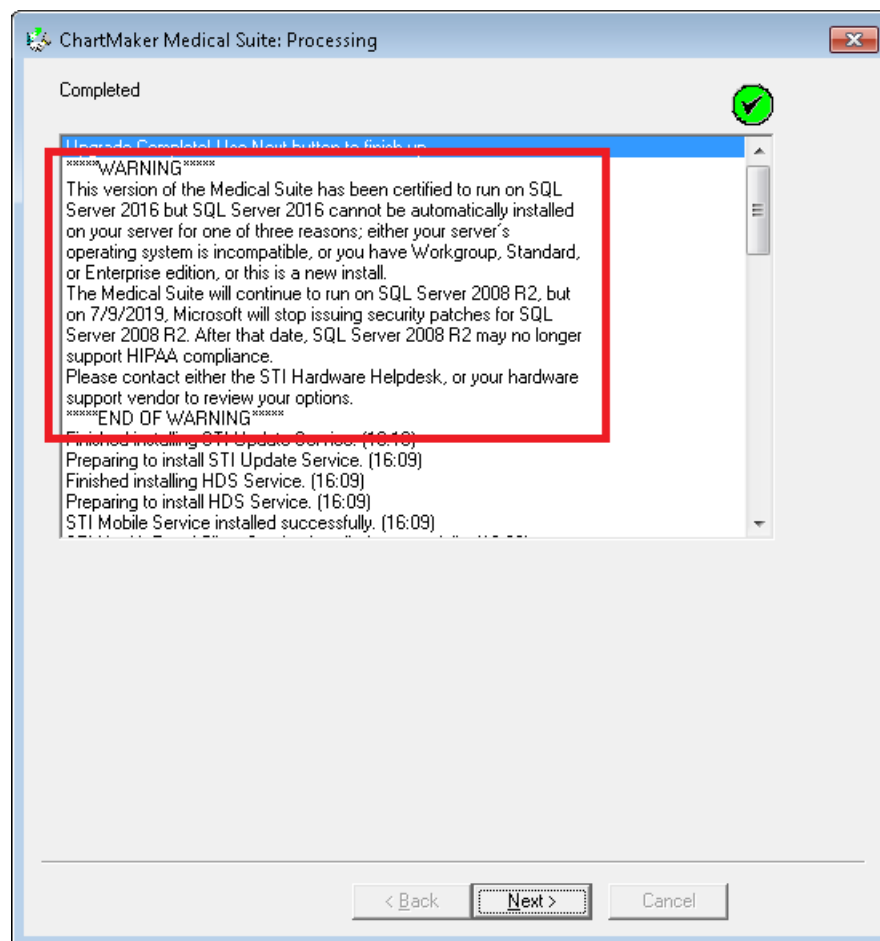


## ChartMaker® Practice Manager Release Notes

### ChartMaker® 2018.2 (fv6.3.5)

#### Important Notifications

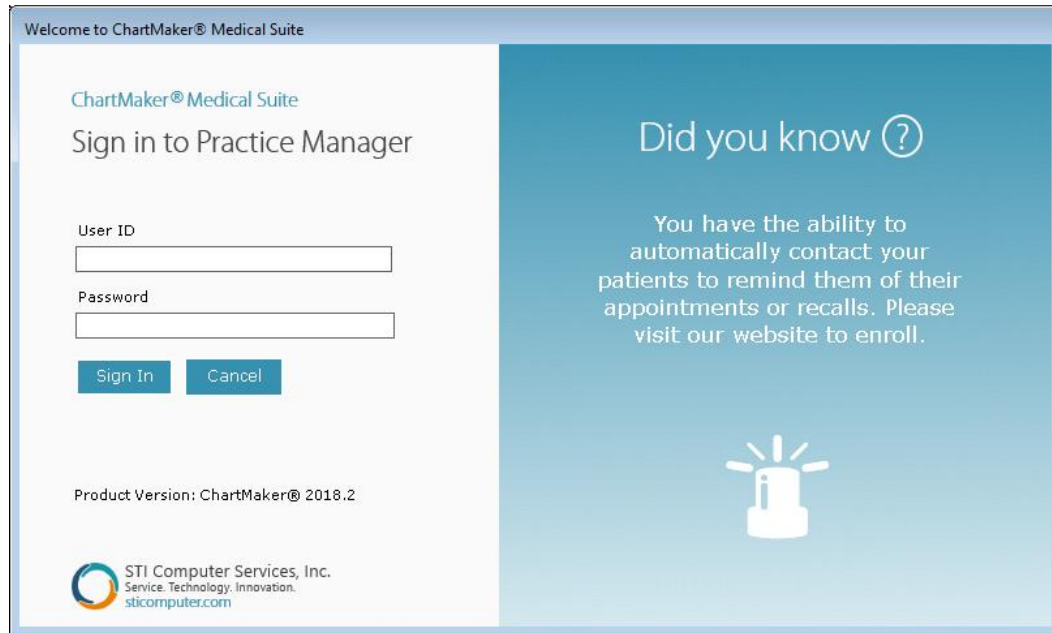
- **Upgrade from Microsoft Server 2008 and Windows 7** – In January 2020, your Windows 7 workstations and Microsoft 2008 Servers will no longer be supported. Even with security patches, [problems may still arise](#) if you choose not to upgrade. In addition, your workstations will no longer be HIPAA compliant. To avoid potential issues in the future, contact our [Technical Services Department](#) today.
- **SQL Server 2016 & the ChartMaker 2018.2 (File Version 6.3.3) 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**

