

Release Document for Update 5.2

Last Updated 12/11/2014

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ChartMaker® Practice Manager

General

• Administration – Diagnosis Search – The system has been updated with a Diagnosis Search tool (Administration > Diagnosis Search) that assists the transition of the ICD10 diagnostic implementation. In the Diagnosis Search dialog you are able to perform an ICD10 Search, an ICD9 Search, as well as utilize the Crosswalk functionality which allows you enter an ICD9 code and then the system will return the applicable ICD10 code(s) that match that initial ICD9 code. See Figure 1. When performing an ICD10 Search or using the Crosswalk options, the dialog will also contain a tree view (middle column) of the selected diagnosis, as well as a detail pane (right column) that further details the diagnosis. The Diagnosis Search functionality has been incorporated throughout the system wherever diagnosis codes are configured or utilized.

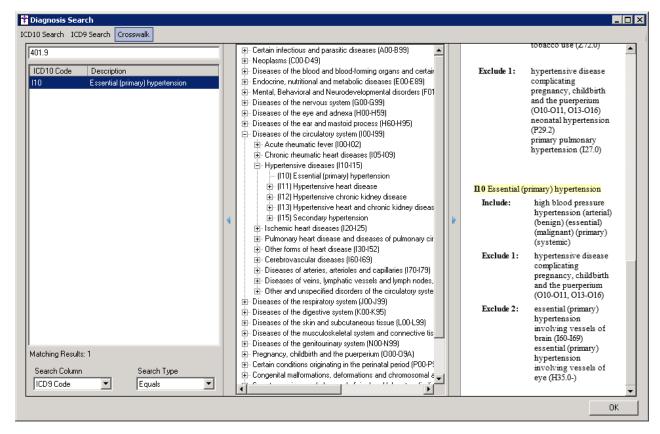


Figure 1 - Diagnosis Search

General (continued)

Administration – Transaction Tables – Diagnosis – The Diagnosis option in the Transaction Tables menu has been
updated to include options for either configuring ICD9 or ICD10 diagnosis codes. See Figure 2. Clicking the ICD9 option will
open the Diagnosis which is the same dialog used to configure ICD9 diagnosis information in legacy versions of Practice
Manager.

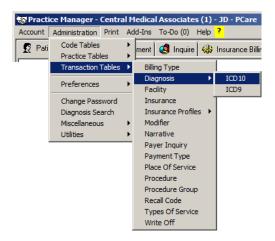


Figure 2 – Administration > Transaction Tables > Diagnosis

When clicking the ICD10 option, a new ICD10 dialog will appear, allowing you to search for ICD10 in the system. See Figure 3. When you click the lookup button the Diagnosis Search dialog will open, allowing you to search for the desired ICD10 code. See Figure 4. When in the ICD10 dialog, you are able to add Notes and Billing Codes for the selected ICD10 diagnosis code as needed.

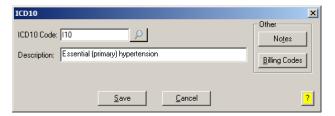


Figure 3 - Diagnosis - ICD10

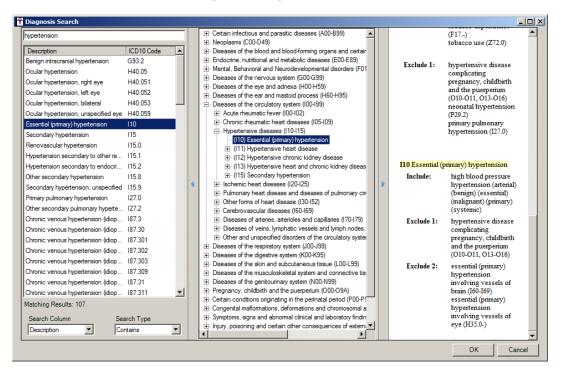


Figure 4 – Diagnosis – ICD10 – Diagnosis Search

General (continued)

• **PCADMIN** – The User Maintenance dialog in the Practice Manager for Windows Administration module has been updated to include a First, M (middle), and Last name fields allowing you to enter the user's full name in addition to their username. See Figure 5.

