



ChartMaker® Practice Manager Release Notes

ChartMaker® 2016 (fv6.2.3)

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 – Utilities – Audit – Audit Trail** – The Audit Trail has been updated to track when user privilege information is modified in PCADMIN. See Figure 1. When a user privilege event occurs the Event column will display **Modified**; the Group column will display **User**; the Audit Trail Description will display **Privilege changed: [Privilege Modified]**; the Old Value and New Value will contain the applicable privilege settings; and the **Practice ID** and **User Name** will be listed in the Metadata column.

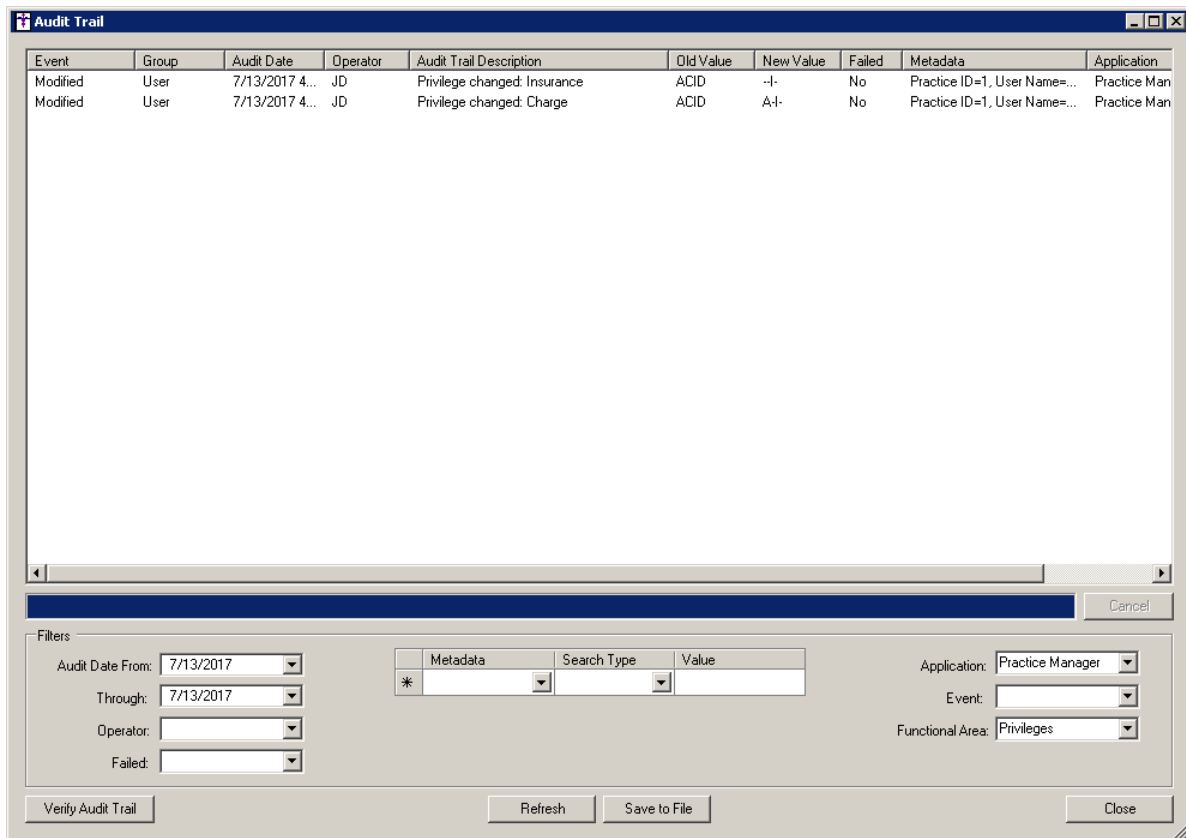


Figure 1 – Audit Trail

Clinical

- **Clinical – Immunization** – The program has been updated so that the latest immunization codes from the CDC are being used when configuring immunization information.
- **Clinical – Immunization – Immunization Registry** – The system has been updated to download and display immunization forecast information, if available, when downloading immunization history information from a registry via the Registry Records dialog (**Administration > Registries > Immunization > View Registry Records**). Any applicable immunization forecast information will be displayed after the immunization history 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 (July 2017), 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 Additional Information section of the More Patient Information dialog has been updated with a Patient County button that allows you to access the Patient County dialog to configure the county in which the patient resides. See Figure 2 and 3.

More Patient Information

1. Additional Information

Date of Death: // Military Branch: Previous First Name:

Retirement Date: // Military Grade: Previous Middle Name:

Signature Date: // Military Status: Previous Last Name: Belinski

Mother's First Name: Nickname:

Mother's Last Name: Weight: 0

Mother's Maiden Name:

2. Billing Information

Defer Patient Bill Defer Insurance Claims Budget Amount: 0.00

Start Date: // Start Date: // Charges From: //

End Date: // End Date: // Charges Thru: //

Last Bill: Cycle Date: // Activation: //

3. Patient Representative

Type	Name	Address	Home	Relationship

4. Sexual Orientation

Do you think of yourself as: (Check one.)

