

ChartMaker® Practice Manager

Add-Ins

- Practice Dashboard** – The program has been updated with a new configurable business-focused reporting dashboard (Add-Ins > Practice Dashboard) that summarizes Accounts Receivable, Gross Revenue, Net Revenue, Inventory Usage, Patient Tracking, and Patient Visit information in an easily viewable dialog. See Figure 1. Each tile within the dashboard can be easily configured with any of these categories, while each category contains a variety of different options and can be labeled with appropriate descriptors to meet your practice’s needs and to provide diverse scope of your practice’s business health at a glance.



Figure 1 – Practice Dashboard

Administration

- **Administration – Registry – Immunization – Configuration** – The program has been updated with a new Registry option that is available via the Administration menu that allows you to easily configure registry information for vaccine registries and formats. See Figure 2.

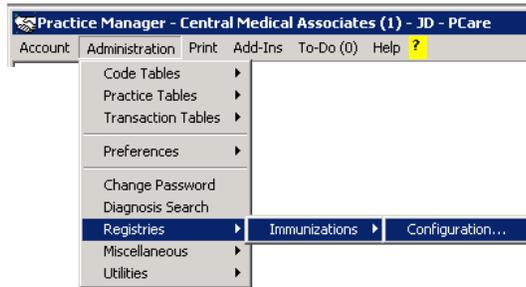


Figure 2 – Administration > Registries > Immunizations > Configuration

In the Registry Configuration dialog you have the ability to set up Office Location and Site ID information for each Registry Format for those formats that do not support bidirectional functionality, while also setting up Bidirectional Credentials (Practice, User ID, and Password) for those that do. See Figure 3. This Registry Configuration dialog can also be accessed via the Vaccine Registry module via the Tools menu (Tools > Configure Site IDs).

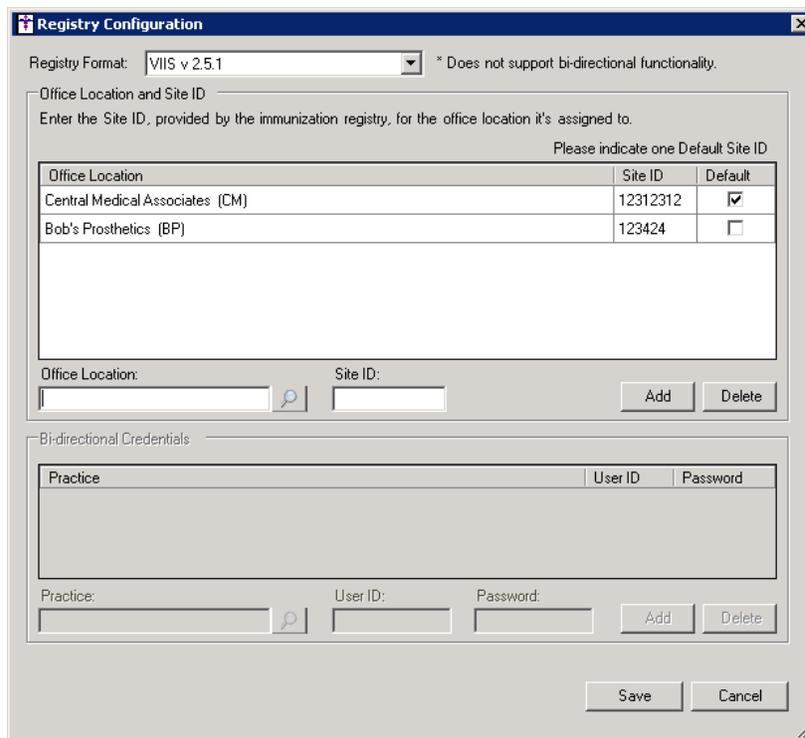


Figure 3 – Registry Configuration

Clinical

- **Clinical – Immunization** – The Dose, Route, and Site fields in the Immunization section of the Immunization Entry dialog has been updated so you are able to search for applicable options for those fields. See Figure 4.
- **Clinical – Immunization** – The Immunization section of the Immunization Entry dialog has been updated so that when an immunization procedure is performed, you have the ability to add a Facility for that immunization. See Figure 4.

Lot Expiration	Trade Name	Manufacturer	Lot Number	Funding

Name	VIS Document	Presented
<input checked="" type="checkbox"/> DTAP	05/17/2007 - Diphtheria/Tetanus/Pertus...	05/21/2014
<input checked="" type="checkbox"/> HIB	12/16/1998 - Haemophilus Influenzae typ...	05/21/2014
<input checked="" type="checkbox"/> POLIO	11/08/2011 - Polio VIS	05/21/2014

Figure 4 – Clinical – Immunization – Immunization Entry

General

- **STI ChartMaker Medical Suite Practice Manager – Vaccine Registry** – The Vaccine Registry module has been updated so that a message will be generated whenever you try to create a vaccine registry file and there is bad data in that file. You will then have the ability to View the Invalid Data Report, Continue (without viewing the data), or Cancel. The Invalid Data Report can also be accessed prior to creating a file via the Tools menu (Tools > Invalid Data Report). See Figure 5.

