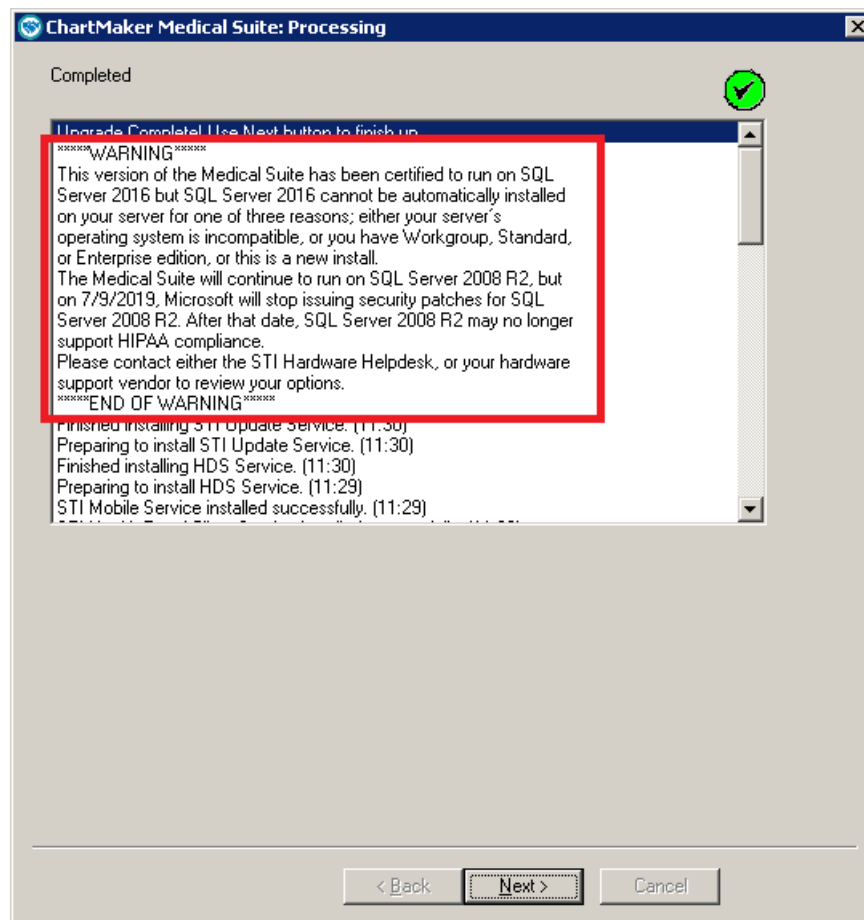


ChartMaker® Practice Manager Release Notes

ChartMaker® 2018.2 (fv6.4.1)

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

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, 2019 – Sept 30, 2020** 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, the Oct 1, 2018 – Sept 30, 2019 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 – Utilities – Audit – Audit Trail** – The Audit Trail has been updated to track whenever a new internal To-Do List Message is created. When an audit event occurs, the Event column will display **Created**; the Group column will display **To-Do List**; the Audit Trail Description will display the **To-Do List Message Created**; the New Value will display the message **[Subject] – [Body]**; and the recipients in the **To, CC, and From** fields will be listed in the Metadata column.
- **Administration – Utilities – Audit – Audit Trail** – The Audit Trail has been updated to track whenever a read notification is sent for an internal To-Do List Message. When an audit event occurs, the Event column will display **Created**; the Group column will display **To-Do List**; the Audit Trail Description will display the **To-Do List Message Read Notification Created**; the Old Value will display the original message **[Subject] – [Body]**; the New Value will display the message **[Subject] – [Body]** and any changes or updates (read, deleted, etc.) that were made; and the recipients in the **To, CC, and From** fields will be listed in the Metadata column.
- **Administration – Utilities – Audit – Audit Trail** – The Audit Trail has been updated to track whenever an internal To-Do List Message has been replied to. When an audit event occurs, the Event column will display **Replied**; the Group column will display **To-Do List**; the Audit Trail Description will display the **To-Do List Message Modified**; the Old Value will display the original message **[Subject] – [Body]**; the New Value will display **RE: [Subject] – [Body]**, any changes and updates to the subject and/or body, and the message string; and the recipients in the **To, CC, and From** fields will be listed in the Metadata column.
- **Administration – Utilities – Audit – Audit Trail** – The Audit Trail has been updated to track whenever an internal To-Do List Message is forwarded. When an audit event occurs, the Event column will display **Created**; the Group column will display **To-Do List**; the Audit Trail Description will display the **To-Do List Message Created**; the Old Value will display the original message **[Subject] – [Body]**; the New Value will display **FW: updated message [Subject] – [Body]** and the forwarded message string; and the recipients in the **To, CC, and From** fields will be listed in the Metadata column.
- **Administration – Utilities – Audit – Audit Trail** – The Audit Trail has been updated to track whenever an internal To-Do List Message is deleted. When an audit event occurs, the Event column will display **Deleted**; the Group column will display **To-Do List**; the Audit Trail Description will display the **To-Do List Message Deleted**; the Old Value will display the message **[Subject] – [Body]** and any message string at the time of deletion; and the recipients in the **To, CC, and From** fields will be listed in the Metadata column.

