



# ChartMaker® Practice Manager Release Notes

ChartMaker® 2018 (fv6.3.1)

## Appointment

- Appointment – Schedule Appointment – Appointment Details** – The Appointment Details dialog (accessed either by double-clicking the applicable appointment in schedule grid in the Schedule Appointment screen, or by right-clicking the system the applicable appointment in schedule grid in the Schedule Appointment screen, and then clicking **Detail** in the menu), has been updated with a **Balance View** button. See Figure 1. The Balance View button allows access to the Balance View dialog that provides outstanding financial information for the patient based on how the **Balance View Preferences** are configured, like the Balance View buttons in the Appointment > Select Patient and Patient screens.

**Appointment Detail**

1.. Appointment  
 Date: Wednesday Jul 11, 2018 at 04:00 PM Balance View  
 Case: NRM Normal Category:   
 Reason: SICK  
 Message:   
 Procedure:   
 Ordering Provider:   
 Referral:   
 2.. Patient Information  
 Account #: 10012  
 Sal: John  
 Address 1: 238 Mail  
 Address 2:   
 Zip Code: 13219 City: Syracuse State: NY M 04/10/1990 212-32-1312  
 Country: USA

**Balance View**  
 Responsible Party: <Patient> Detail   
 Practice: Central Medical Associates  
 Account #: 10012  
 Name: John Doe  
 Age: 28  
 Next Appt:   

	Today	Total
Ins	0.00	1650.00
Pat	0.00	405.00
Total	0.00	2055.00
Total Credits		-45.00
Collections:		0.00

	Not Billed	0 - 30	31 - 60	61 - 90	91 - 120	Over 120	Total
Pat Due	405.00	0.00	0.00	0.00	0.00	0.00	405.00
Ins Due	865.00	0.00	0.00	0.00	0.00	785.00	1650.00
Total	1270.00	0.00	0.00	0.00	0.00	785.00	2055.00

 Total Balance: 2055.00 Last Visit: 05/22/2017 Last Pat Paid: 10.00  
 Total Credits: -45.00 Last Bill: 03/04/2016 Last Pat Paid Date: 12/27/2016  
 Net Balance: 2010.00 Finance Amount: 0.00 Last Ins Paid: 85.00  
 Collections: 0.00 Budget Amount: Budget Due: 0.00 Last Ins Paid Date: 12/22/2016  
 Unpaid Copay: 40.00

§ Part of a recurring appointment series

History Save Cancel Appt Reschedule Collect Copay Close

Figure 1 – Appointment – Schedule Appointment – Appointment Details

## Clinical

- **Clinical – Immunization – Immunization Registry – MDIIS** – The system has been updated so that the Maryland (Immunet) Immunization Information System (MDIIS), in conjunction with the ChartMarker® Medical Suite, utilizes 2.5.1 HL7 bidirectional messaging and exchange of vaccine (immunization) information. Once the system is set up, and you are enrolled with MDIIS, immunization records will be automatically sent to the MDIIS when the immunization record is saved (via the **Next Account** button) in the Immunization sub-tab of Clinical tab in Practice Manager, or when a chart note is saved or closed in the Clinical application.

## Insurance

- **Insurance Billing – SPARCS** – The program has been updated so that when creating a new file for SPARCS, the **Output Path and Filename** field will default to the file path of [\\server\communications\upload\SPARCS](#), and will also contain a browse button which allows you to browse to another file location, if needed.

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