Practice: 1 Central Medical Associates
Provider: JD Doe, John
* leave blank for all Providers
Facility:
Starting Date: 4/11/2014
Ending Date: 4/11/2014
Output Directory: C:\Users\philliker\Desktop
File Name: VACCINE.ASC

(Procedure selection is not required for version 2.5.1)

Figure 5 – STI ChartMaker Medical Suite Practice Manager – Vaccine Registry

Patient

- **Patient – Additional Information – Email** – The Email field in the Patient Portal section of the Patient Representative dialog has been updated to validate that email addresses are entered in the correct format. If an email address is not entered correctly, a warning message will appear indicating the email address is not in the correct format. See Figure 6.

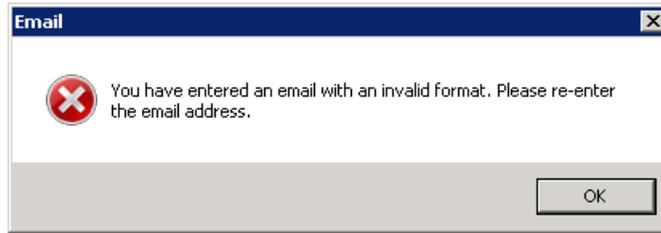


Figure 6 – Order Procedure

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.

The screenshot shows the 'Procedure' dialog box with the following fields and sections:

- Procedure:** IH Code: PQRS, Description: PQRS Procedure, CPT4 Code: PQRS, Category: [dropdown], MOD 1: [spin], RVU: 0, Amount: 0.00, Unit Value: 0, MOD 2: [spin], ABU: 0, TOS: 1, Follow Up Days: 0, Recall: [spin], POS: 0, Units: 0.
- Other:** Notes, Proc Override, Billing Codes, Ins Profile, Inventory, Immunization.
- Properties:** Quality Measure, Not Otherwise Classified, National Drug Code Required, Don't Warn on Charge Screen if Duplicate Procedure Code Entered.
- Insurance:** Hard Copy, Rev/Rate: [spin], No Copay, Billing Instruction: [dropdown].
- National Drug Codes:** Table with columns Primary, NDC, Description. Includes Add and Delete buttons.
- Buttons:** Save, Cancel, Delete, and a help icon (?) in the bottom right.

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.

The screenshot shows the 'Insurance' dialog box with the following sections and fields:

- 1. Insurance:**
 - IH Code: MCRDE
 - Category: MCR
 - Assignment: Y
 - Billing Type: MCR_EDT
 - Quality Measure
 - Billing Instruction: [dropdown]
 - Copay: 0.00
 - Anes Time: [dropdown]
 - Report Category: [dropdown]
 - Medigap #: [text]
 - Payor ID#: C00902
 - Requires Claim Adjustment information for Secondary Insurances
- 2. Profile:**
 - Group Profile
 - Billing Profile: 0
- 3. Managed Care:**
 - Capitation
 - Do Not Bill Capitated Services
 - Write Off Code: [text]
- 4. Payment Defaults:**
 - Payment Type: [text]
 - Write Off Code: [text]
 - Withheld Write Off: [text]
- 5. Company Information:**
 - Name: Delaware Medicare Trailblazer
 - Address 1: PO Box 650094
 - Address 2: [text]
 - Zip Code: 75265- [text]
 - City: Dallas
 - State: TX
 - Phone: [text] - [text]
 - Fax: [text] - [text]

Buttons: Save, Cancel, Delete, and a Help icon (?) are located at the bottom.

Other buttons on the right: Notes, Billing IDs, Ins Profile, Capitation, Billing Types.

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.