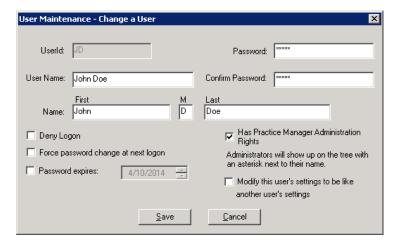


Figure 5 - PCADMIN - User Maintenance

- **PCImport** The PCImport module has been updated to handle ICD-10 diagnosis codes when these codes are in the file to be imported.
- STI ChartMaker Medical Suite Practice Manager Vaccine Registry The Vaccine Registry has been updated so that the Format field will contain and display the active vaccine registries in your system. See Figure 6. Likewise, you now have the ability to attach and configure Facility information for the applicable registries. When a Facility is attached you need to configure the Site ID for that facility linked to the vaccine registry by clicking Tools > Configure Site IDs.

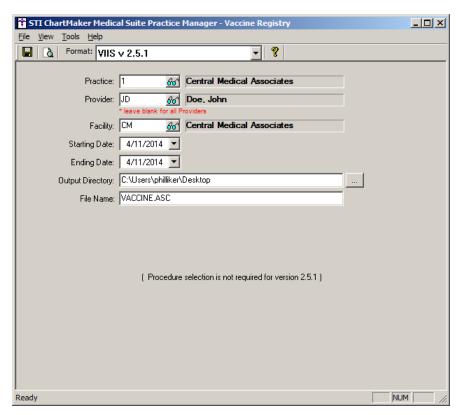


Figure 6 – STI ChartMaker Medical Suite Practice Manager – Vaccine Registry

General (continued)

STI ChartMaker Medical Suite Practice Manager – Vaccine Registry (continued)

In the Registry Configuration dialog, the Registry Format will default to what was selected in the Vaccine Registry dialog, however, you have the ability to select a different format if needed. See Figure 7. To add a Site ID, search for and select the applicable facility in the Office Location field, and then enter the Site ID. You can add multiple locations if needed. Once the applicable locations and Site IDs have been configured, be sure to select a Default.

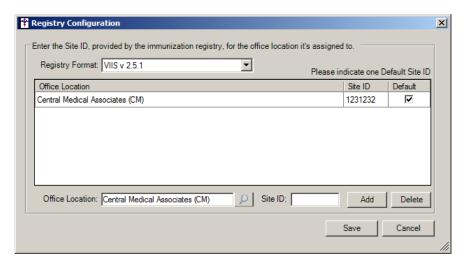


Figure 7 - Registry Configuration

Add-Ins

Add-Ins – Insurance Billing – Other Configurations – Configure ICD10 Readiness Date – The system has been updated with an Insurance Readiness dialog (Add-Ins > Insurance Billing > Other Configurations > Configure ICD10 Readiness Date) that allows you to configure a global readiness date for ICD-10. See Figure 8. You also have the ability to configure exceptions to this global date for Payor Organization IDs and for specific Insurances.

Do note that if you modify the **Global ICD10 Readiness Date** to something other than **10/1/2014**, it will affect ALL insurance carriers and could thereby delay or deny payments for applicable claims. It is recommended that you do not change this global date unless the ICD10 date has been postponed by CMS or the government. If the readiness date needs to be modified, use the exceptions area for Payor Organization or Insurance below.

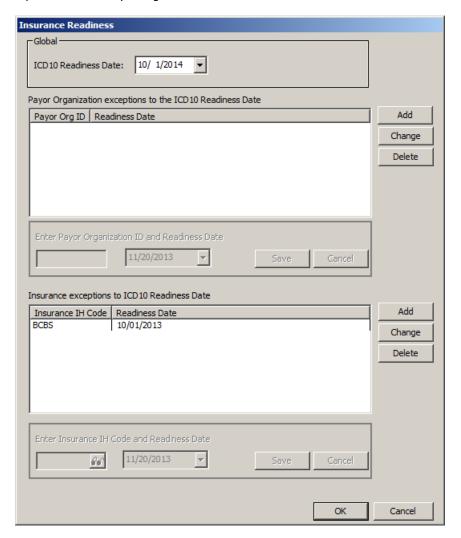


Figure 8 – Insurance Readiness

Letters → Procedure Letters - Procedure Letters have been updated to include ICD10, in addition to ICD9, diagnosis
codes and descriptions when applicable.

