



# ChartMaker® Practice Manager Release Notes

ChartMaker® 2016 (fv6.2.4)

\*\*\*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 – Diagnosis Search** – The **ICD10 Code Set** field, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with an **October 1, 2017 – Sept 30, 2018** code set when searching for diagnosis codes or using the crosswalk functionality. You can toggle between the Oct 1, 2014 – Sept 30 2016 code set, the Oct 1, 2016 – Sept 30 2017 code set, and All ICD10 Codes, in addition to this new code set. This allows you to easily search for the applicable ICD10 codes that are active, as outlined by the CDC, for the applicable date ranges. When accessing the Diagnosis Search dialog via the **Administration** menu, the system will default to the code set based on the current day's date.
- **Administration – Mobile – Mobile Administration** – The **Audit** tab, in the Mobile Administration dialog, has been updated to track to when a new patient is created in ChartMaker® Mobile (requires ChartMaker® Mobile version 6.2.4 due to be released 09/15/2017). See Figure 1. When a new patient audit event occurs, the Activity Type column will display **New Patient**, and the Additional Info column will display the patient's **Date of Birth** and **Practice** to which the patient was added.

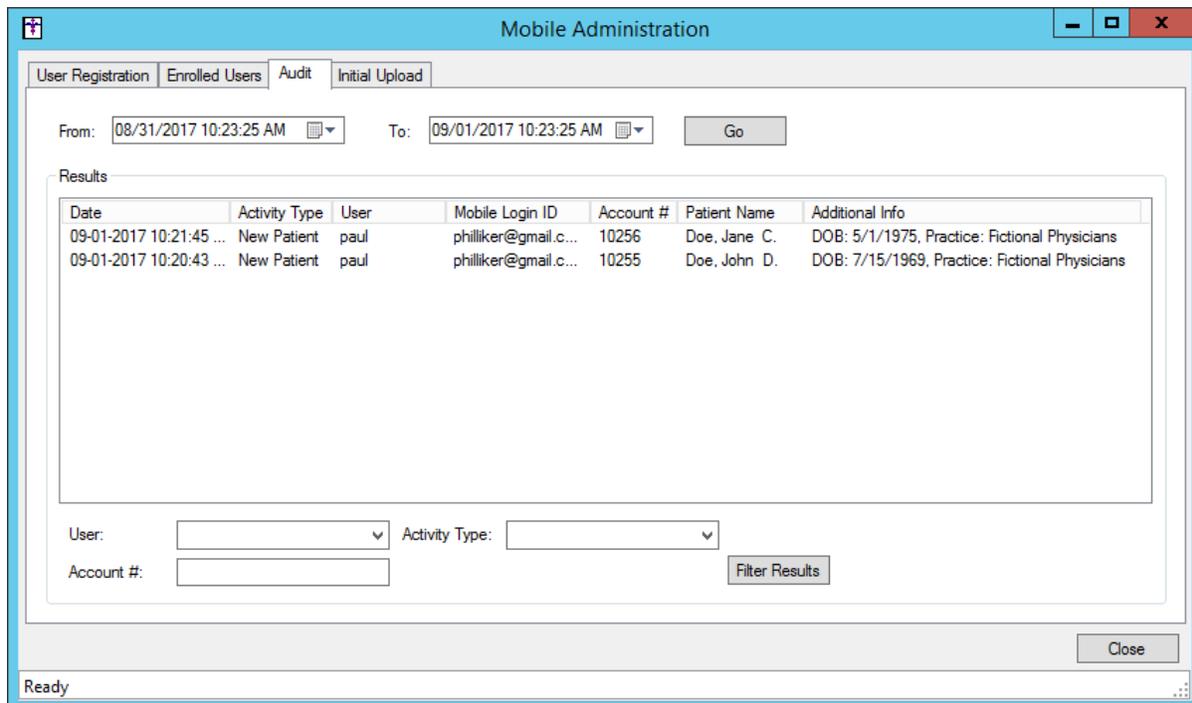


Figure 1 – Mobile Administration – Audit

## Administration (continued)

- **Administration – Mobile – New Patients – A New Patients From ChartMaker® Mobile** dialog has been created to easily view all patients that were created in ChartMaker® Mobile (requires ChartMaker® Mobile version 6.2.4 due to be released 09/15/2017). See Figure 2. When new patients are added through the mobile app, they are given a status of NPI (New Patient Incomplete Information), and need to be activated in Practice Manager prior to processing any pending charges. Patients will remain listed in this dialog until their status has been updated in Practice Manager.