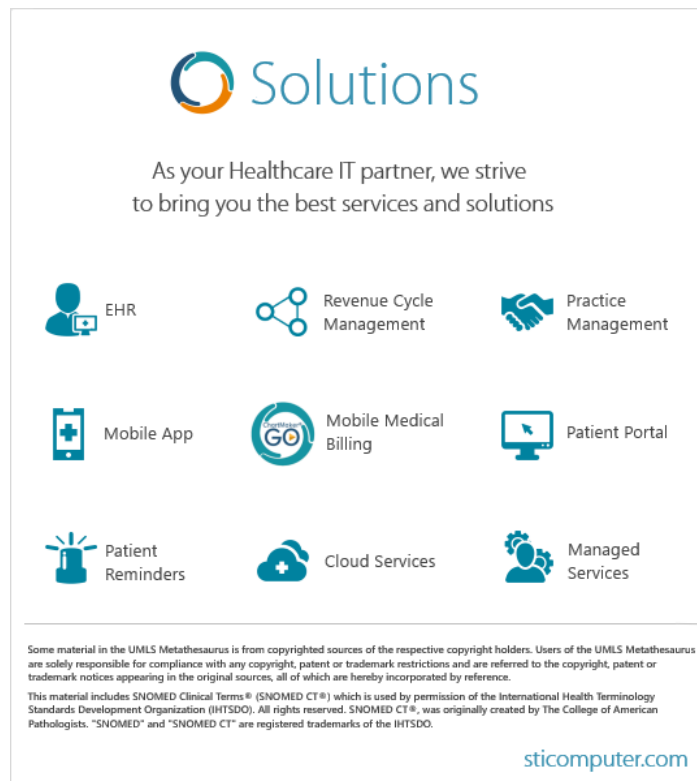
## General

- **System Login** – The Login screen for Practice Manager has been redesigned to include our new corporate logo, as well as a **Did you know?** section, on the right side of the screen, to better inform you of various new features within the ChartMaker Medical Suite, as well as additional services that STI offers. See Figure 1. Logging into Practice Manager is similar as before, by entering the **User ID** and **Password**, and then clicking the **Sign In** button. Likewise, if your system has multiple databases, a **Database** field will be appear allowing you to select the applicable database.



**Figure 1 – Welcome to ChartMaker® Medical Suite**

After you have successfully logged on, a new splash screen will appear listing the various services and solutions STI provides. See Figure 2.



**Figure 2 – Solutions – Splash Screen**

## General (continued)

- To-Do List** – The To-Do List dialog (accessed by clicking **To-Do > View To-Do List**) has been updated with the ability to filter to-do list items by Subject. By clicking the Subject heading you can sort in ascending order, or, by clicking the Subject heading again, in descending order. Likewise, you can select a Subject heading to view by clicking the corresponding drop-down list. See Figure 3. Do note, however, when selecting a specific subject via the drop-down list, the drop-down list will only contain those subjects contained on the page of the To-Do List you are currently viewing.

