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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.

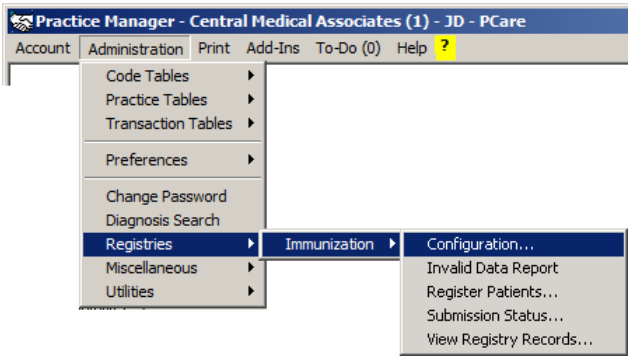

Figure 2 – Administration > Registries > Immunizations > Configuration

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. Likewise, in the Instructions for Sending Immunizations you are able to specify whether you are sending immunizations to the registry as production or as a test, as well as a service date that immunizations should not be sent prior to. See Figure 3. This Registry Configuration dialog can also be accessed via the Vaccine Registry module via the Tools menu (Tools > Configure Site IDs).

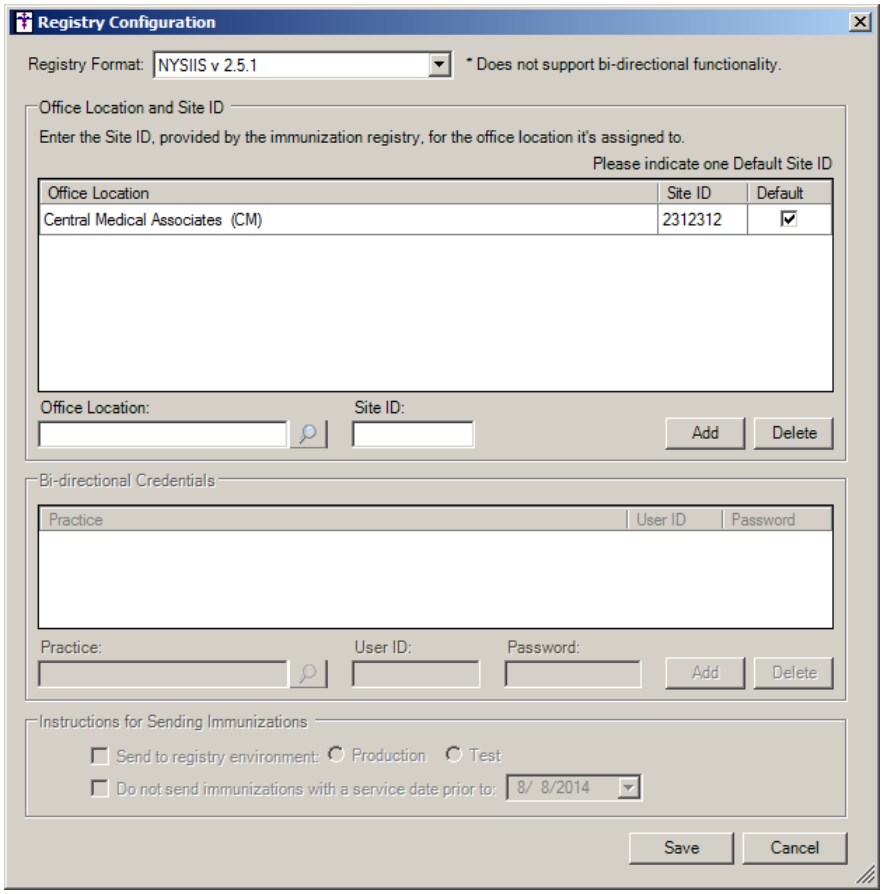

Figure 3 – Registry Configuration

Administration (continued)

- **Administration – Registry – Immunization – Invalid Data Report** – The program has been updated with a new Registry option that is available via the Administration menu that allows you to easily run the Invalid Data Report to view bad data in a vaccine registry file. See Figure 4.