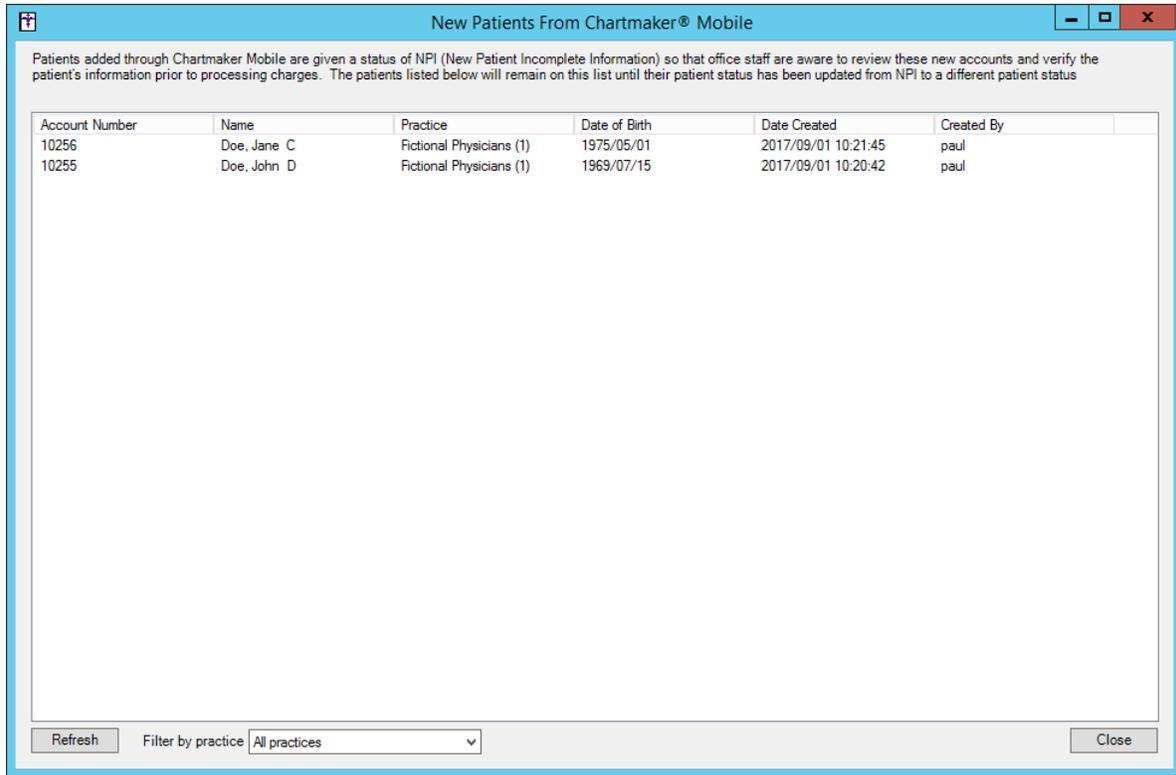


Figure 2 – New Patients From ChartMaker® Mobile

- **Administration – Utilities – Audit – Audit Trail** – The Audit Trail has been updated to track when a new patient is added in ChartMaker® Mobile (requires ChartMaker® Mobile version 6.2.4 due to be released 09/15/2017). When a new patient audit event occurs, the Event column will display **Added**; the Group column will display **Person**; the Audit Trail Description will display **Status**; and the patient's **Account #**, **Practice**, and **Mobile Username** (in comments) will be listed in the Metadata column.

