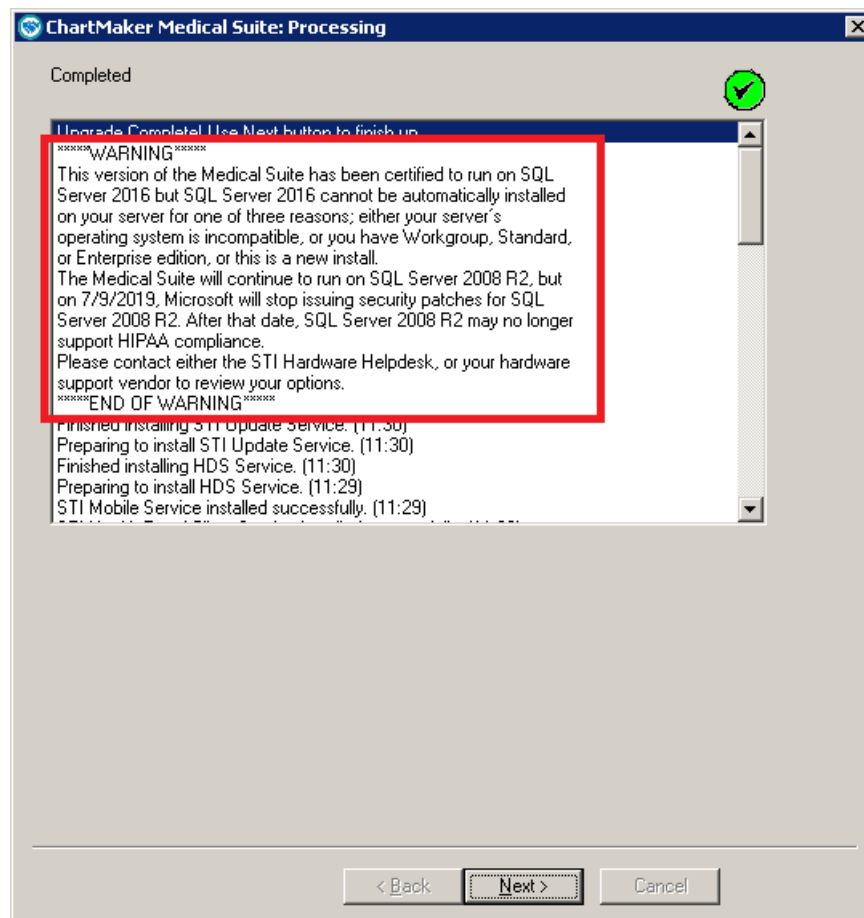


## ChartMaker® Practice Manager Release Notes

### ChartMaker® 2018.2 (July 2019 Release)

#### Important Notifications

- **Upgrade from Microsoft Server 2008 and Windows 7** – In January 2020, your Windows 7 workstations and Microsoft 2008 Servers will no longer be supported. Even with security patches, problems may still arise if you choose not to upgrade. In addition, your workstations will no longer be HIPAA compliant. To avoid potential issues in the future, contact our [Technical Services Department](#) today.
- **SQL Server 2016 & the ChartMaker 2018.2 (September 2018 Release) Upgrade** – Beginning with ChartMaker 2018.2 (File Version 6.3.3) Upgrade, a warning message will appear upon the completion of the upgrade regarding the transition of the ChartMaker Medical Suite to using SQL Server 2016, for those offices where an automated upgrade to SQL Server 2016 was not possible. See the figure below. If you are receiving this message, to avoid potential issues and to ensure your system remains HIPAA compliant, it is important to contact either STI Hardware Helpdesk, or your software vendor, to review your options.



ChartMaker Medical Suite SQL Server 2016 Warning

## Administration

- **Administration – Utilities – Audit – Audit Trail\*** – The Audit Trail has been updated to track whenever a patient with temporary account number (NEW####) is activated in the system and updated to a regular account number in the Activate New User Account dialog. When an audit event occurs, the Event column will display **Modify**; the Group column will display **Patient**; the Audit Trail Description will display the **Temporary Account number changed – system assigned** (if the system assigns the account number option is selected in the Activate New User Account dialog), or **Temporary Account number changed – user assigned** (if the user assigned the account number in the Activate New User Account dialog); the Old Value column will contain the **[Temporary Account Number]**; the New Value column will contain **[The Activated Account Number]**; and the user's **Login ID** will be listed in the Metadata column.
- **Administration – Utilities – Audit – Audit Trail\*** – The Audit Trail has been updated to track the answer that a user gives when presented with a message indicating that the patient demographic information has been modified by other users. See Figure 1. When an audit event occurs, the Event column will display **Modify**; the Group column will display **Patient**; the Audit Trail Description will display **Patient demographics have been modified warning message**; and the patient's **Account ID** and the **Comments: User chose Yes/No** will be listed in the Metadata column.

