



# ChartMaker® Practice Manager Release Notes

ChartMaker® 2018.2 (fv6.3.2)

## 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, 2018 – Sept 30, 2019** 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, the Oct 1, 2017 – Sept 30, 2018 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 when hospitalization record is added or modified in the Rounding List of ChartMaker Mobile. See Figure 1. When an audit event occurs, the Activity Type column will display **Modify Patient**, and the Additional Info column will display **Hospitalization added from rounding list screen...**

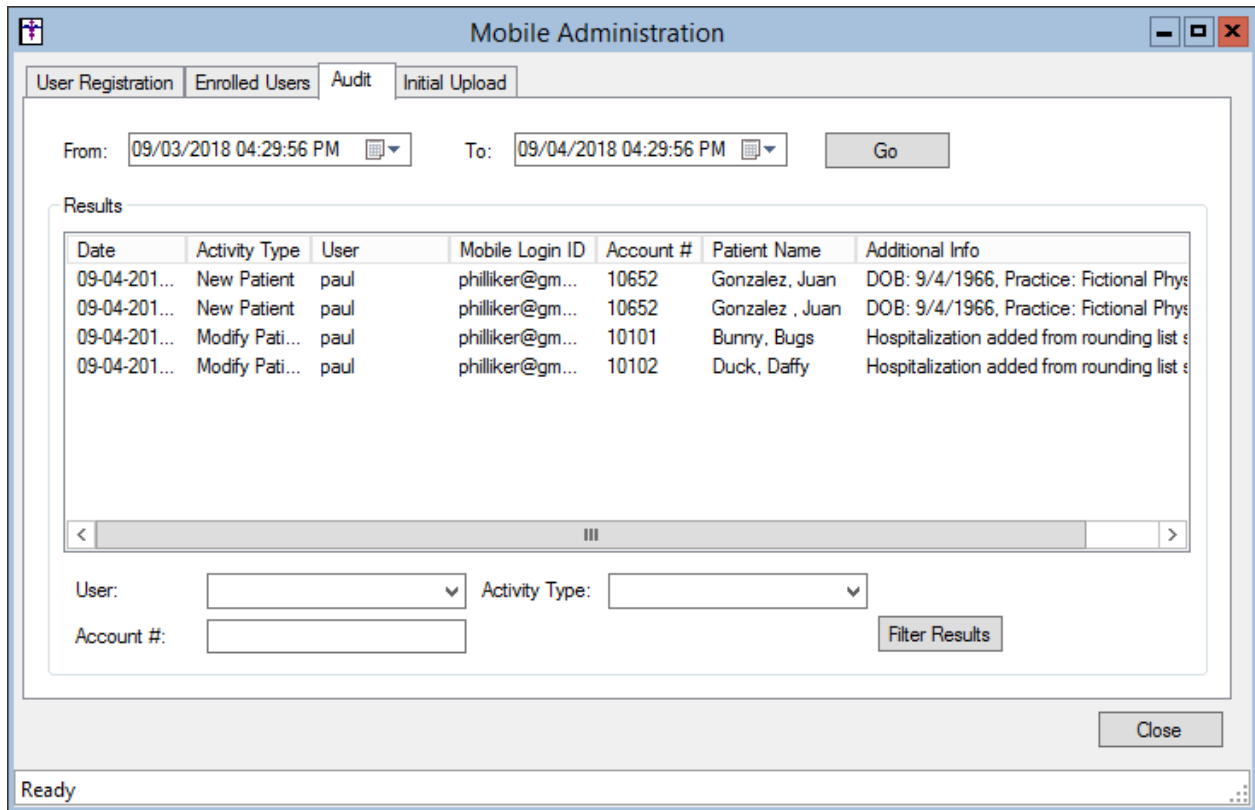


Figure 1 – Mobile Administration – Audit

- **Administration – Utilities – Audit – Audit Trail** – The Audit Trail has been updated to track whenever a hospitalization record is added or modified in Rounding List of ChartMaker® Mobile. When an audit event occurs, the Event column will display **Modified**; the Group column will display **Case**; the Audit Trail Description will display the **Added hospitalization** or **Modified hospitalization**; the Old Value and New Value columns will display the **Room #**, **Provider**, and **Facility** as applicable; and the patient's **Account #**, **Case Name**; and **Practice ID** will be listed in the Metadata column.

## Appointment

- **Appointment – Select Patient – Patient Access** – The Patient Access button has been updated to reflect the patient’s status for both PatientPortal and API Access, thereby easily alerting you in case there is an issue of access for the patient. Likewise, the Patient Access dialog has been updated with a Status Legend section outlining the color-scheme for the access status. See Figure 2.

**Patient Access**

Patient Portal account settings

Registration status:

Send an authorization email to the patient for patient portal registration.

or

Print authorization instructions for the patient to manually register on the patient portal.

API Access

Enable this patient for API access

Authentication code: FictionalDrsz5MXGdN1

Print this patient's authentication code.

Send an email to this patient with their authentication code.

Generate a new authentication code for this patient.

Do not export on note, lab and scan signing

Status Legend

- Patient Portal and API are not enabled
- Patient Portal enabled and API is not enabled or Patient Portal not enabled and API is enabled
- Patient Portal pending and API not enabled
- Patient Portal is pending and API is enabled
- PatientPortal and API are enabled
- PatientPortal and API have note data not being sent (suspended)

[Help](#)

**Figure 2 – Patient Access**

## Charge

- **Charge – Enter a Charge – Quick Pay** – The system has been updated with a new validation warning that is triggered when trying to save the quick pay when a copay credit is checked in the Copay Credits section of the Charge List – Quick Pay dialog but has not applied to charge by clicking the **Apply** button. See Figure 3.