## Charge

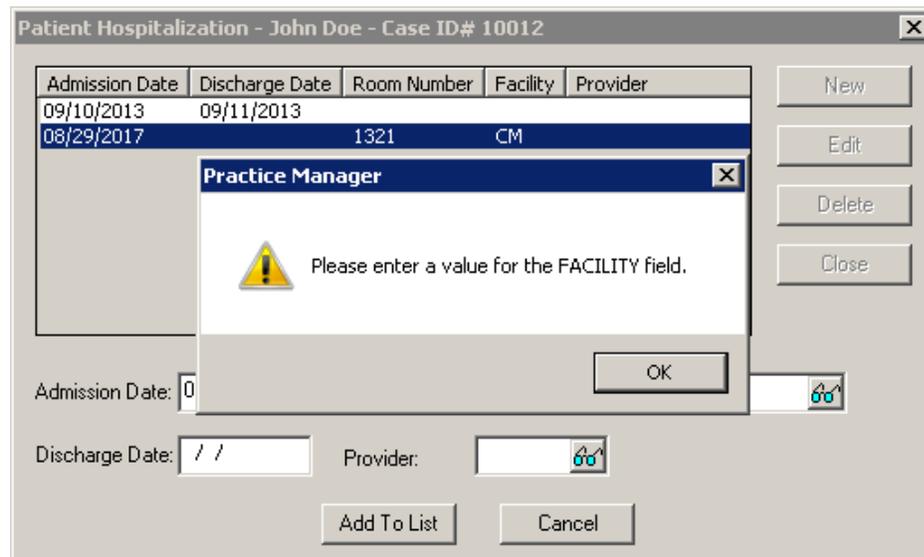
- **Charge – Enter a Charge** – The **ICD10 Code Set** field, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with an **October 1, 2017 – Sept 30, 2018** code set when searching for diagnosis codes or using the crosswalk functionality. You can toggle between the Oct 1, 2014 – Sept 30 2016 code set, the Oct 1, 2016 – Sept 30 2017 code set, and All ICD10 Codes, in addition to this new code set. This allows you to easily search for the applicable ICD10 codes that are active, as outlined by the CDC, for the applicable date ranges. When accessing the Diagnosis Search dialog when entering charges, the system will default to the code set based on the service **Start Date** to ensure that the proper ICD codes for that date are selected.
- **Charge – Edit a Charge** – The **ICD10 Code Set** field, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with an **October 1, 2017 – Sept 30, 2018** code set when searching for diagnosis codes or using the crosswalk functionality. You can toggle between the Oct 1, 2014 – Sept 30 2016 code set, the Oct 1, 2016 – Sept 30 2017 code set, and All ICD10 Codes, in addition to this new code set. This allows you to easily search for the applicable ICD10 codes that are active, as outlined by the CDC, for the applicable date ranges. When accessing the Diagnosis Search dialog when editing charges, the system will default to the code set based on the service **Start Date** to ensure that the proper ICD codes for that date are selected.

## Clinical

- **Clinical – Immunization** – The program has been updated to ensure that the latest CVX codes and CVX mappings, per the latest CDC guidelines, are used for immunization procedures.

## Patient

- **Patient – Case – Diagnosis** – The **ICD10 Code Set** field, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with an **October 1, 2017 – Sept 30, 2018** code set when searching for diagnosis codes or using the crosswalk functionality. You can toggle between the Oct 1, 2014 – Sept 30 2016 code set, the Oct 1, 2016 – Sept 30 2017 code set, and All ICD10 Codes, in addition to this new code set. This allows you to easily search for the applicable ICD10 codes that are active, as outlined by the CDC, for the applicable date ranges. When accessing the Diagnosis Search dialog when entering or editing patient information, the system will default to the code set based on the current day's date.
- **Patient – Case – Hospitalization** – The Patient Hospitalization dialog has been updated so that when adding or editing hospitalization information, the **Facility** for the hospitalization record is required. When adding or editing a hospitalization record for the patient, if a facility is not entered and you click the **Add to List** button, a warning message will appear prompting you to enter a facility. See Figure 3. You will not be able to add or update the hospitalization record until the facility is entered.