Charge

• **Charge – Diagnosis** – The Diagnosis area of the Charge screen has been updated with a new diagnostic control that allows you configure ICD9 and ICD10 codes when entering and editing charges for a patient. See Figure 9. As in previous versions, any codes that were attached to the patient's record in the Patient screen will default into the corresponding fields in the Charge screen. Once codes have been configured you can change their position by highlighting and using the arrow buttons, or remove them by highlighting and clicking the remove (red minus) button.

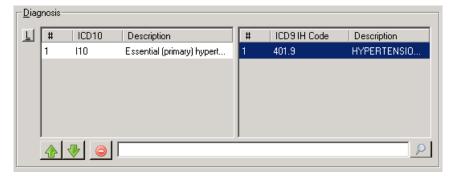


Figure 9 - Charge - Diagnosis

To add a diagnosis you can type a few letter of the diagnosis into the search field and then click the lookup button or press the F3 or F4 key. This accesses the Diagnosis Search dialog allowing you to perform an ICD10 Search, an ICD9 Search, as well as utilize the Crosswalk functionality which allows you enter an ICD9 code and then the system will return the applicable ICD10 code(s) that match that initial ICD9 code. See Figure 10. When performing an ICD10 Search or using the Crosswalk options, the dialog will also contain a tree view (middle column) of the selected diagnosis, as well as a detail pane (right column) that further details the diagnosis. Once a diagnosis is selected, it will appear in the Selected Codes section in the corresponding ICD10 or ICD9 column depending upon the type of code. You can add up to 10 diagnostic codes (five ICD10 code and five ICD9 codes).

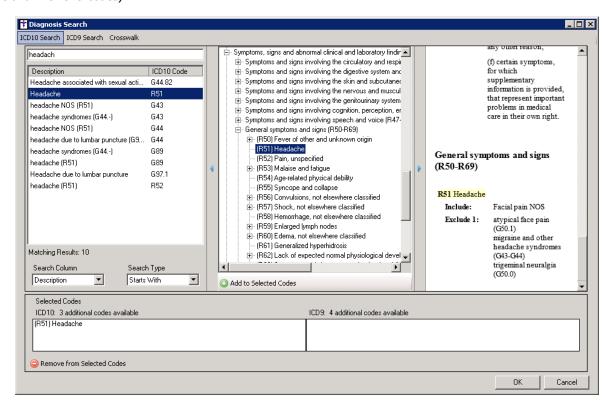


Figure 10 - Charge - Diagnosis - Diagnosis Search

Charge (continued)

• **Charge – Forms** – The Additional Forms dialog has been updated with a CMS-846 Pneumatic Compression Devices form that allows you to complete this form in conjunction with applicable charges and send that information electronically with those charges. See Figure 11.

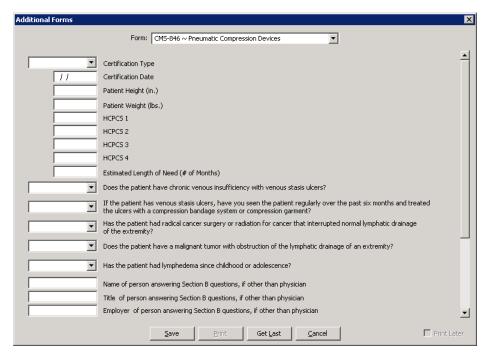


Figure 11 - Charge - Forms - Additional Forms

Clinical

• **Clinical – Immunization** – The Immunization Entry dialog has been updated with a Vaccination Information Statement section that allows you to select and configure Groups, VIS Documents and Presented dates for applicable vaccine procedures. See Figure 12. Multiple documents and dates can be configured when applicable.

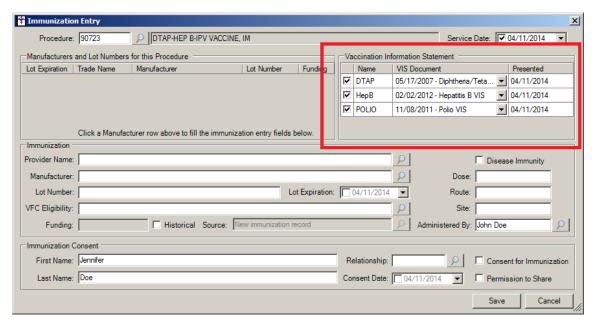


Figure 12 - Clinical - Immunization - Immunization Entry

Patient

• **Patient – Additional Information – Race** – The Race field has been updated to allow you to select multiple race codes for a patient. See Figure 13.