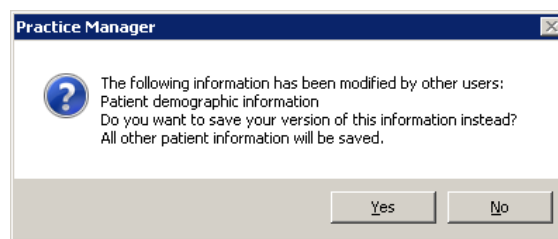


Figure 1 – Practice Manager – Demographic Change Warning

- **Administration – Utilities – Audit – Audit Trail\*** – The Audit Trail has been updated to track whenever a patient is enabled for PatientPortal via the Patient Access dialog. When an audit event occurs, the Event column will display **Authorize**; the Group column will display **Patient**; the Audit Trail Description will display **Patient authorization instructions are now being printed to access the PatientPortal** or **Patient authorization email for PatientPortal access sent to [email address]**; and the patient's **Account ID** will be listed in the Metadata column.
- **Administration – Utilities – Audit – Audit Trail\*** – The Audit Trail has been updated to track whenever a patient is enabled for API Access via the Patient Access dialog. When an audit event occurs, the Event column will display **Authorize**; the Group column will display **Patient**; the Audit Trail Description will display **Patient authorization instructions are now being printed to access the API**, or **Patient authorization email for API access sent to [email address]**, or **Patient was authorized for API access pending printing or emailing instructions**; and the patient's **Account ID** will be listed in the Metadata column.
- **Administration – Utilities – Audit – Audit Trail\*** – The Audit Trail has been updated to track whenever API Access is disabled for a patient via the Patient Access dialog (**Chart > API Access**). When an audit event occurs, the Event column will display **Authorize**; the Group column will display **Patient**; the Audit Trail Description will display **API access was disabled for this patient**; and the patient's **Account ID** will be listed in the Metadata column.
- **Administration – Utilities – Audit – Audit Trail\*** – The Audit Trail has been updated to track whenever document export is suspended for a patient (checking the **Do not export on note, lab, and scan signing** option in the Patient Access dialog). When an audit event occurs, the Event column will display **Authorize**; the Group column will display **Patient**; the Audit Trail Description will display **Suspend document export to API and PatientPortal**; and the patient's **Account ID** will be listed in the Metadata column.
- **Administration – Utilities – Audit – Audit Trail\*** – The Audit Trail has been updated to track whenever document export is reinstated for a patient (unchecking the **Do not export on note, lab, and scan signing** option in the Patient Access dialog). When an audit event occurs, the Event column will display **Authorize**; the Group column will display **Patient**; the Audit Trail Description will display **Document export has been enabled to API and PatientPortal**; and the patient's **Account ID** will be listed in the Metadata column.

## Administration (continued)

- **Administration – Utilities – Audit – Audit Trail\*** – The Audit Trail has been updated to track whenever a patient is suspended for the PatientPortal by the practice via the Practice Admin area of the PatientPortal. When an audit event occurs, the Event column will display **Authorize**; the Group column will display **Patient**; the Audit Trail Description will display **PatientPortal access was disabled for this patient**; and the patient's **Account ID** will be listed in the Metadata column.

## Appointment

- **Appointment – Select Patient – Patient Access\*** – The Patient Access dialog has been updated so that **PatientPortal** is designated correctly and consistently throughout the dialog. See Figure 2. Anywhere the text has deviated from the proper designation has been updated to **PatientPortal**.
- **Appointment – Select Patient – Patient Access\*** – The Patient Access dialog has been updated so that whenever you **Authorize** the patient for PatientPortal, the system will automatically check the **Enable this patient for API access** option and generate an Authentication code, thereby also enabling them for API access in a single click. See Figure 2. Likewise, if the Authorize button associated with the **Send an authorization...** option was selected, the system will automatically check the **Send an email to this patient with their authentication code.** option for API; if the Authorize button associated with the **Print authorization instructions...** option was selected, the system will automatically check the **Print this patient's authentication code.** option for API; and if both Authorize buttons are selected, both API options will automatically be checked. In addition, the **Cancel** button, and cancellation functionality, has been removed from the Patient Access dialog, leaving **OK** as the only functional response to exiting the dialog.