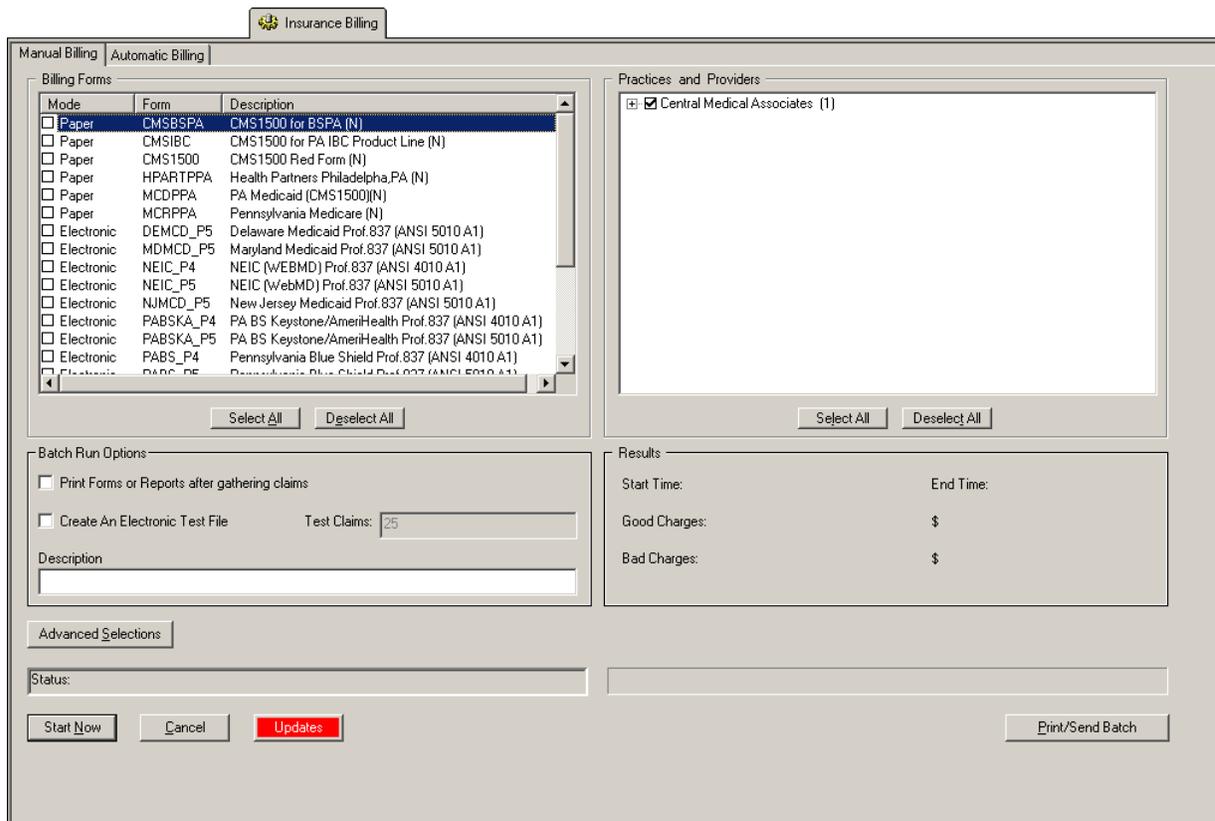


Figure A3 – Insurance Billing – Manual Billing

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.

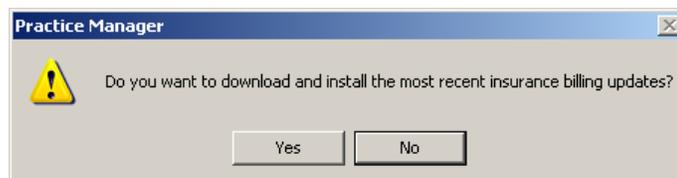


Figure A4 – Insurance Billing Updates Download

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.

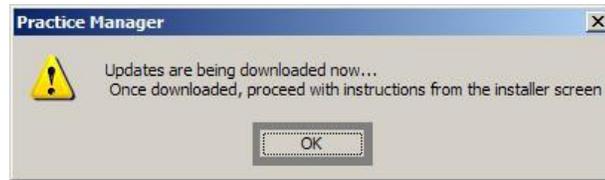


Figure A5 – Insurance Billing Updates Download Confirmation

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

Immunization Consent Reminder for HL7 2.5.1 Format

In the version 5.2 release of the ChartMaker Medical Suite (Clinical and Practice Manager), there was an important enhancement that was made to the Consent dialog to that allows you to configure patient consent regarding immunization information when sending immunization data to registries in the HL7 2.5.1 format. For all 2.5.1 Immunization programs Consent information is now set at the patient level.

The Consent dialog is accessed:

- In **Clinical**: Open Chart > ID Tab > Consent button
- In **Practice Manager**: Patient > Enter Acct # > Consent button.

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 A6.

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.

The screenshot shows a 'Consent' dialog box with three main sections:

- Medication History Consent:** Includes radio buttons for 'Yes, parental/guardian consent given', 'Yes, emancipated minor consent given', 'No consent', and 'Not asked'. It also has a 'Provider' dropdown menu set to 'All Providers' and a 'Date of consent' dropdown menu set to '8/12/2013'.
- HIE Consent:** A table with columns: HIE Name, Provider, Export Consent, Import Consent, and Date Import Consent Changed. The table contains two rows:

HIE Name	Provider	Export Consent	Import Consent	Date Import Consent Changed
HIXNY	Dan Smeltz, (444)	Yes	Yes	8/2/2012 5:18:06 PM
RRHIO	Dan Smeltz, (444)	No	No	8/2/2012 4:50:31 PM
- Immunization:** This section is highlighted with a red box. It includes:
 - 'Registry Status' dropdown menu set to 'Active'.
 - 'Reminder Preference' dropdown menu set to 'Reminder/recall - any method'.
 - A checkbox for 'Protect the immunization data from other clinicians' which is currently unchecked.
 - Three 'Effective Date' dropdown menus, all set to '8/ 6/2014'.

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Figure A6 –Consent

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