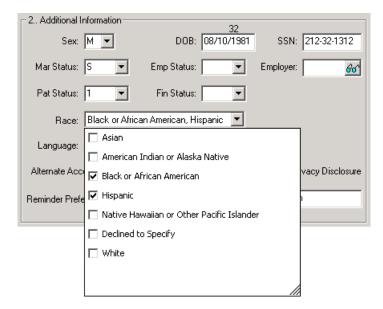


Figure 13 - Patient - Additional Information - Race

Patient – Case – Diagnosis – The Diagnosis area of the Patient screen has been updated with a new diagnostic control that
allows you configure ICD9 and ICD10 codes for a patient. See Figure 14. Once codes have been added you can change their
position by highlighting and using the arrow buttons, or remove them by highlighting and clicking the remove (red minus)
button.

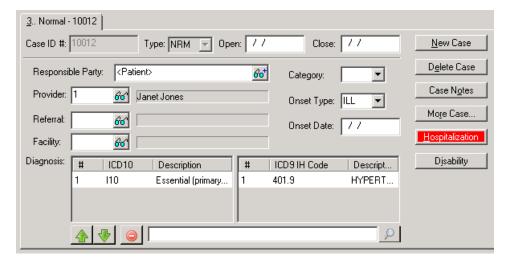


Figure 14 – Patient – Case – Diagnosis

To add a diagnosis you can type a few letter of the diagnosis into the search field and then click the lookup button or press the F3 or F4 key. This accesses the Diagnosis Search dialog allowing you to perform an ICD10 Search, an ICD9 Search, as well as utilize the Crosswalk functionality which allows you enter an ICD9 code and then the system will return the applicable ICD10 code(s) that match that initial ICD9 code. See Figure 15. When performing an ICD10 Search or using the Crosswalk options, the dialog will also contain a tree view (middle column) of the selected diagnosis, as well as a detail pane (right column) that further details the diagnosis. Once a diagnosis is selected, it will appear in the Selected Codes section in the corresponding ICD10 or ICD9 column depending upon the type of code. You can add up to 10 diagnostic codes (five ICD10 code and five ICD9 codes).

Patient (continued)

Patient - Case - Diagnosis (continued)

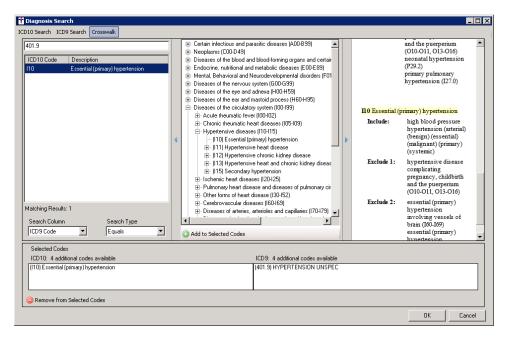


Figure 15 - Patient - Diagnosis Search

• **Patient – Other – Consent** – The Consent dialog has been updated with an Immunization section that allows you to configure Registry Status, Reminder Preference, and to Protect the immunization data from other clinicians, as well as the Effective Dates, when applicable. See Figure 16.

IMPORTANT IMMUNIZATION HL7 VERSION 2.5.1 INFORMATION: When sending immunization information to immunization registries in the H7 Version 2.5.1 format, you must access the Consent button (in either Practice Manager via the Patient screen, or in Clinical via the ID tab) for each applicable patient to configure whether or not the patient wants to share this information with the registry. This process replaces the **Consent for Immunization** and **Permission to Share** options in the Order Procedure dialog in Clinical, and the Immunization Entry dialog in Practice Manager, *for sending immunization information to registries in the 2.5.1 HL7 format.* Do note, however, that the **Consent for Immunization** option should still be configured at the procedure level (in the Order Procedure dialog in Clinical, and the Immunization Entry dialog in Practice Manager) to provide accurate documentation within the chart note and patient's record, when applicable.

