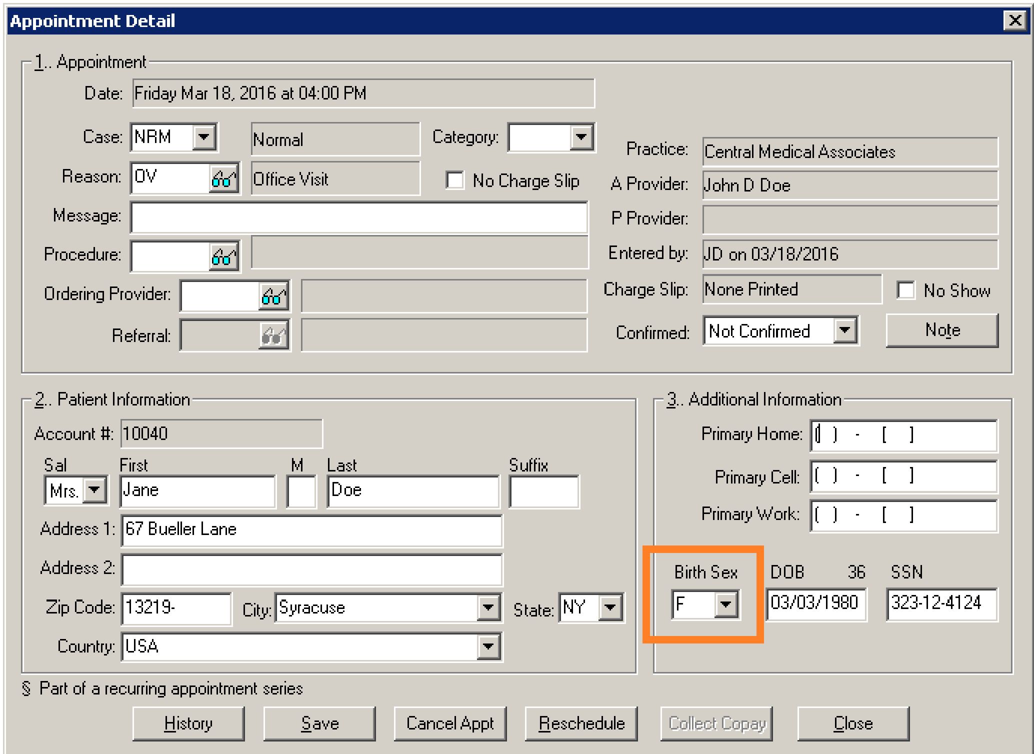

Figure 4 – Appointment — Schedule Appointment — Appointment Details

Patient

- **Patient – Additional Information –** The **Additional Information** section of the Patient tab has been updated with a **Birth Sex** field to provide consistency throughout the ChartMaker Medical Suite applications. See Figure 5. This field replaces the **Sex** field in previous versions of Practice Manager. When selecting a Birth Sex, you have the ability to select **Female**, **Male**, and **Unknown**. When adding a new patient, this field will default to Unknown unless a specific **Birth Sex** is configured in System/Practice Level Preferences (**Administration** > **Preferences** > **System Level Preferences/Practice Level Preferences** > **Patient** tab), or the Patient Screen Configuration area (**Administration** > **Preferences** > **Screen Config** > **Patient**).

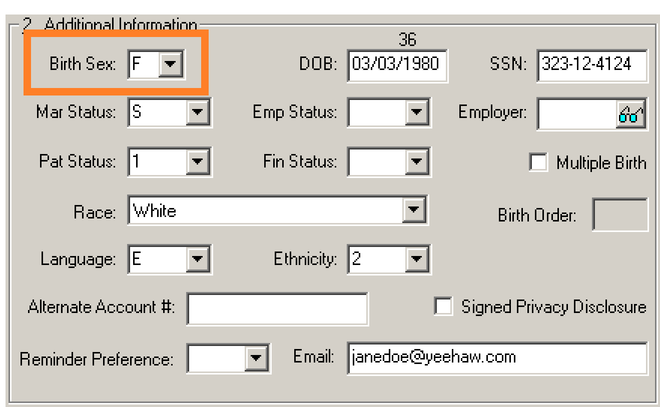

Figure 5 – Patient — Additional Information

Patient (continued)

- **Patient – Other — More Patient –** The **More Patient Information** dialog has been updated with a **Previous Last Name** field where you can view or configure any last name that the patient may have. See Figure 6. The new **Previous Last Name** field replaces the **Maiden Name** field in previous versions of Practice Manager. Information added or modified in the Previous Last Name field will be updated in the Audit Trail.