The screenshot shows a 'Patient Access' dialog box with the following content:

- PatientPortal account settings**
  - Registration status:
  - Send an authorization email to the patient for PatientPortal registration. [Authorize]
  - or
  - Print authorization instructions for the patient to manually register on the PatientPortal. [Authorize]
- API Access**
  - Enable this patient for API access
  - Authentication code: N/A
  - Print this patient's authentication code.
  - Send an email to this patient with their authentication code.
  - Generate a new authentication code for this patient. [Generate]
- Do not export on note, lab and scan signing
- Status Legend**
  - - PatientPortal and API are not enabled
  - - PatientPortal enabled and API is not enabled or PatientPortal not enabled and API is enabled
  - - PatientPortal pending and API not enabled
  - - PatientPortal is pending and API is enabled
  - - PatientPortal and API are enabled
  - - PatientPortal and API have note data not being sent (suspended)
- [Help] [OK]

Figure 2 – Patient Access

# Clinical

- **Clinical – Immunization – Immunization Registry – Configuration – NYSIIS** – The Registry Configuration dialog has been updated so that when the NYSIIS v 2.5.1 v1.5 format is selected, the Bi-directional Credentials section will be disabled and grayed out, since those credentials are no longer needed to send and receive bi-directional immunization information for NYSIIS. See Figure 3.

Registry Configuration

Registry Format: NYSIIS v 2.5.1 v1.5 \* Supports bi-directional functionality.

Office Location and Site ID

Enter the Site ID, provided by the immunization registry, for the office location it's assigned to.

Please indicate one Default Site ID

Office Location	Site ID	Inventory ID	Default
STI Medical Practice (STI)	4321		<input checked="" type="checkbox"/>

Office Location:  Site ID:  Inventory ID:  Add Delete

Bi-directional Credentials

Practice	User ID	Password
----------	---------	----------

Practice:  User ID:  Password:  Add Delete

Instructions for Sending Immunizations

Send to registry environment:  Production  Test

Do not send immunizations with a service date prior to: 7/ 9/2019

Send historical immunizations

Save Cancel

Figure 3 – Registry Configuration – NYSIIS

# Insurance

- **Insurance Billing – No Fault Claims** – The system has been updated to send No Fault claims electronically through Change HealthCare. Several changes have been made to the Practice Manager system to allow you to successfully send No Fault Claims electronically. These changes will be outlined below. After the necessary information has been configured, No Fault claims will be collected in the normal billing process to Change Healthcare.

Insurance – A new insurance Category of **No Fault** has been created. See Figure 4. The No Fault category needs to be selected for all No-Fault insurances. The rest of the insurance information should be configured in a manner similar to how other insurances to be sent electronically to Change Healthcare (e.g., a Billing Type that uses the NEIC\_P5 billing form, a Payer ID #, etc.) are configured.

The screenshot shows the 'Insurance' configuration window. The 'Category' dropdown is open, showing 'NF No Fault' selected. The 'Billing Type' is 'NEIC'. The 'Payor ID #' is '00432'. The 'Company Information' section shows 'MVP' as the name and '5445 South Genesee' as the address. The 'Billing Profile' is set to '0'. The 'Payment Defaults' section has 'Payment Type', 'Write Off Code', and 'Withheld Write Off' fields. The 'Managed Care' section has 'Capitation' and 'Do Not Bill Capitated Services' checkboxes. The 'Company Information' section has fields for Name, Address 1, Address 2, Zip Code, City, State, Country, Phone, and Fax.

Figure 4 – Insurance

## Insurance (continued)

### Insurance Billing – No Fault Claims (continued)

Charge Custom Fields – When entering, or editing, charges, you need to click the **Custom** button to access Charge Custom Fields dialog where a **Document Indicator** and **Attachment Control Number** needs to be configured for the charges.

The **Document Indicator** can be selected in the fields in the Billing Instruction Codes section of the Charge Custom Fields dialog. See Figure 5. If a document indicator is not configured for No Fault charges, those charges will not be sent and will appear on the Bad Claims report. Do note, that if DI09 Document Indicator – No Documentation option is selected, the charges also will not be sent and will appear on the Bad Claims report.