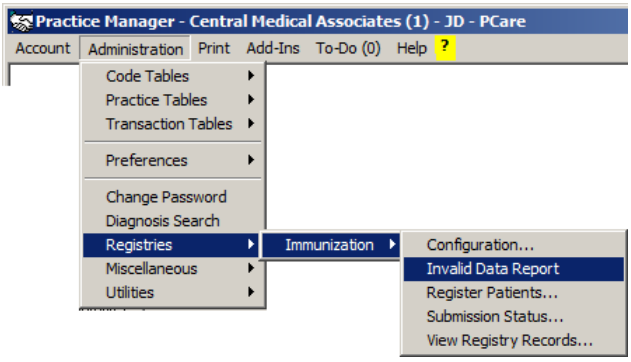

Figure 4 – Administration > Registries > Immunizations > Invalid Data Report

In the Report Viewer dialog you can view, export, print and copy the invalid data. See Figure 5. This Invalid Data Report option can also be accessed via the Vaccine Registry module via the Tools menu (Tools > Invalid Data Report).

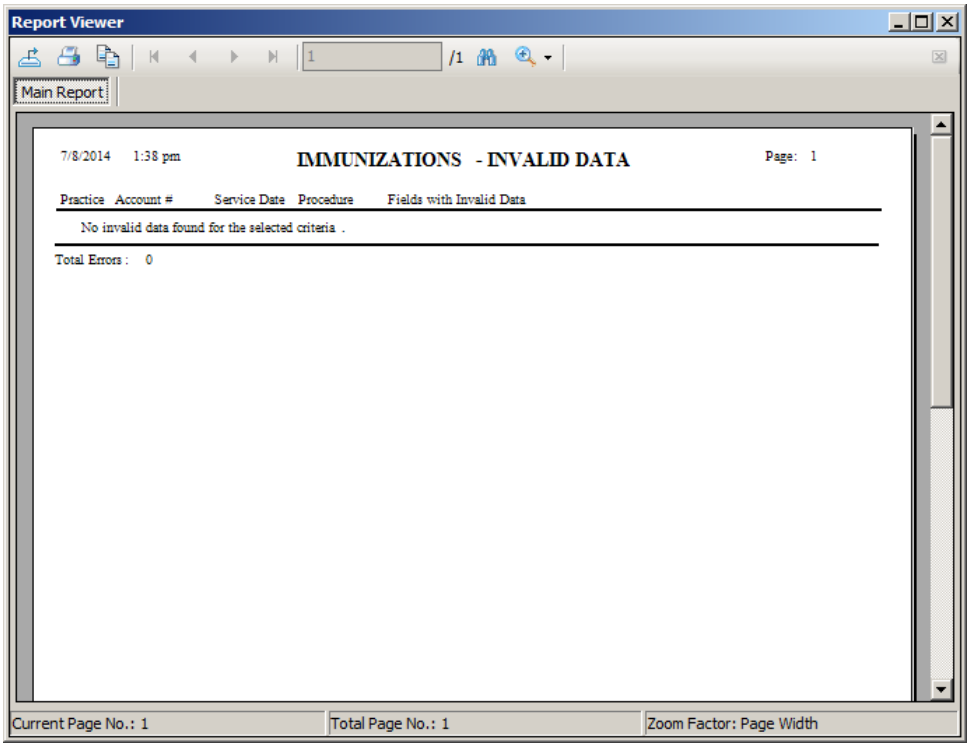

Figure 5 – Report Viewer

Administration (continued)

- **Administration – Registry – Immunization – Register Patient** – The program has been updated with a new Registry option that is available via the Administration menu that allows you to easily register the patient for bidirectional transmission to vaccine registries. See Figure 6. The registry needs to be configured (via Administration > Registry > Immunization > Configuration) for bidirectional transmission prior to registering patients.