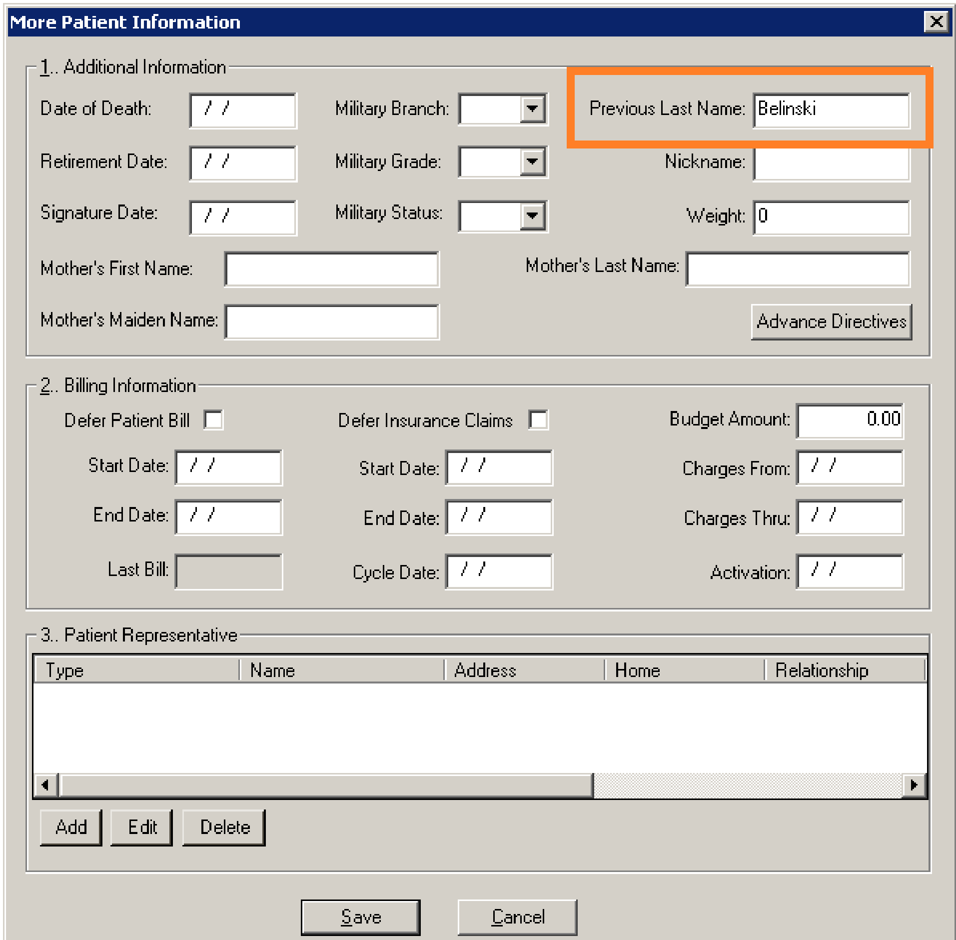

Figure 6 – Patient — More Patient Information

Reports

Managed Care Reports

- **Payment Analysis → Insurance Comparison Summary –** This report has been updated with new columns for **Allowed Amount**, **Allowed %Percentage**, **Payment Count.** Likewise, the **Units** column has been renamed to **Charge Units.** In addition an **Average Allowed** amount will display for each procedure, practice, and total.

Addendum

Medicare PQRS Incentive Program Reminder

In the version 3.3 release of Practice Manager, there were two important enhancements that were made that allow you to effectively flag applicable PQRS procedures to be sent to participating insurances to receive applicable incentive moneys through the Medicare PQRS (Physician Quality Reporting System) Incentive Program. These enhancements entailed creating a new Quality Measure field in the Procedure dialog and the Insurance dialog. Details of these changes from the Practice Manager 3.3 Release Notes document, along with some additional information about configuring G-Codes, are below. See the Practice Manager help for further details on the respective programs and additional configuration options utilizing the Clinical application.

- **Administration → Transaction Tables → Procedure** – The Procedure dialog has been updated with a Quality Measure checkbox that allows you to flag a procedure as a quality reporting measure for PQRS. See Figure A1. When a procedure is flagged as Quality Measure, the system will only bill charges for that procedure to insurances that are also flagged as Quality Measure. This ensures that the applicable PQRS procedures are only billed to participating insurances.

  To enter a PQRS procedure enter the applicable **Code** in the IH Code field. That code will then default into the CPT4 Code field. Next, in the Description field, enter an appropriate **Description**. In the Amount field, enter the **0.00**. In the TOS field, enter the applicable Type of Service, or search for it by clicking the Lookup button, or pressing F3. In the POS field, enter the applicable Place of Service, or search for it by clicking the Lookup button, or pressing F3. Check the **Quality Measure** option to flag this procedure as a quality reporting measure. When finished, click the **Save** button.

