Prior to Loading this Update, Please Read the Following Important Information, Regarding…

- **User Defined Report Configurations** – Please be aware that it is possible that some of your user-defined Report Configurations may be removed from the system or will not work when loading this update. This is due to the fact that some reports have been eliminated from the system, while other reports have been combined together. Because these reports will no longer exist, when they are removed from the database any user-defined configurations that were attached to them will also be removed. See the Reports section of this document for specific details for individual reports.

  To assist you in recreating these user-defined configurations (if desired), a report listing all of the user-defined report configurations in the system will be automatically produced prior to the database upgrade process for this release. This report will be saved to the hard-drive and can be accessed at your convenience. Once this report has been printed, you can print another report listing the remaining user-defined report configurations in the updated database. By comparing these two reports, it will be possible to determine which, if any, user-defined report configurations were removed during the database upgrade. These reports will then have to be manually reconfigured.

- **800 x 600 Screen Resolution** – Please be aware that with this release of ChartMaker® Practice Manager the screen resolution of 800 x 600 will no longer be supported. The program has been updated to require a display setting of at least 1024 x 768. Users that have a screen resolution of 800 x 600 may experience a limited view of the Practice Manager screen requiring you to scroll to view certain screen items and buttons; and, in some cases, certain objects and function buttons may not be displayed. For information on changing your display settings to 1024 x 768, if needed, please consult the Practice Manager Help System (Contents > About Practice Manager > Change Screen Resolution Setting).

- **Patient Billing – Working Batches** – Please be aware that working batches for Patient Billing will not be converted. Therefore, prior to loading this update it is recommended that you finalize or delete any working batches. After the update has been completed any working batches will still appear in the Reprint Patient Statement tab, however, if you try to access these batches a message will appear stating that the batch cannot be finalized and should be deleted and patient billing will need to be run again to collect these patient billing claims.

After Loading this Update, Please Read the Following Important Information, Regarding…

- **Backup Monitor —** With this release a Backup Monitor has been implemented to monitor your Database Snapshot. When configured, the Backup Monitor will automatically produce a warning message on every workstation that opens Practice Manager, if your Database Snapshot is more than 3 days old, allowing you to quickly remedy the backup configuration. When first logging into Practice Manager an initial message will appear explaining this new feature. See Figure 1. Have your office manager contact Practice Manager Support for further assistance. NOTE: If loading this update from Practice Manager version 2.9.2 or later, then you should have already configured the backup monitor; if you have not please contact Practice Manager Support.

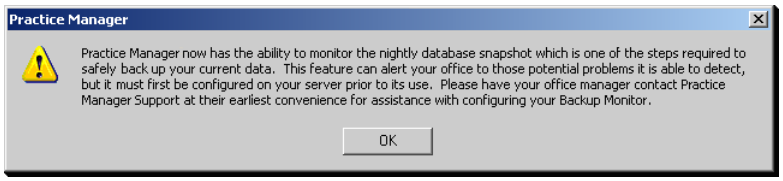

Figure 1 – Initial Database Snapshot Message

- **Practice Manager Upgrade Installation Instructions –** Refer to the Practice Manager Update Installation Instructions for additional information on removing and re-adding System Report Configurations, and running the Billing Component Manager.

After Loading this Update, Please Read the Following Important Information, Regarding…

- **Initial Login to Practice Manager** – After the update has completed, if you are updating from version 2.10.2 or a lower version, upon logging into the new 3.6 version of Practice Manager, all users will be prompted to change their password. Once the password is successfully changed you will then be logged into Practice Manager. The following section will walk you through this process. Note: if you are updating from a version higher than 2.10.2, you will not have to perform the following procedure.

  The first thing you will notice is that the program has been updated with a new dialog when logging into Practice Manager. See Figure 2. As before, you select the applicable database, enter your **User ID** and **Password** in the corresponding fields and then click the **Logon** button.