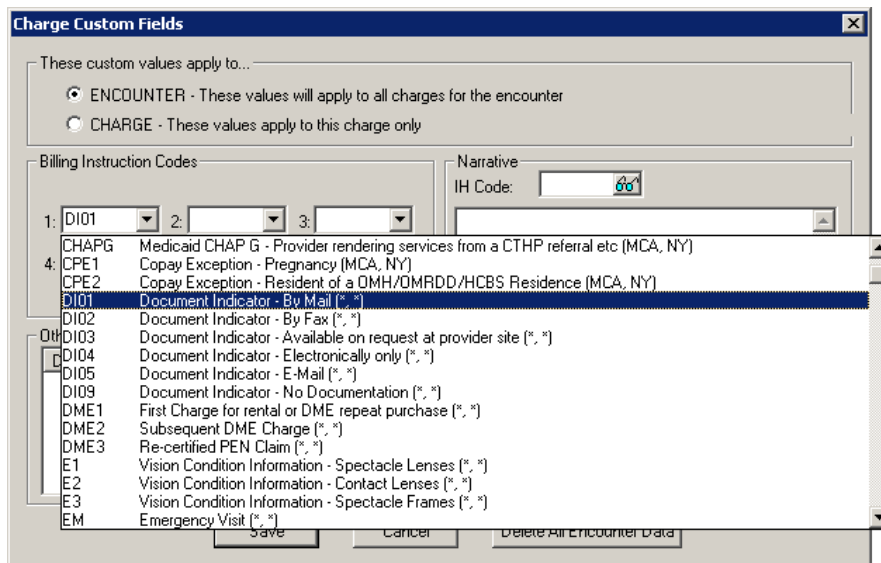


Figure 5 – Charge Custom Fields – Billing Instruction Codes – Document Indicator

The **Attachment Control Number** is entered by clicking the **Add** button in the Other section. Then, in the Add Extended Data dialog, select **Text** for the Type, **Attachment Control Number-HIPAA Prof (20002)** for the Description, and then enter the **Attachment Control Number** in the Value field. See Figure 6. If an attachment control number is not configured for No Fault charges, those charges will not be sent and will appear on the Bad Claims report.

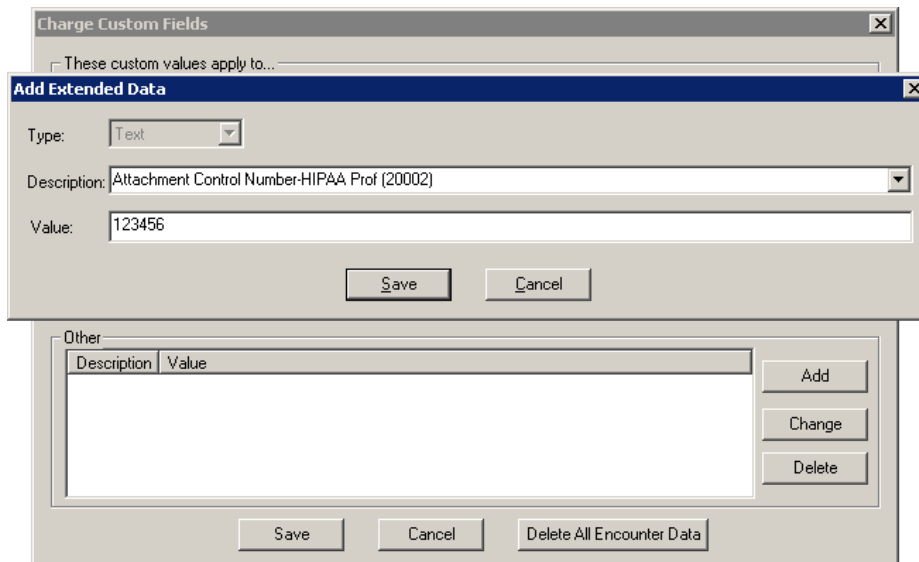


Figure 6 – Charge Custom Fields – Other – Attachment Control Number

## Insurance (continued)

### Insurance Billing – No Fault Claims (continued)

In addition, the fields in the Billing Instruction Codes section of the Charge Custom Fields dialog have been updated with Report Type codes that can be configured for No Fault charges to further indicate how follow-up documentation will be sent. See Figure 7. Do note, a report type code is not required to be configured to bill No Fault claims electronically, as the system will default the **RTOZ Report Type – Support Data for Claim** code into the billing file if a report type is not configured.