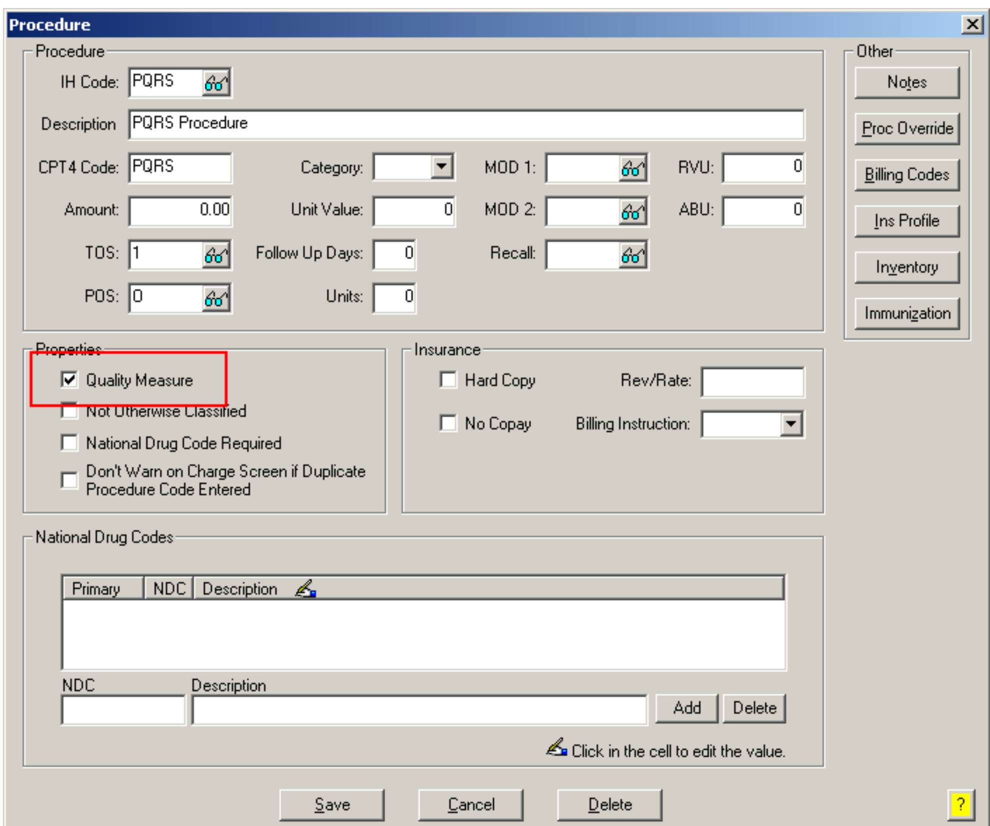

Figure A1 – Procedure

Medicare E-Prescription/PQRS Incentive Program Reminder (continued)

- **Administration → Transaction Tables → Insurance** – The Insurance dialog has been updated with a Quality Measure checkbox that allows you to flag an Insurance carrier as a quality reporting measure for PQRS. See Figure A2. When a procedure is flagged as Quality Measure, the system will only bill charges for that procedure to insurances that are also flagged as Quality Measure. This ensures that the applicable PQRS procedures are only billed to participating insurances.

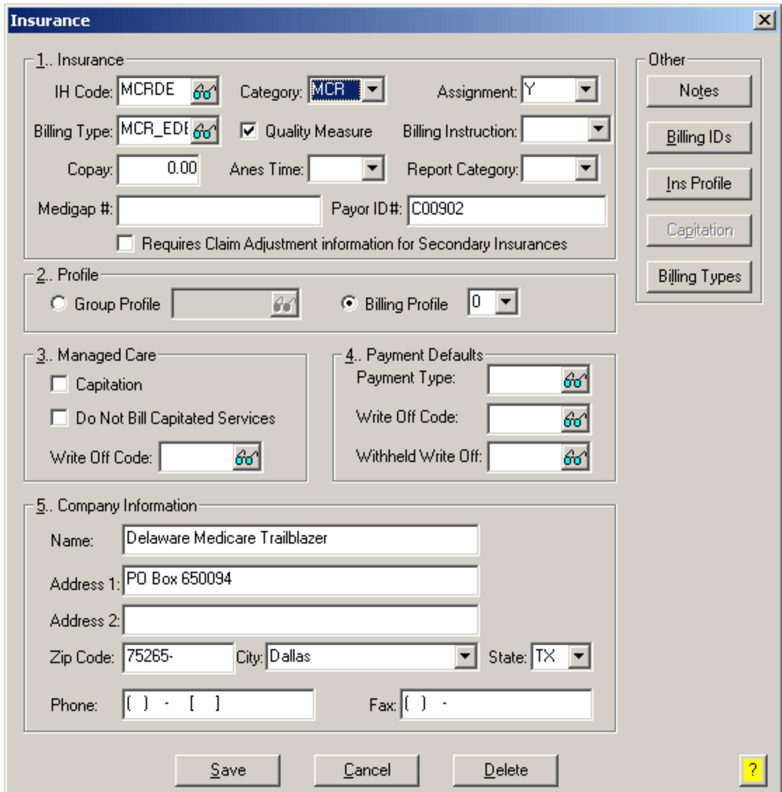

Figure A2 – Insurance Dialog

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 A3. 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.

