

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.

General

- **System Change – SNOMED Codes** – The system has been updated to use the latest (September 2016) version of the SNOMED-CT Codes and have been mapped to the applicable SNOMED categories used throughout the system.

Clinical

- **Clinical – Immunization** – The program has been updated so that the latest immunization codes from the CDC are being used when configuring immunization information.

Insurance Billing

- **Insurance Billing – Response Viewer** – The Response Viewer has been updated with the latest Remittance Advice Remark Codes and Claim Adjustment Reason Codes from CMS, allowing these codes to be displayed correctly when viewing EOBs in the Response Viewer, as well as when importing the files for the payment remittance module.

Patient

- **Patient – Other – More Patient** – The More Patient Information dialog has been updated with a **Previous First Name** field, and a **Previous Middle Name** field, where you can view or configure any previous first and/or middle name that the patient may have previously had. See Figure 1. Information added or modified in the Previous First, Middle, and Last Name fields will be updated in the Audit Trail. Likewise, whenever a previous first and last name is entered, the previous name information will be included in any Transition of Care (CCDA) documents exported from the system.
- **Patient – Other – More Patient** – The **Sexual Orientation** and **Gender Identity** sections of the More Patient Information dialog have been updated so that the various orientation and identity options match the SNOMED-CT code descriptions associated with those options. See Figure 1. Likewise, when you hover over these orientation and identity options with your mouse pointer, a tool tip pop-up will display the SNOMED code associated with that option.

Type	Name	Address	Home	Relationship
Emergency Contact Pri...	Rachel Doe	5621 Main Street...	(315) 488-1518	Significant Other

Figure 1 – Patient – More Patient Information

Reports

Managed Care Reports

- **Encounter Analysis → Summary** – This report has been updated with the ability to sort and select by **Case Close Date**, **Case Open Date**, and **Patient Status**.

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.

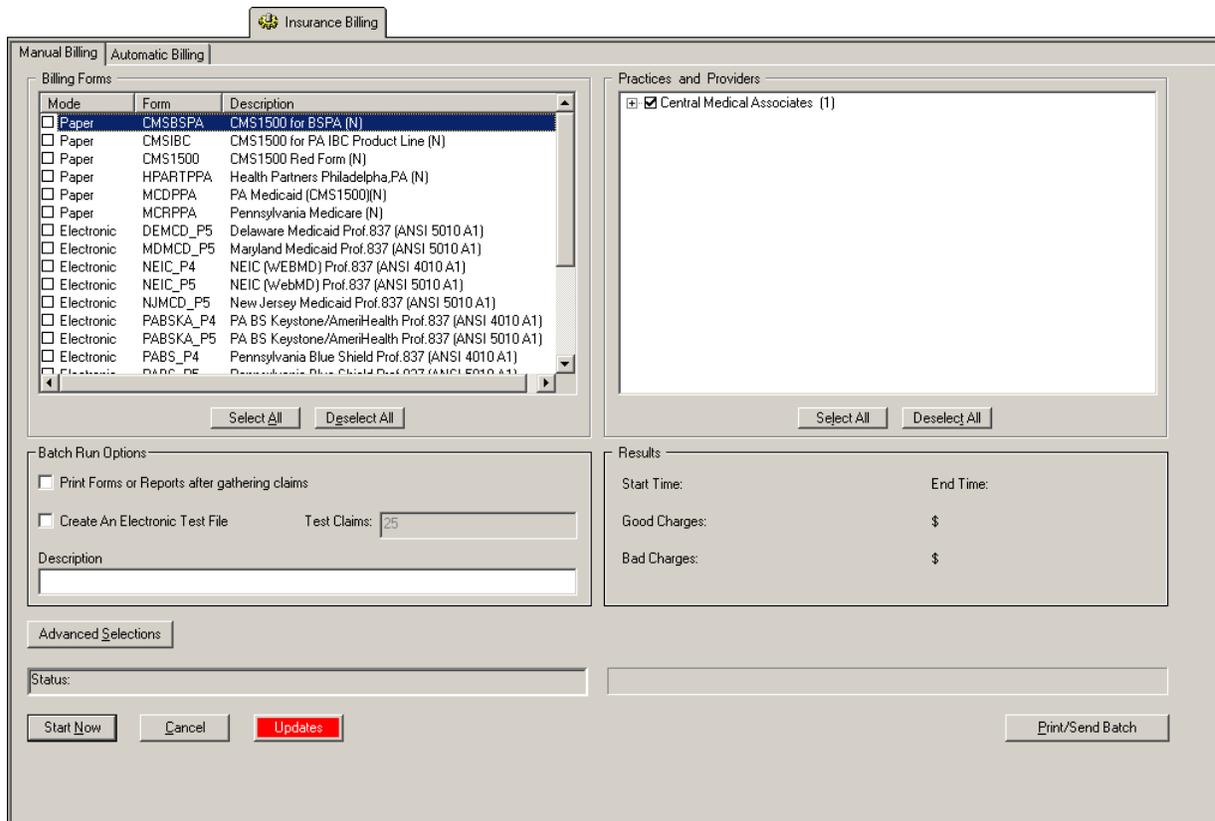


Figure A1 – Insurance Billing – Manual Billing

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.

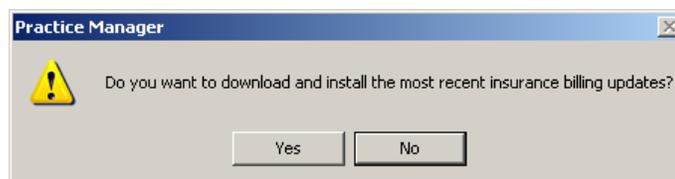


Figure A2 – Insurance Billing Updates Download

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.

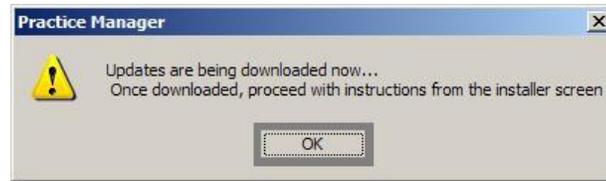


Figure A3— Insurance Billing Updates Download Confirmation

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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