Appointment

- **Appointment – Select Patient – Patient Access** – When enabling a patient for API Access (via the Patient Access dialog), the email and/or printout message has been updated to provide a clearer indication of what API Access entails and how it is used. See Figure 1.

From: ChartMaker® PatientPortal <noreply@chartmakerpatientportal.com>
Sent: Wednesday, August 28, 2019 11:00 AM
To: [REDACTED]
Subject: API Access

Dear Tony,

In addition to viewing your health information in the Chartmaker® Patient Portal offered by Fictional Physicians, you can now use any participating third - party application to view your health information 24 hours a day.

This is an optional service. If you are interested in using a third party, please provide them with the authentication code listed below.

Fictional Drs YQvZZpSI

This authentication code is case sensitive. Please allow up to 1 hour for your health information to become available.

Figure 1 – API Access Message

Charge

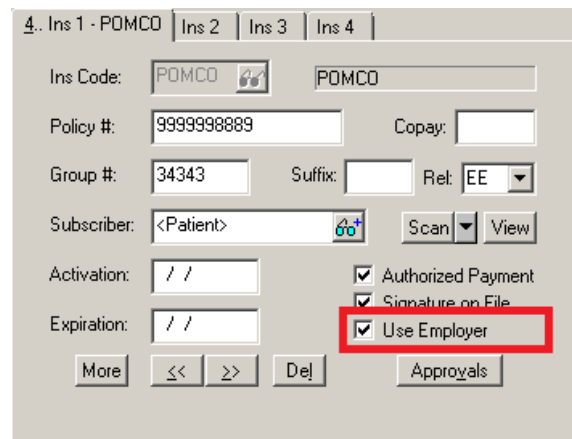
- **Charge – Enter a Charge** – The **ICD10 Code Set** field, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with an **October 1, 2019 – Sept 30, 2020** code set when searching for diagnosis codes or using the crosswalk functionality. You can toggle between the 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, the Oct 1, 2018 – Sept 30, 2019 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 – 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, 2019 – Sept 30, 2020** 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, the Oct 1, 2018 – Sept 30, 2019 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.

Clinical

- **Clinical – Immunization – Immunization Registry – Florida Shots** – The system has been updated so that the Florida Shots Immunization Registry, 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 FL Shots, immunization records will be automatically sent to the FL Shots 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.
- **Clinical – Immunization** – The program has been updated to ensure that the latest MVX codes and MVX mappings, and Manufacturers, per the latest CDC guidelines, are used for immunization procedures.

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, 2019 – Sept 30, 2020** 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, the Oct 1, 2018 – Sept 30, 2019 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 – Insurance** – The Insurance section of the Patient screen has been updated with a **Use Employer** checkbox that allows you to use the Employer, attached to the patient's account, as the subscriber. See Figure 2. Employers can be attached to a patient's account via the Subscriber and Responsible Party fields for the selected case, or in the Employer field in the Additional Information section. When a billing file is created and the Use Employer option is selected, the employer's name and address will appear in the applicable segments of the billing file.



The screenshot shows a software interface for managing patient insurance. At the top, there are tabs for 'Ins 1 - POMCO', 'Ins 2', 'Ins 3', and 'Ins 4'. Below the tabs, there are several input fields: 'Ins Code' (POMCO), 'Policy #' (9999998889), 'Group #' (34343), 'Subscriber' (<Patient>), 'Activation' (//), and 'Expiration' (//). There are also checkboxes for 'Authorized Payment', 'Signature on File', and 'Use Employer' (which is checked and highlighted with a red box). At the bottom, there are buttons for 'More', '<<', '>>', 'Del', and 'Approvals'.

Figure 2 – Patient – Case – Insurance

Patient (continued)

- **Patient – Other – Consent** – The Medication History Consent section, of the Consent dialog, has been updated so that the Provider drop-down field has been removed. See Figure 2. With the update to the NCPDP 2017071 schema format, you can no longer request medication history be an individual provider.

Figure 3 – Patient – Other – Consent

- **Patient – Patient Access** – When enabling a patient for API Access (via the Patient Access dialog), the email and/or printout message has been updated to provide a clearer indication of what API Access entails and how it is used. See Figure 4.

From: ChartMaker® PatientPortal <noreply@chartmakerpatientportal.com>

Sent: Wednesday, August 28, 2019 11:00 AM

To: [REDACTED]

Subject: API Access

Dear Tony,

In addition to viewing your health information in the Chartmaker® Patient Portal offered by Fictional Physicians, you can now use any participating third - party application to view your health information 24 hours a day.

This is an optional service. If you are interested in using a third party, please provide them with the authentication code listed below.

FictionalDrsYQvZZpSI

This authentication code is case sensitive. Please allow up to 1 hour for your health information to become available.

Figure 4 – API Access Message

Reports

Financial Reports

- **System Analysis → Monthly** – This report has been updated so that the Visits column heading has been changed to **Encounters** to more accurately denote the values in this column.

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