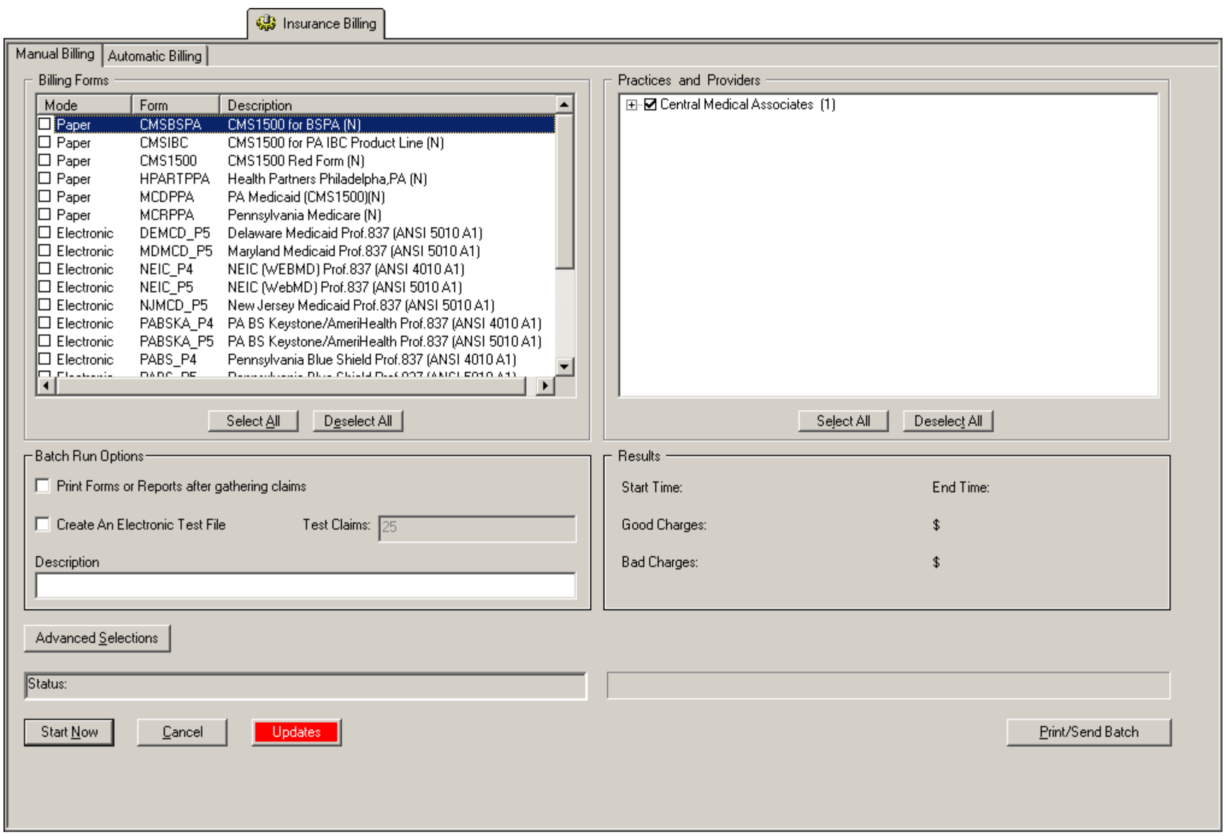

Figure A3 – Insurance Billing – Manual Billing

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 A4.

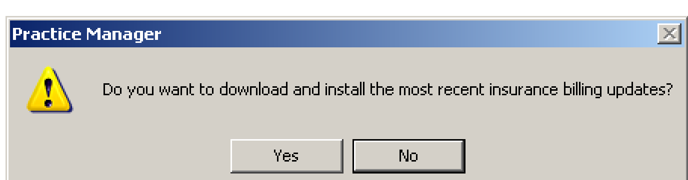

Figure A4 – Insurance Billing Updates Download

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 A5. 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.

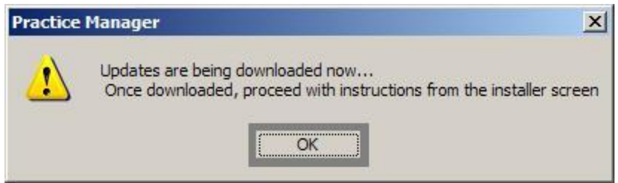

Figure A5 – Insurance Billing Updates Download Confirmation

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).