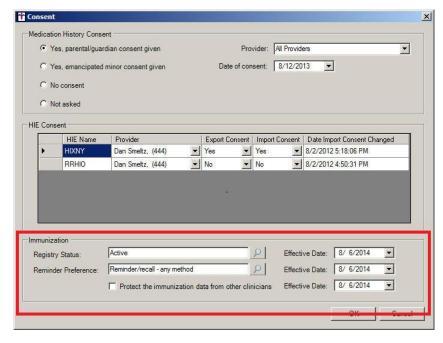


Figure 16 - Patient - Other - Consent

Documents

- Patient Account → Charge Slip The program has been updated to include ICD10, in addition to ICD9, diagnosis
 codes in the Charge Slip header when applicable.
- Patient Account → Diagnosis History The program has been updated to include ICD10, in addition to ICD9, diagnosis codes on the diagnosis history report when applicable.
- **Patient Account** → **Lab Sheet** The program has been updated to allow you to include and configure ICD10, in addition to ICD9, diagnosis codes for a lab sheet when applicable.
- Patient Account → Patient History The program has been updated to include ICD10, in addition to ICD9, diagnosis codes on the patient history report when applicable.
- Patient Account/RP Account → Itemized Charges The program has been updated to include ICD10, in addition to ICD9, diagnosis codes on the itemized charges document when applicable.
- Patient Account/RP Account → Receipt The program has been updated to include ICD10, in addition to ICD9, diagnosis codes on the receipt when applicable.
- Patient Account/RP Account → Statement The program has been updated to include ICD10, in addition to ICD9, diagnosis codes on the statement when applicable.
- Patient Account/RP Account → Summary The program has been updated to include ICD10, in addition to ICD9, diagnosis codes on the summary document when applicable.

Labels

- Mailing Labels Case Labels The program has been updated to include ICD10, in addition to ICD9, diagnosis codes
 on the case labels when applicable. Likewise, you also have the ability to sort or select with ICD9 or ICD10 diagnosis
 codes as needed.
- Mailing Labels Charge Labels The program has been updated to include ICD10, in addition to ICD9, diagnosis
 codes on the charge labels when applicable. Likewise, you also have the ability to sort or select with ICD9 or ICD10
 diagnosis codes as needed.

Patient Billing

• **Patient Billing** — The program has been updated to include ICD10, in addition to ICD9, diagnosis codes on the electronic and paper patient statements whenever such codes are configured for the applicable charges.

Reports

Reports — All applicable reports that display diagnosis codes have been updated to print ICD10 (and/or ICD9) diagnosis
codes when applicable. Likewise, reports that sort or select on diagnosis codes have been updated so that you can
sort/select with ICD9 or ICD10 diagnosis codes as needed.

Addendum

Medicare PQRS Incentive Program Reminder

In the version 3.3 release of Practice Manager, there were two important enhancements that were made that allow you to effectively flag applicable PQRS procedures to be sent to participating insurances to receive applicable incentive moneys through the Medicare PQRS (Physician Quality Reporting System) Incentive Program. These enhancements entailed creating a new Quality Measure field in the Procedure dialog and the Insurance dialog. Details of these changes from the Practice Manager 3.3 Release Notes document, along with some additional information about configuring G-Codes, are below. See the Practice Manager help for further details on the respective programs and additional configuration options utilizing the Clinical application.

Administration → Transaction Tables → Procedure – The Procedure dialog has been updated with a Quality
Measure checkbox that allows you to flag a procedure as a quality reporting measure for PQRS. See Figure A1. When a
procedure is flagged as Quality Measure, the system will only bill charges for that procedure to insurances that are also
flagged as Quality Measure. This ensures that the applicable PQRS procedures are only billed to participating insurances.

To enter a PQRS procedure enter the applicable **Code** in the IH Code field. That code will then default into the CPT4 Code field. Next, in the Description field, enter an appropriate **Description**. In the Amount field, enter the **0.00**. In the TOS field, enter the applicable Type of Service, or search for it by clicking the Lookup button, or pressing F3. In the POS field, enter the applicable Place of Service, or search for it by clicking the Lookup button, or pressing F3. Check the **Quality Measure** option to flag this procedure as a quality reporting measure. When finished, click the **Save** button.