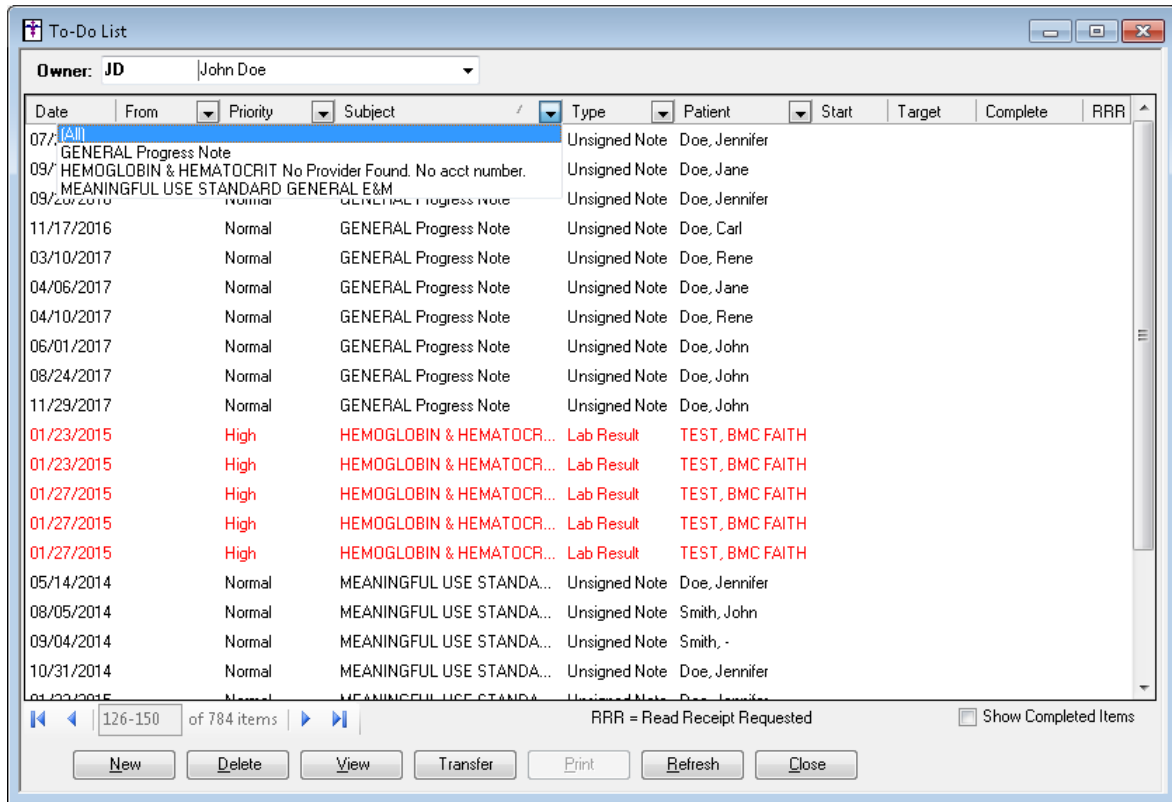


Figure 3 –To-Do List

## Charge

- Charge – Pending Charges** – The Pending Charges tab has been updated with more enhanced filtering options that allow you to sort charges by **Account#/Service Date**, **Procedure**, or **Service Date**, as well as ordering those charges with in the selected sort option in **Ascending** or **Descending** order. See Figure 4. When the Account#/Service Date option is selected, the charges will be sorted by account number first, and then by service date.

4. Pending Charges																
Sort By: <input checked="" type="radio"/> Account#/Service Date <input type="radio"/> Procedure <input type="radio"/> Service Date Order By: <input checked="" type="radio"/> Ascending <input type="radio"/> Descending <span style="float: right;">Unmatched Charges</span>																
Practice	Account #	Case Type	Case ID #	Service Date	Procedure	Mod1	Mod2	ICD10 1	ICD10 2	ICD9 1	ICD9 2	Amount	Payment	Insurance	Comment/Note	
	10009	NRM	10016	02/12/2014	89240							0	0	AET		
1	10009	NRM	10016	08/14/2015	87088							0	0	AET		
1	10009	NRM	10016	08/14/2015	81015							0	0	AET		
1	10009	NRM	10016	08/14/2015	81050			N92.6				0	0	AET		
1	10009	NRM	10016	08/14/2015	82436			N92.6				0	0	AET		
1	10009	NRM	10016	08/14/2015	81099			N92.6				0	0	AET		
1	10009	NRM	10016	08/14/2015	82615			N92.6				0	0	AET		
1	10009	NRM	10016	09/09/2015	99245			I10				0	0	AET		
1	10009	NRM	10016	09/09/2015	81005							0	0	AET		
1	10012	NRM	10012	01/07/2019	99242			F03.91				0	0	MCD		
1	10040	NRM	10023	11/27/2018	99245			I10				0	0	MCD		

Figure 4 – Charge – Pending Charge

## Clinical

- **Clinical – Immunization – Immunization Registry – NYSIIS** – The system has been updated so that the New York State Immunization Information System (NYSIIS), in conjunction with the ChartMaker® Medical Suite, utilizes 2.5.1 v1.5 HL7 bidirectional messaging and exchange of vaccine (immunization) information. Once the system is set up, and you are enrolled with NYSIIS, immunization records will be automatically sent to the NYSIIS 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.

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