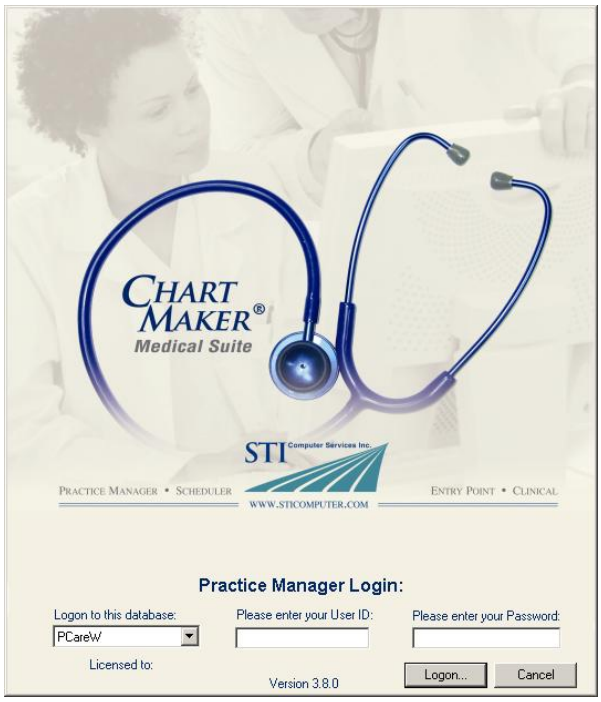

Figure 2 – Practice Manager Login

After you click the Logon button the system will tell you that your password has expired and you will be prompted to change your password. See Figure 3. Click the **Yes** button.

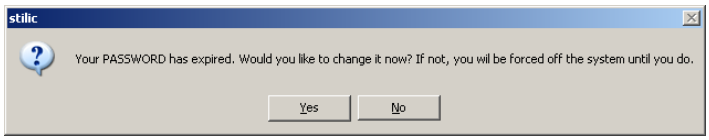

Figure 3 – Password Expiration Warning

In the Change Password dialog, enter your **Current Password**, your **New Password**, and **Confirm New Password** in the corresponding fields. See Figure 4. When finished click the **Save** button. Your new password will become activated and you will be logged into Practice Manager.

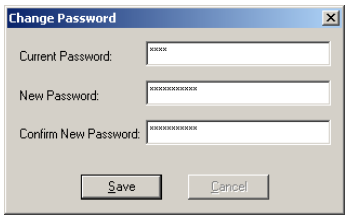

Figure 4 – Change Password

General

- **Audit System –** The Audit Trail has been updated so that When viewing audit information you have the ability to sort on a particular column-heading by clicking the appropriate heading (clicking a column heading once will sort the information in ascending order, while clicking a column heading twice will sort the information in descending order).

Messaging/Tasks

- **Messaging –** The Message Detail dialog has been updated with a Patient Requests Electronic Records option that allows you to specify if the selected patient is requesting an electronic copy of their patient record, and further allows you to then select the applicable **Provider** for that patient. When the Patient Requests Electronic Records option is selected the message/task will automatically be set as a Task and the system will trigger a request for the patient that can be satisfied by the applicable provider exporting an Electronic Copy of Health Record for the Patient in the Clinical application. To satisfy ARRA Report Measure the data must be exported within 3 business days.