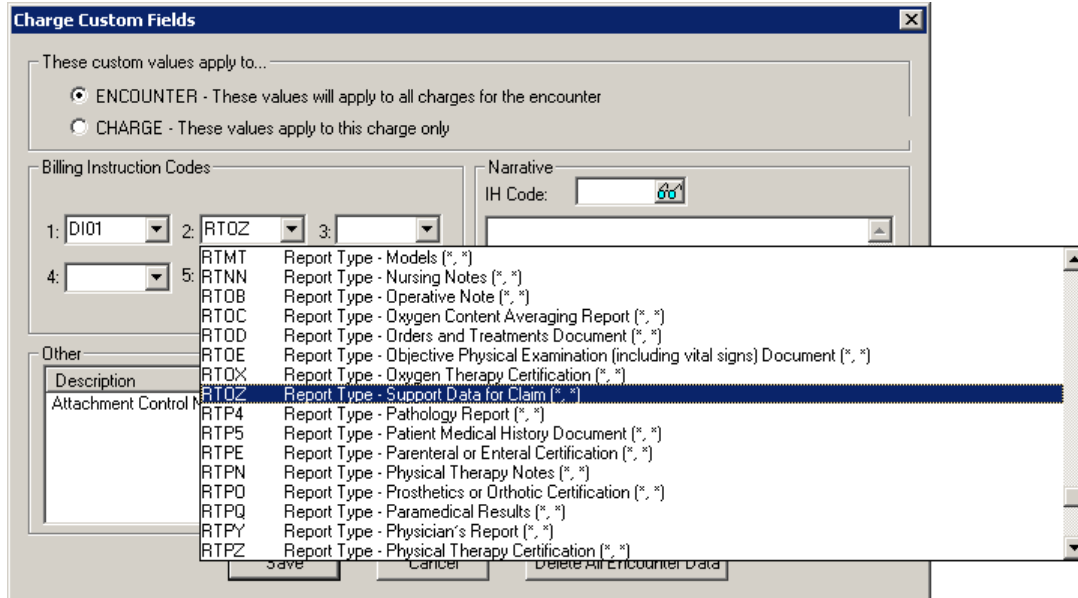


Figure 7 – Charge Custom Fields – Billing Instruction Codes – Report Type

- **Insurance Billing – Worker’s Compensation Claims** – The system has been updated to send Worker’s Compensation claims electronically through Change HealthCare. Whenever a charge has a Case Type of **CMP** (Worker’s Comp) it will be collected in the normal insurance billing process to Change Healthcare, and the patient billing for those charges will be automatically deferred. However, if a case category of **NYO** (NY Workers Comp C-5) or **NYW** (NY Workers Comp C-4) is configured for that CMP case type, then both insurance billing and patient billing will be automatically deferred, and those claims will not be sent electronically (this how these types of claims were handled previously). In addition, the system has been updated so those forms will not automatically pop-up for the NYO and NYW comp categories; to access the applicable forms you will need to click the Forms button.

## Patient (continued)

- **Patient – Patient Access\*** – The Patient Access dialog has been updated so that **PatientPortal** is designated correctly and consistently throughout the dialog. See Figure 8. Anywhere the text has deviated from the proper designation has been updated to **PatientPortal**.
- **Patient – Patient Access\*** – The Patient Access dialog has been updated so that whenever you **Authorize** the patient for PatientPortal, the system will automatically check the **Enable this patient for API access** option and generate an Authentication code, thereby also enabling them for API access in a single click. See Figure 8. Likewise, if the Authorize button associated with the **Send an authorization...** option was selected, the system will automatically check the **Send an email to this patient with their authentication code.** option for API; if the Authorize button associated with the **Print authorization instructions...** option was selected, the system will automatically check the **Print this patient's authentication code.** option for API; and if both Authorize buttons are selected, both API options will automatically be checked. In addition, the **Cancel** button, and cancellation functionality, has been removed from the Patient Access dialog, leaving **OK** as the only functional response to exiting the dialog.

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- API Access**
  - Enable this patient for API access
  - Authentication code: N/A
  - Print this patient's authentication code.
  - Send an email to this patient with their authentication code.
  - Generate a new authentication code for this patient. [Generate]
- Do not export on note, lab and scan signing
- Status Legend**
  - PatientPortal and API are not enabled
  - PatientPortal enabled and API is not enabled or PatientPortal not enabled and API is enabled
  - PatientPortal pending and API not enabled
  - PatientPortal is pending and API is enabled
  - PatientPortal and API are enabled
  - PatientPortal and API have note data not being sent (suspended)
- [Help] [OK]

Figure 8 – Patient Access

\* This change was part of the July 24, 2019 release of ChartMaker® 2018.2. No asterisk indicates that the change was included in the July 15, 2019 release of ChartMaker® 2018.2.

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