Lesbian, gay or homosexual

Straight or heterosexual

Bisexual

Something else, please describe

Don't know

Choose not to disclose

5. Gender Identity

What is your current gender identity? (Check all that apply.)

Identifies as Male

Identifies as Female

Female-to-Male (FTM)/Transgender Male/Trans Man

Male-to-Female (MTF)/Transgender Female/Trans Woman

Genderqueer, neither exclusively male nor female

Additional gender category or other, please specify

Choose not to disclose

Figure 2 – Patient – More Patient Information

After the Patient County dialog has been accessed, the state will be auto-filled, in the Filter by State field, based on the state entered in the main Patient screen. You can then select the County from the list of counties for that state in the corresponding field.

Patient County

Select County

Filter by State: NY

County: Onondaga, NY

Figure 3 – Patient – More Patient Information – Patient County

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.

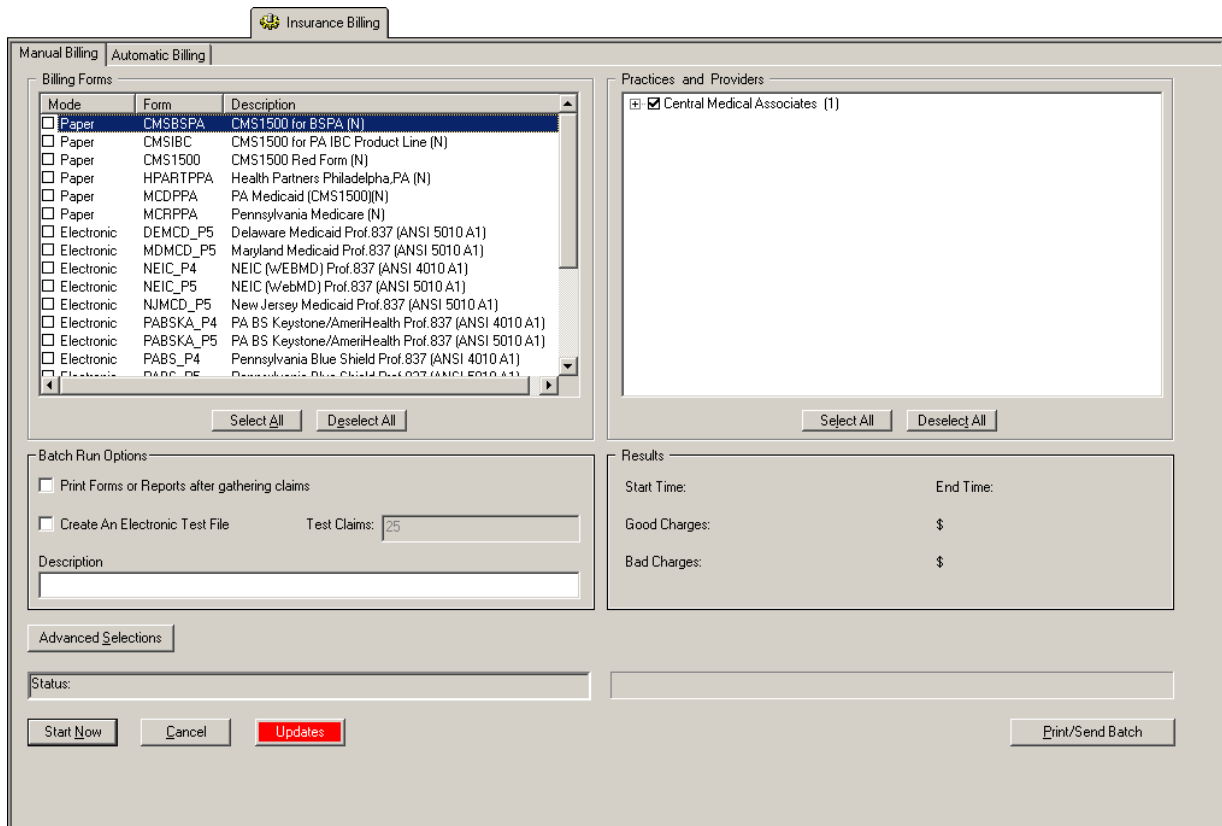


Figure A1 – Insurance Billing – Manual Billing

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.

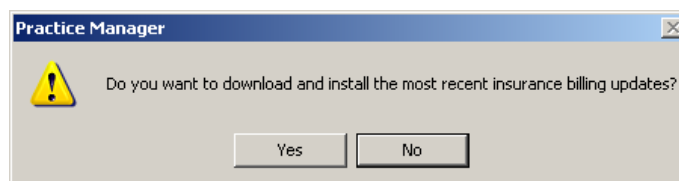


Figure A2 – Insurance Billing Updates Download

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.

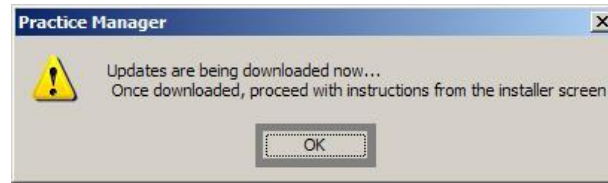


Figure A3— Insurance Billing Updates Download Confirmation

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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