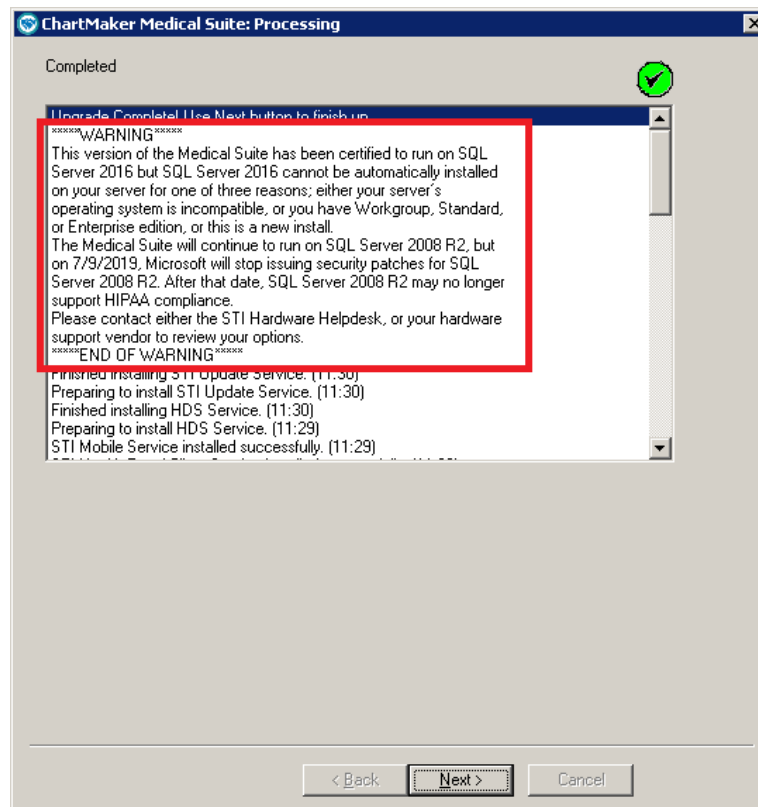


ChartMaker® Practice Manager Release Notes

ChartMaker® 2022.1 (fv6.8.0)

Important Notifications

- **Upgrade from Microsoft Server 2008/2012 and Windows 7/8** – Since January 2020, your **Windows 7/8** workstations and **Microsoft 2008 Servers** are no longer supported. Likewise, support for **Windows 8.1** will end on January 10, 2023, and support for **Windows Server 2012/2012R2** will end on October 10, 2023. Even with security patches, problems may still arise if you choose not to upgrade. In addition, your workstations are not HIPAA compliant. To avoid these issues, 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

Add- Ins

- Clinical – Immunizations – Vaccine Inventory Report** – The **Vaccine Inventory Report** dialog (accessed via **Add-Ins > Clinical > Immunizations > Vaccine Inventory Report**) has been updated with a **Patient Reconciliation** section that allows you to generate a **Patient Vaccine Reconciliation Report** for an **Immunization administered** date range for selected Lot # and Storage units. See Figure 1. To make room for the Patient Reconciliation section, the **Immunizations that need to be reordered** and **Include expired immunization lots** options have been moved to the top-right of the dialog.

To generate a reconciliation report, simply configure the **Immunization administered** date range, and then select a **Reconcile** option. If the **Selected items** option is selected, highlight the applicable Lot #/Storage rows you wish to include in the report, and then click the **Reconcile** button.

Vaccine Inventory Report

☐ Immunizations that need to be reordered ☐ Include expired immunization lots

Immunization	CPT Code	Manufacturer	Lot #	Expiration	Funding	Storage	Quantity	Reorder Point
MMR VACCINE, SC	90707	Abbott Laboratories	123456789	11/30/2024	Private funds	Storage A	48.00	10
MMR VACCINE, SC	90707	Abbott Laboratories	123456789	11/30/2024	Private funds	Storage B	49.00	5

Patient Reconciliation
 Immunizations administered
 From: 5/7/2024 To: 6/7/2024
 Reconcile ☒ Selected items ☐ All items
 Reconcile

Refresh Save Report Close

*Double-click quantity amount to make an adjustment

Figure 1 – Vaccine Inventory Report

The **Patient Vaccine Reconciliation Report** dialog will then display the patients that had immunization administered for the selected Lot #/Storage units. See Figure 2. You can sort the patients in the report by each column heading, and select a specific Account #, Lot #, Storage Unit, Primary Insurance, VFC Eligibility, and/or Funding value as needed. If you hover over the account number, a tooltip will be displayed indicating if the immunization was administered, historical, or not performed. A summary of the total quantity administered for each Lot #/Storage Unit will be displayed in the bottom left. You can also click the **Save Report** button to save a PDF file of the report.

