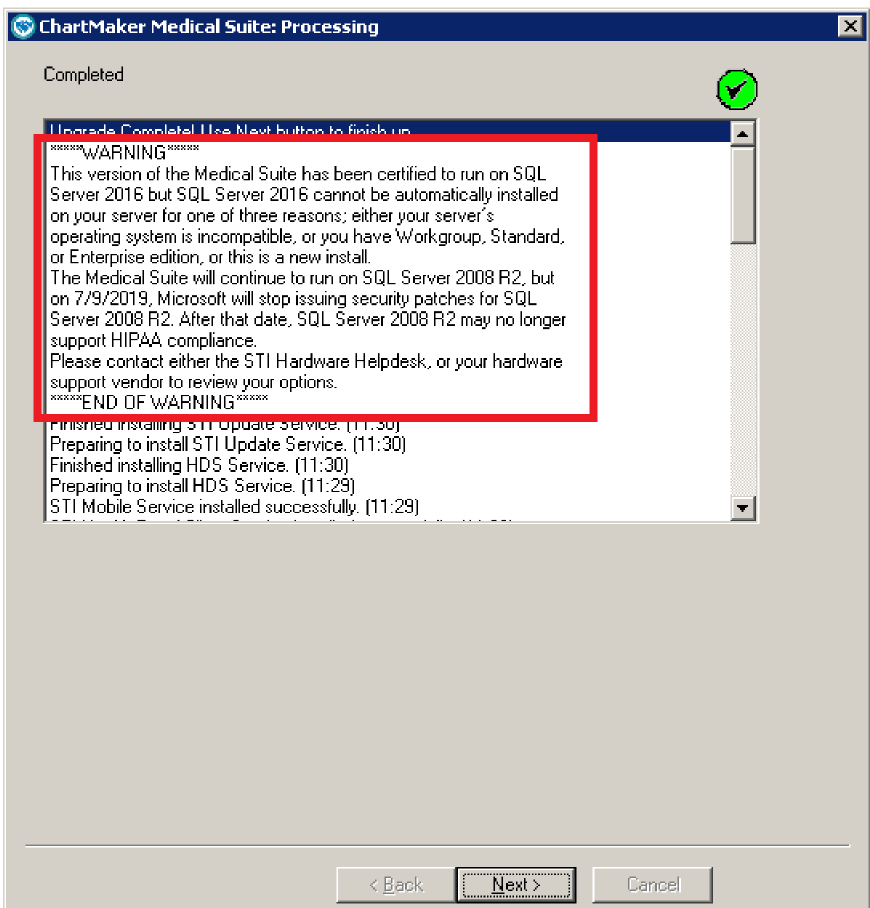
ChartMaker® Practice Manager Release Notes

ChartMaker® 2018.2 (fv6.3.7)

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 HIPPA 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 pending charge has been viewed (by either double-clicking a charge in the Pending Charges tab or selecting a charge and clicking the **Process** button). When an audit event occurs, the Event column will display **Viewed**; the Group column will display **Charge**; the Audit Trail Description will display the **Pending Charge: Service Date: [mm/dd/yyyy] CPT: [CPT Code]**; and the patient's **Account #** will be listed in the Metadata column. Do note, that if you select multiple pending charges, only the first charge will be listed with an Event of Viewed, however, if you process and save those multiple charges, an individual entry with an event of Created will be displayed for all charges saved (see last Audit Trail entry below for details on how those audit events will be displayed).

- **Administration – Utilities – Audit – Audit Trail –** The Audit Trail has been updated to track whenever the processing of a pending charge has been cancelled (by pressing the Cancel in the Enter a Charge tab after accessing a charge via the Pending Charges tab). When an audit event occurs, the Event column will display **Canceled**; the Group column will display **Charge**; the Audit Trail Description will display the **Pending Charge: Service Date: [mm/dd/yyyy] CPT: [CPT Code]**; and the patient's **Account #** will be listed in the Metadata column.

- **Administration – Utilities – Audit – Audit Trail –** The Audit Trail has been updated to track whenever a charge has been created, either through processing a pending charge, or when manually entering a charge. When an audit event occurs, the Event column will display **Created**; the Group column will display **Charge**; and the Audit Trail Description will be dependent on how the charge was saved. If the **Save** button was clicked, the description will be **Charge: Service Date: [mm/dd/yyyy] CPT: [CPT Code]**; if the **Next Procedure** button was clicked, the description will be **Next Procedure: Service Date: [mm/dd/yyyy] CPT: [CPT Code]**; if the **Quick Pay** button is clicked, then the **Save** button is clicked in the Charge List – Quick Pay dialog, the description will be **Quick Pay: Service Date: [mm/dd/yyyy] CPT: [CPT Code]**; if the **Quick Pay** button is clicked, then the **Receipt** button is clicked in the Charge List – Quick Pay dialog, the description will be **Quick Pay Receipt: Service Date: [mm/dd/yyyy] CPT: [CPT Code]**; if the **Quick Pay** button is clicked, then the **RP Receipt** button is clicked in the Charge List – Quick Pay dialog, the description will be **Quick Pay RP Receipt: Service Date: [mm/dd/yyyy] CPT: [CPT Code]**; if the **Receipt** button is clicked, the description will be **Receipt: Service Date: [mm/dd/yyyy] CPT: [CPT Code]**; and if the **RP Receipt** button is clicked, the description will be **RP Receipt: Service Date: [mm/dd/yyyy] CPT: [CPT Code]**. Additionally, the patient's **Account #** will be listed in the Metadata column.