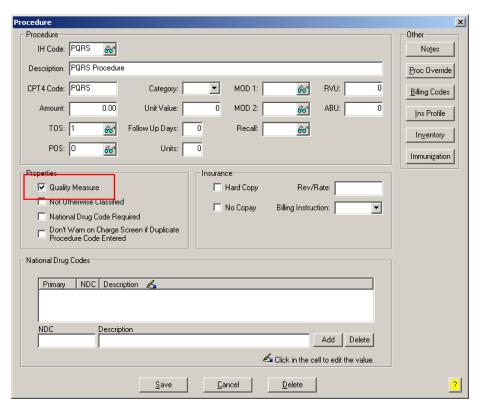


Figure A1 – Procedure

Medicare PQRS Incentive Program Reminder (continued)

• Administration → Transaction Tables → Insurance – The Insurance dialog has been updated with a Quality Measure checkbox that allows you to flag an Insurance carrier as a quality reporting measure for PQRS. See Figure A2. When a procedure is flagged as Quality Measure, the system will only bill charges for that procedure to insurances that are also flagged as Quality Measure. This ensures that the applicable PQRS procedures are only billed to participating insurances.

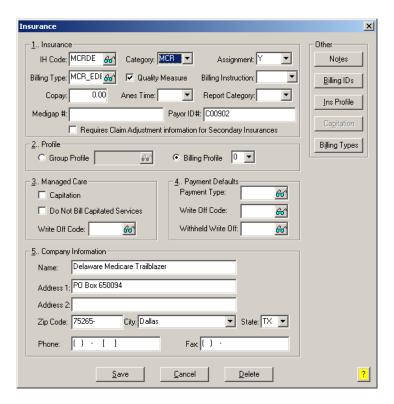


Figure A2 – Insurance Dialog

Insurance Billing Updates Reminder

In the version 4.1 release of Practice Manager, there was an important enhancement that was made to the Insurance Billing screen to alert you whenever a new insurance billing update is available. Once alerted you can then download these updated billing components at your convenience. Do note that if you are running the 4.1 version of Practice Manager, the update process needs to be performed on the server.

In the version 4.2 release of Practice Manager, the system was updated so that billing components reside on each individual workstation. Therefore, if you are running the 4.2 version or higher of Practice Manager, the update process (described below) will need to be initiated for each workstation that will be doing insurance billing. If the updates are not downloaded and registered on each workstation that will be doing insurance billing, then claims generated for those workstations may be denied if they are not updated.

Insurance Billing Updates – The Insurance Billing tab has been updated with an Update button that allows you to
download the latest insurance billing components if new components are available. See Figure A3. An Update button is
available in both the Manual Billing and Automatic Billing sub-tabs and will become highlighted to alert you when new
billing components are available.

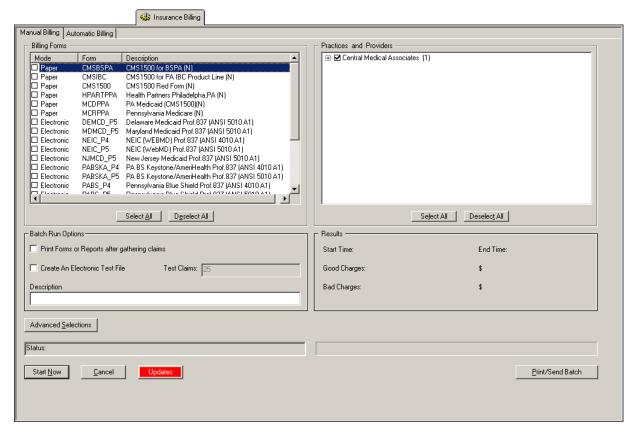


Figure A3 - Insurance Billing - Manual Billing

Once the download is initiated by clicking the **Updates** button, another dialog will appear confirming that you want to download and install the latest billing updates. See Figure A4.

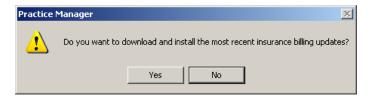


Figure A4 - Insurance Billing Updates Download

Insurance Billing Updates Reminder (continued)

Once the **Yes** button is clicked the insurance billing updates will start to download and the following message will appear in Figure A5. Do note that once the billing updates are initiated by a user, the Updates button will disable for all users and other users who try to initiate the download will receive a message stating that updates have started from another machine. Once the updates have been downloaded you will be prompted to install the updates, as well as to close out of the Practice Manager application to ensure a successful update.



Figure A5 – Insurance Billing Updates Download Confirmation

Once the updates have been successfully downloaded and installed, log back into Practice Manager and be sure to register the Billing Component Manager (Add-Ins > Insurance Billing > Billing Component Manager).

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