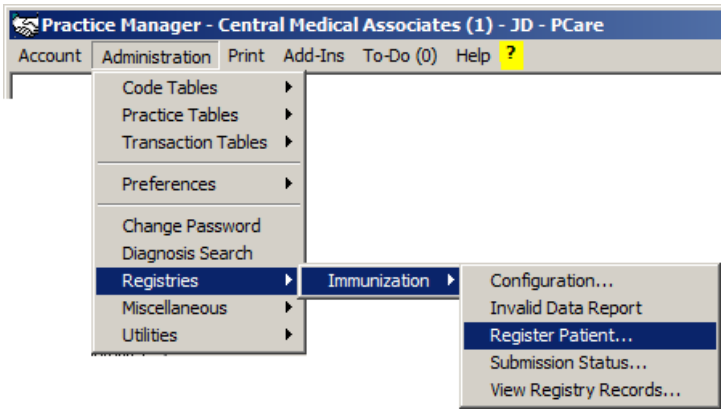

Figure 6 – Administration > Registries > Immunizations > Register Patients

In the Register Patient dialog you have the ability search for the patient you want to register. Do note that Name and DOB are required. If these items are not currently configured for the patient, then you need to update that information prior to registering. Once all of the applicable information is displayed as desired, you can click the Submit button to register the patient. See Figure 7.

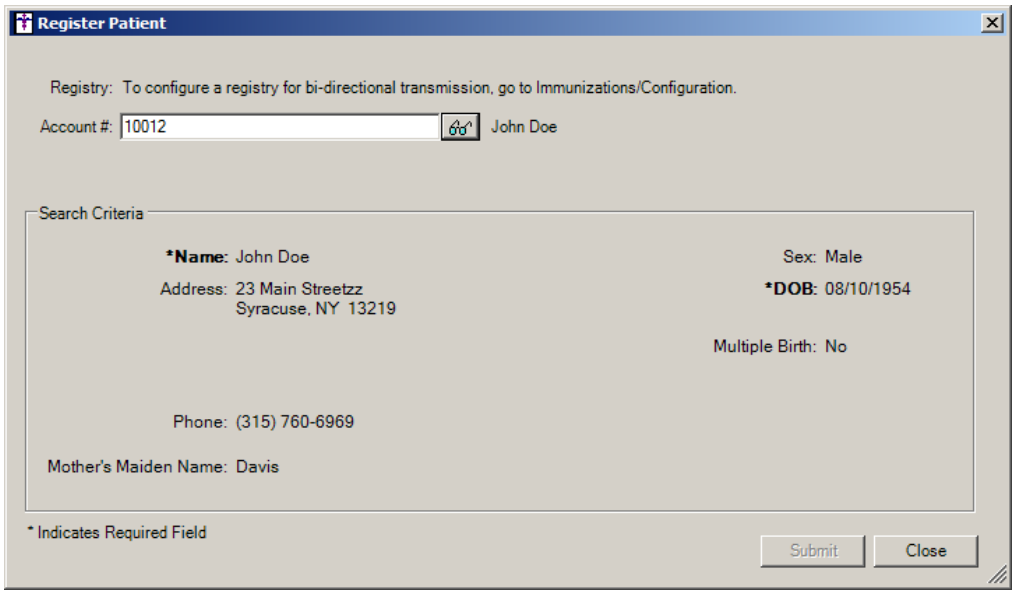

Figure 7 – Registry Configuration

Administration (continued)

- **Administration – Registry – Immunization – Submission Status** – The program has been updated with a new Registry option that is available via the Administration menu that displays the submission status of immunizations to each registry. See Figure 8.

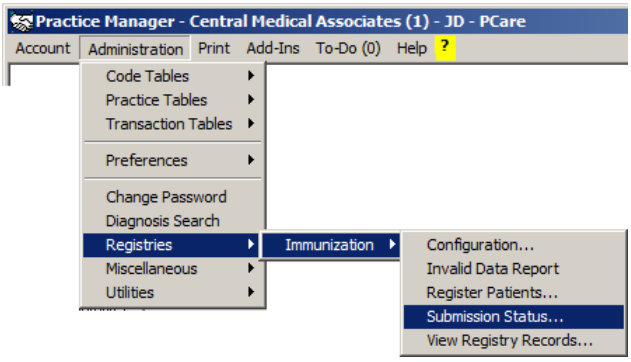

Figure 8 – Administration > Registries > Immunizations > Submission Status

In the Submission Status dialog you have the ability to filter the results of the submission status by Account # (for a single patient), Practice, Status (<All>, Connection Error, Excluded, Failed, Invalid Data, Not Registered, Not Sent, and Successful), and Send From/To date range. See Figure 9. This Submission Status dialog can also be accessed via the Submission Status button in the Clinical > Immunizations screen.