Patient Vaccine Reconciliation Report

Immunizations administered from 5/7/2024 to 6/7/2024

Date	Account#	CPT	Lot #	Storage Unit	Dose	Primary Insurance	VFC Eligibility	Funding	Given By
06/07/2024	10013	90707	123456789	Storage A		Aetna PPO		Private funds	JD

Administered

Lot#	Storage Unit	Total Quantity Administered
123456789	Storage A	1

Save Report Close

Figure 2 – Patient Vaccine Reconciliation Report

Add- Ins (continued)

- Clinical – Immunizations – Vaccine Inventory Report** – The **Vaccine Inventory Report** dialog (accessed via **Add-Ins > Clinical > Immunizations > Vaccine Inventory Report**) has been updated so that you can modify the immunization inventory quantity for a Lot #/Storage unit by double-clicking the corresponding Quantity. The Inventory Management dialog will appear for the Lot #/Storage unit allowing you to make an **Adjustment**, as well as selecting an **Adjustment Reason** and **Comment** as needed. See Figure 3. After saving the adjustment the adjusted quantity will populate in the applicable fields.

The screenshot shows the 'Vaccine Inventory Report' window. At the top, there are checkboxes for 'Immunizations that need to be reordered' and 'Include expired immunization lots'. Below is a table with the following data:

Immunization	CPT Code	Manufacturer	Lot #	Expiration	Funding	Storage	Quantity	Reorder Point
MMR VACCINE, SC	90707	Abbott Laboratories	123456789	11/30/2024	Private funds	Storage A	48.00	10
MMR VACCINE, SC	90707						49.00	5

The 'Inventory Management' dialog is open, showing the following fields:

- Storage Unit: Storage A
- Reorder Point: 10
- Adjustment Reason: Administered
- Current Quantity: 48.00
- Adjustment (+/-): 2.00
- New Quantity: 50.00
- Comment: (empty field)

Buttons at the bottom of the dialog include 'Save' and 'Cancel'. At the bottom of the main window, there are buttons for 'Refresh', 'Save Report', and 'Close'. A note at the bottom right says: '*Double-click quantity amount to make an adjustment'.

Figure 3 – Vaccine Inventory Report – Inventory Management

- Reports – NCQA Diversity Requirements** – The system has been updated with a new **NCQA Diversity Requirements Report** (accessed via **Add-Ins > Reports > NCQA Diversity Requirements**), that displays encounter counts and percentages of the total patient population for each facility, broken down by the patient demographic categories of Race, Ethnicity, Language, Sexual Orientation, Gender Identity, and Zip Code. See Figure 4. This report can be filtered by **Facility** and/or **Provider** via the corresponding drop-down fields, allowing you to choose a single, multiple, or all facilities and/or providers, as needed. Likewise, after running the report via the **Run Report** button, you can also save the report as a PDF via the **Save Report** button. Do note, that this report is like the Managed Care report, Encounter Analysis – NCQA Diversity Requirements, however, with this new report, accessed via the Add-Ins menu, you able to filter on multiple facilities and providers.

The screenshot shows the 'NCQA Diversity Requirements Report' window. At the top, there are dropdowns for 'Facility' (STI Medical Practice) and 'Provider' (5, 3, 2, 4, 1). A 'Run Report' button is on the right. The main table has the following data:

Facility	Category	Patient Population
STI Medical Practice	Total number of Unique patients	30
	ETHNICITY	
	Hispanic or Latino	0 / 30 (0.00%)
	Not Hispanic or Latino	0 / 30 (0.00%)
	Declined to Specify	1 / 30 (3.33%)
	None	29 / 30 (96.67%)
	GENDER IDENTITY	
	Identifies as Male	0 / 30 (0.00%)
	Identifies as Female	1 / 30 (3.33%)
	Female-to-Male (FTM)/Transgender Male/Tran...	0 / 30 (0.00%)
	Male-to-Female (MTF)/Transgender Female/Tr...	0 / 30 (0.00%)
	Genderqueer, neither exclusively male nor female	1 / 30 (3.33%)
	Additional gender category or other, please spe...	0 / 30 (0.00%)
	Choose not to disclose	1 / 30 (3.33%)
	None	27 / 30 (90.00%)
	LANGUAGE	
	Afar	0 / 30 (0.00%)
	English	1 / 30 (3.33%)
	Other	0 / 30 (0.00%)
	Declined to Specify	0 / 30 (0.00%)
	Non Language	0 / 30 (0.00%)

Buttons at the bottom include 'Save Report' and 'Close'.