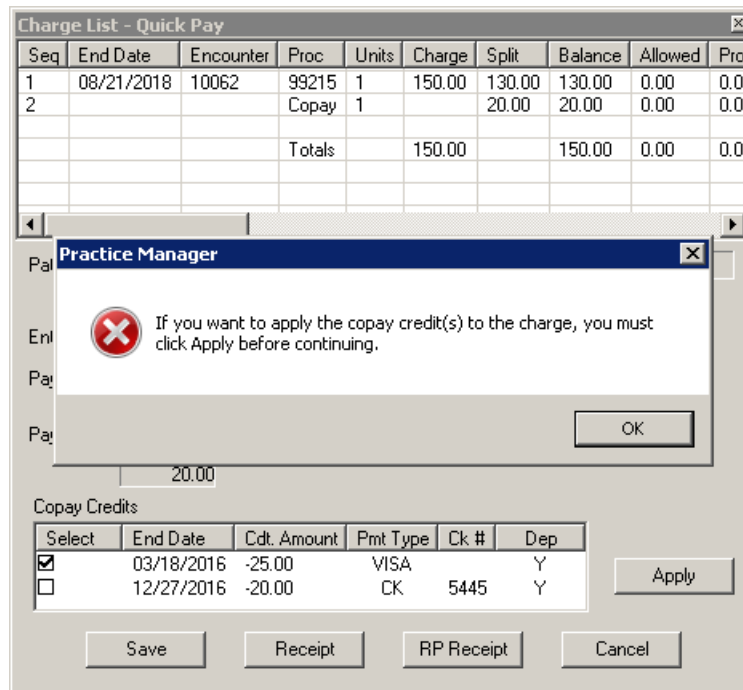


Figure 3 – Charge List – Quick Pay – Copay Credits Warning

- **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, 2018 – Sept 30, 2019** 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, the Oct 1, 2017 – Sept 30, 2018 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 – Enter a Charge – Forms – NY Worker’s Compensation** – The Additional Forms dialog, accessed via the **Forms** button, has been updated with new **C-4 AUTH 2018 ~ Request for Authorization, MG-1 2018 ~ Request for Optional Prior Approval, and MG-2 2018 ~ Request for Approval of Variance** forms that are required for use by 10/6/2018. Legacy forms will remain in case they are currently in use.
- **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, 2018 – Sept 30, 2019** 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, the Oct 1, 2017 – Sept 30, 2018 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.
- **Charge – Edit a Charge – Forms – NY Worker’s Compensation** – The Additional Forms dialog, accessed via the **Forms** button, has been updated with new **C-4 AUTH 2018 ~ Request for Authorization, MG-1 2018 ~ Request for Optional Prior Approval, and MG-2 2018 ~ Request for Approval of Variance** forms that are required for use by 10/6/2018. Legacy forms will remain in case they are currently in use.

## Clinical

- **Clinical – Immunization – Immunization Registry – PhilaVax** – The system has been updated so that the Philadelphia Immunization Information System (PhilaVax), 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 PhilaVax, immunization records will be automatically sent to the PhilaVax 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 Summary Report** – The SPARCS Summary Report has been updated so that claims that have errors will be displayed first. In addition, the Payer ID and Source of Payment will be displayed for secondary and tertiary insurances. Also, the Procedure Code and Rev Code will be displayed for all charge items.

## 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, 2018 – Sept 30, 2019** 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, the Oct 1, 2017 – Sept 30, 2018 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 system has been updated so that the Patient Hospitalization dialog will be updated with any additions or modifications to the hospital records for a patient made in ChartMaker® Mobile. Just as any changes made within the Patient Hospitalization dialog in Practice Manager will be reflected in the Rounding List of ChartMaker Mobile, now any changes made in the Rounding List will be reflected in Patient Hospitalization dialog.

## Patient (continued)

- **Patient – Patient Access** – The Patient Access button has been updated to reflect the patient’s status for both PatientPortal and API Access, thereby easily alerting you in case there is an issue of access for the patient. Likewise, the Patient Access dialog has been updated with a Status Legend section outlining the color-scheme for the access status. See Figure 4.

**Patient Access**

Patient Portal account settings

Registration status:

Send an authorization email to the patient for patient portal registration.

or

Print authorization instructions for the patient to manually register on the patient portal.

API Access

Enable this patient for API access

Authentication code: FictionalDrsz5MXGdN1

Print this patient's authentication code.

Send an email to this patient with their authentication code.

Generate a new authentication code for this patient.

Do not export on note, lab and scan signing

Status Legend

- Patient Portal and API are not enabled
- Patient Portal enabled and API is not enabled or Patient Portal not enabled and API is enabled
- Patient Portal pending and API not enabled
- Patient Portal is pending and API is enabled
- PatientPortal and API are enabled
- PatientPortal and API have note data not being sent (suspended)

[Help](#)

Figure 4 – Patient Access

Some icons are from the Silk icon set by Mark James (<http://www.famfamfam.com/>). All rights reserved. Licensed under a Creative Commons Attribution 2.5 License (<http://creativecommons.org/licenses/by/2.5/>).

Some icons are from the Fugue icon set by Yusuke Kamiyamane (<http://p.yusukekamiyamane.com/>). All rights reserved. Licensed under a Creative Commons Attribution 3.0 License (<http://creativecommons.org/licenses/by/3.0/>).