Clinical

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

General

- **System Login –** The **Did you know?** section, on the right side of the Sign in to Practice Manager screen, has been updated to include links (**Enroll Here**, **Learn More Here**, **Register Here**, **Sign Up Here**) to our website, that will provide you with additional information or enrollment opportunities for the applicable feature item highlighted in the login screen. See Figure 1 and 2. Simply, click the link and the applicable page our website will be opened in your internet browser. Do note, there are a few of the feature items do not contain links.

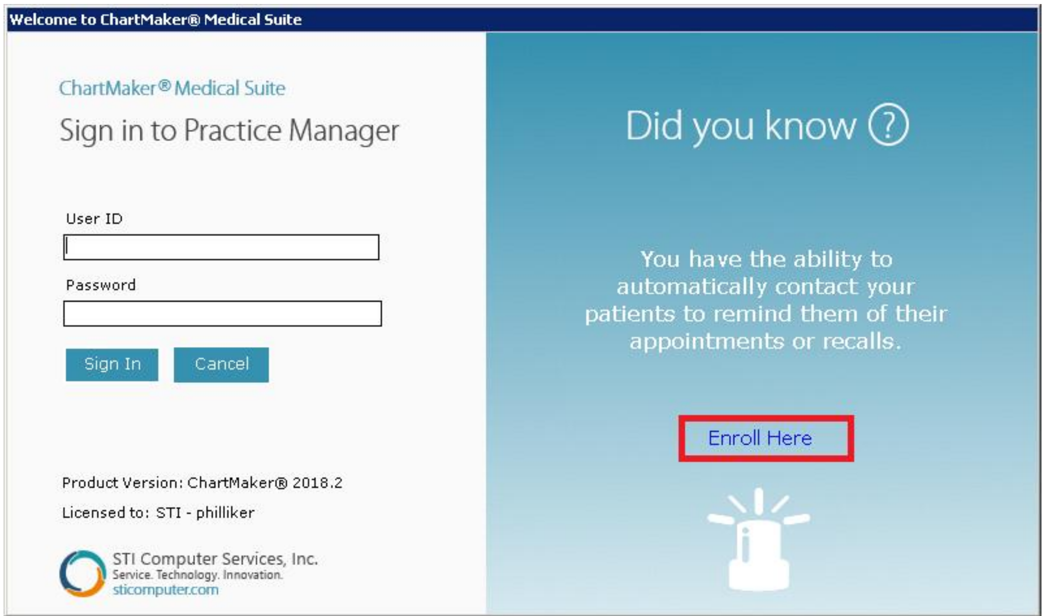


Figure 1 – Welcome to ChartMaker® Medical Suite

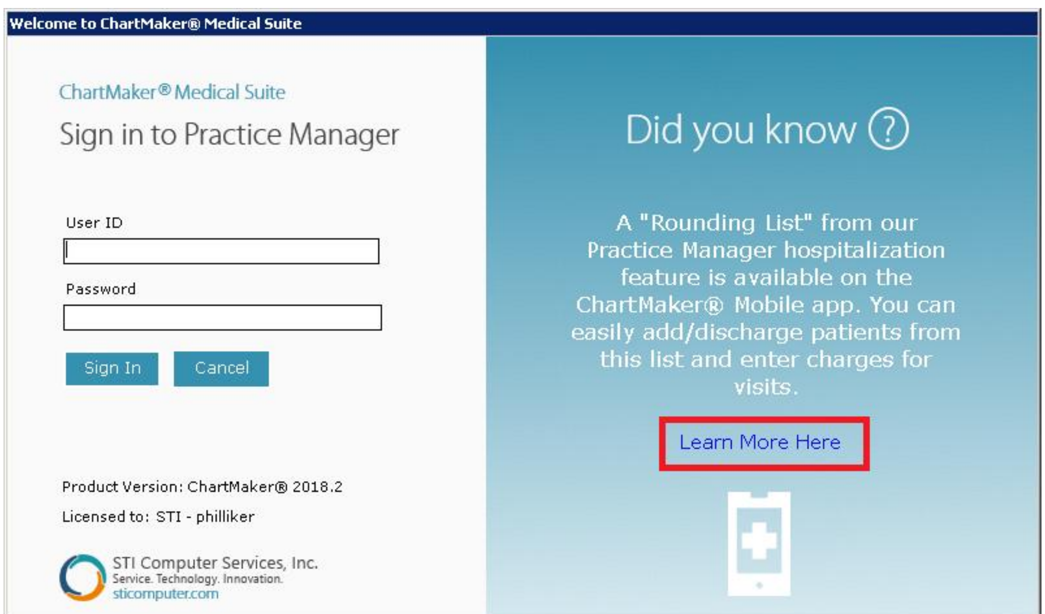


Figure 2 – Welcome to ChartMaker® Medical Suite