Figure 4 – NCQA Diversity Requirements Report

Administration

- **Administration – Code Tables – Codes – Vaccine Storage** – The system has been updated so you cannot delete vaccine storage units that are linked to an immunization given to a patient in either the Practice Manager or Clinical. When attempting to delete a storage unit in the Code Table Maintenance – Vaccine Storage dialog (**Administration > Code Tables > Codes > Vaccine Storage**) that is linked to an immunization procedure, a message will appear stating, “This vaccine storage cannot be deleted because it is linked to patient immunization records.” See Figure 5.

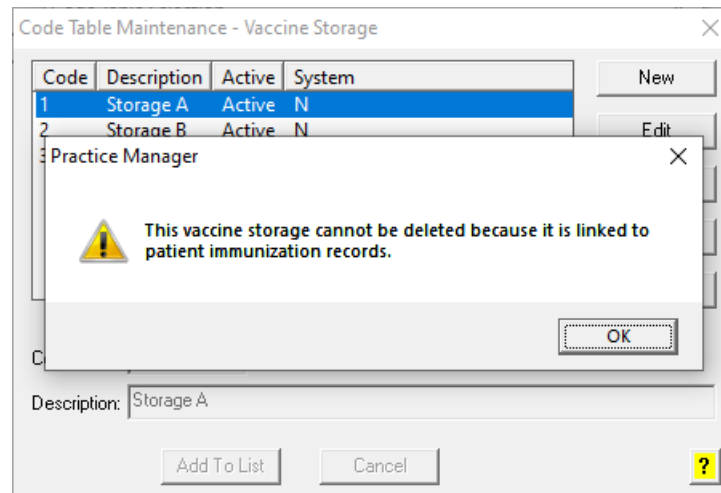


Figure 5 – Code Table Maintenance – Vaccine Storage

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.

Reports

Managed Care Reports

- **Encounter Analysis → NCQA Diversity Requirements** – To meet the NCQA/PCMH reporting requirements for 2024, the **NCQA Diversity Requirements** report has been updated with a Language section that displays encounter counts and percentages of the total patient population for each facility, broken down by language. See Figure 6. Do note, that patients who have charges/encounters that are **not** associated with a facility will not be displayed.

NCQA Diversity Requirements Report

Facility Albany Medical Center (AMC) - 7 Patients

Zip Code

08026	1 / 7 (14.29%)
08080	1 / 7 (14.29%)
14240	1 / 7 (14.29%)
18018	1 / 7 (14.29%)
19333	1 / 7 (14.29%)
194031129	1 / 7 (14.29%)
44306	1 / 7 (14.29%)

Race

American Indian or Alaska Native	0 / 7 (0.00%)
Asian	0 / 7 (0.00%)
Black/African American	0 / 7 (0.00%)
Declined to specify	0 / 7 (0.00%)
Hispanic	0 / 7 (0.00%)
Native Hawaiian or Other Pacific Island	0 / 7 (0.00%)
White	1 / 7 (14.29%)
None	6 / 7 (85.71%)

Ethnicity

Declined to Specify	0 / 7 (0.00%)
Hispanic or Latino	1 / 7 (14.29%)
Not Hispanic or Latino	3 / 7 (42.86%)
None	3 / 7 (42.86%)

Language

Afar	0 / 7 (0.00%)
Declined to Specify	0 / 7 (0.00%)
English	3 / 7 (42.86%)
Other	0 / 7 (0.00%)
Sign Language	0 / 7 (0.00%)
Spanish	0 / 7 (0.00%)
None	4 / 7 (57.14%)

Sexual Orientation

Lesbian, gay or homosexual	1 / 7 (14.29%)
Straight or heterosexual	0 / 7 (0.00%)
Bisexual	0 / 7 (0.00%)
Something else, please describe	0 / 7 (0.00%)
Don't know	0 / 7 (0.00%)
Choose not to disclose	1 / 7 (14.29%)
None	5 / 7 (71.43%)

Gender Identity

Identifies as Male	0 / 7 (0.00%)
Identifies as Female	1 / 7 (14.29%)
Female-to-Male (FTM)/Transgender Male/Trans Man	0 / 7 (0.00%)
Male-to-Female (MTF)/Transgender Female/Trans Woman	0 / 7 (0.00%)
Genderqueer, neither exclusively male nor female	2 / 7 (28.57%)
Additional gender category or other, please specify	1 / 7 (14.29%)
Choose not to disclose	1 / 7 (14.29%)
None	4 / 7 (57.14%)

Figure 6 – Encounter Analysis - NCQA Diversity Requirements

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 Kaniyamane (<http://p.yusukekaniyamane.com/>). All rights reserved. Licensed under a Creative Commons Attribution 3.0 License (<http://creativecommons.org/licenses/by/3.0/>).