**Figure 3 – Patient Hospitalization – Facility Warning**

# 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.

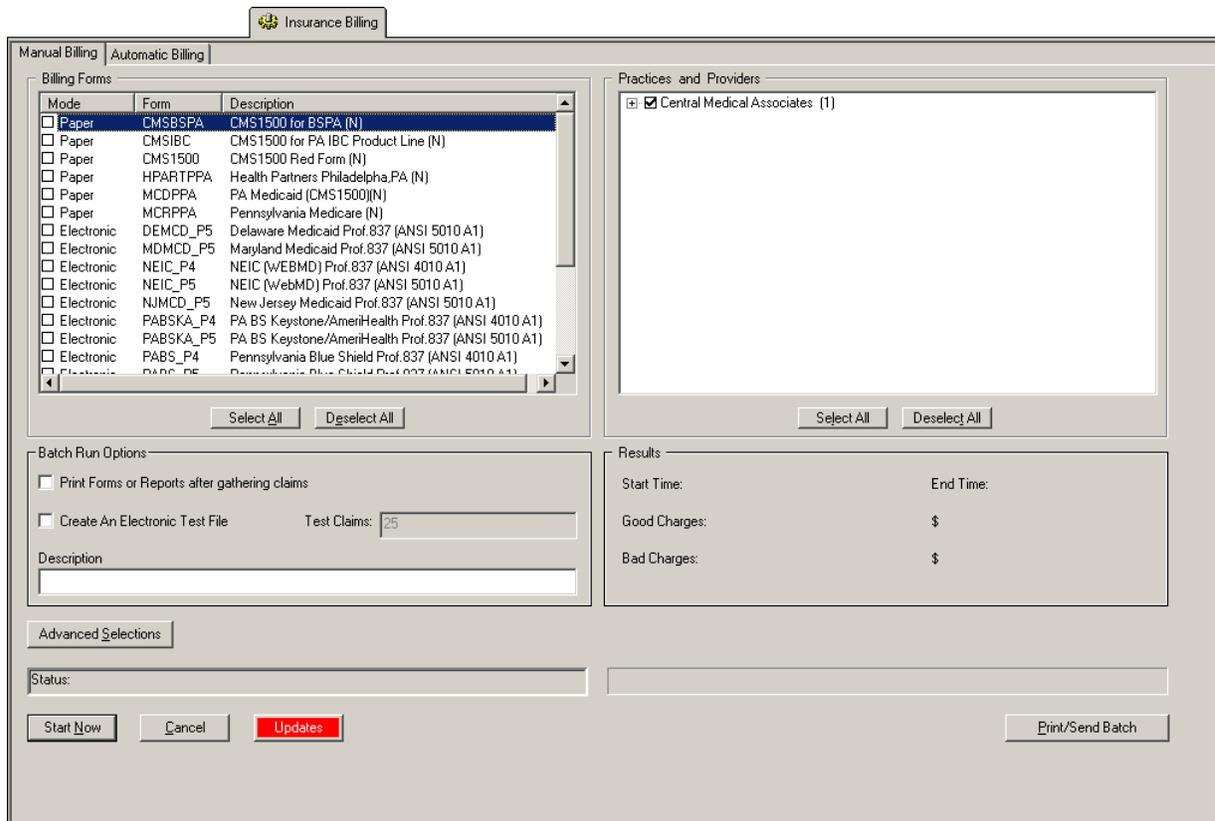


Figure A1 – Insurance Billing – Manual Billing

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.

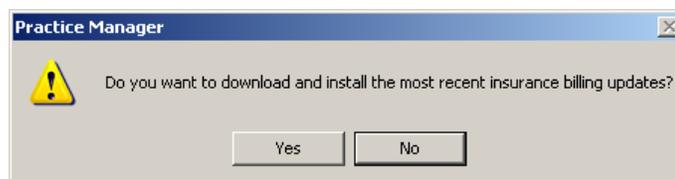
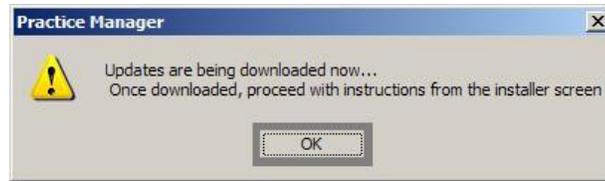


Figure A2 – Insurance Billing Updates Download

## 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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