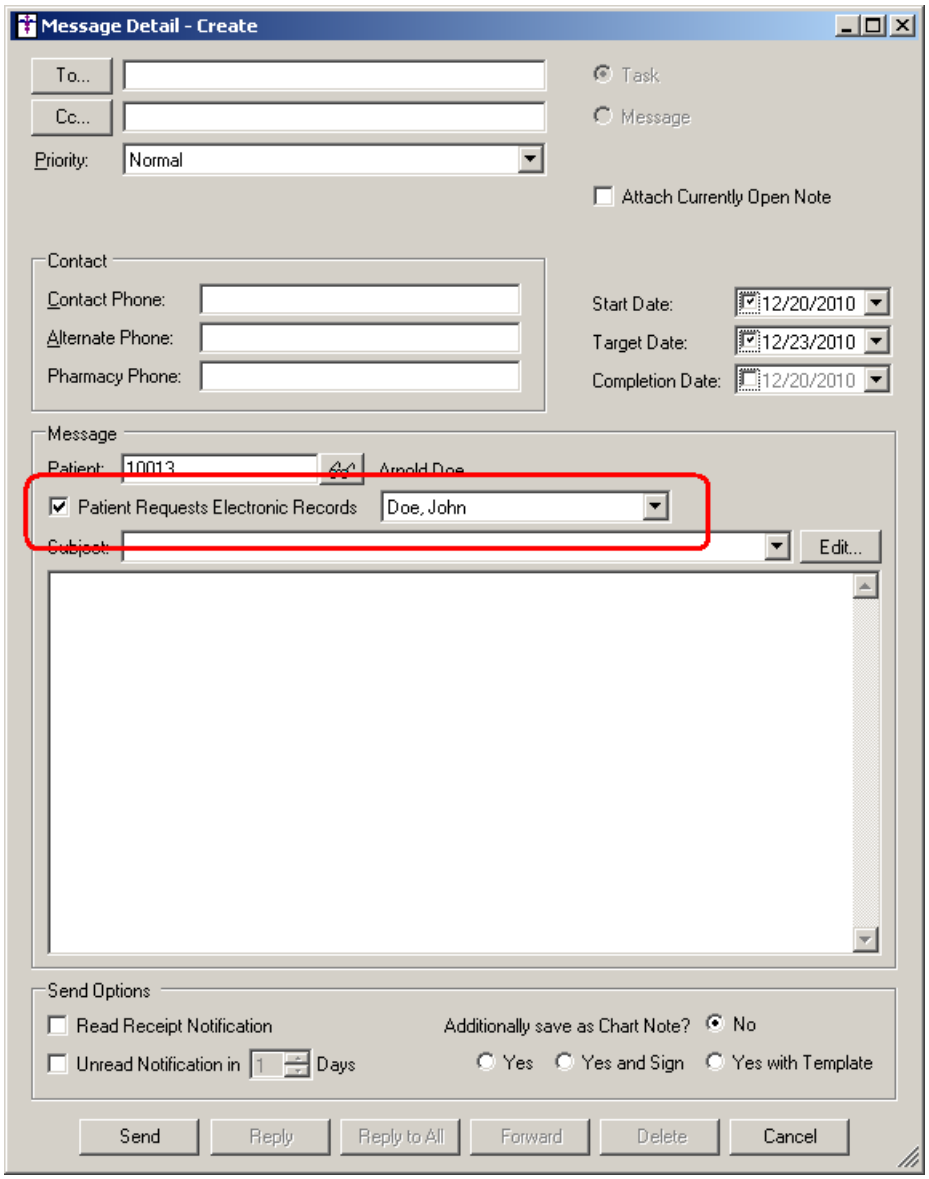

Figure 16 – The Message Detail Dialog

Patient

- **Patient → Additional Information** – The Additional Information section of the Patient tab has been updated with a Reminder Preference field that allows you to select how the patient wants to receive Preventive and Follow-Up Care communication from the provider. There are two options: Phone and Postal Mail.

Reports

Financial Reports

- **Account Receivables → Aged Patient Receivable –** This report has been updated with the ability to include the last Patient/Responsible Party Note in the report beneath the respective account when the Last RP/Patient Note option is selected in the Other Criteria tab when configuring this report. When this option is selected, you also have the ability to select the Note Category and Note Age for the patient or responsible party note.

Managed Care Reports

- **Encounter Analysis → NCQA Requirements –** A new NCQA Requirements report has been created to allow offices participating in a Patient Centered Medical Home to generate to meet and prove pre-defined criteria from NCQA in order to earn extra reimbursement from participating insurance companies for a specified date range. This report gives the percentage of encounters in a designated time frame that have the following items documented: Name, Date of Birth, Gender, Marital Status, Language Preference, Race/Ethnicity, Address, Telephone, E-Mail Address (or "none" for patients), Internal ID, External ID, Emergency Contact Information, Current and Past Diagnoses, Dates of Previous Clinical Visits, Billing Codes for Services, Legal Guardian, Health Insurance Coverage, and Patient/Family Preferred Method of Communication. In order to meet the maximum number of points, 12 out of the 18 items need to be documented and reported.