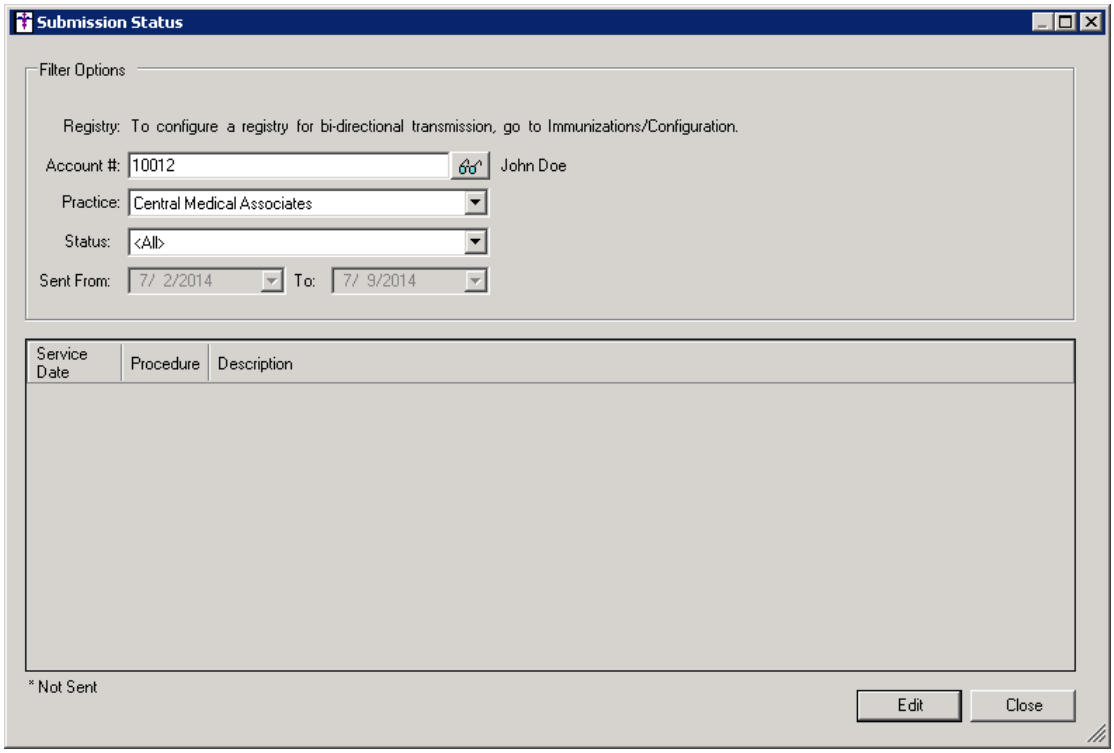

Figure 9 – Submission Status

Administration (continued)

- **Administration – Registry – Immunization – View Registry Records** – The program has been updated with a new Registry option that is available via the Administration menu that allows you to download and view registry records for a patient. See Figure 10.

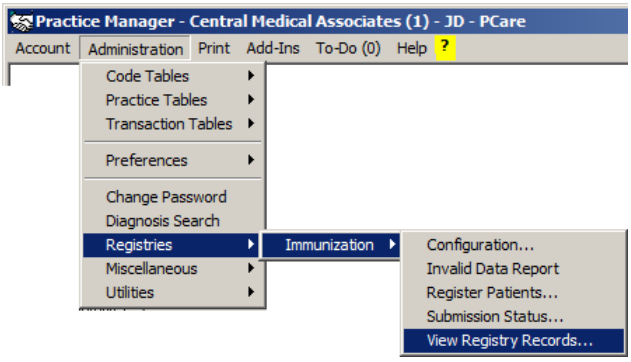

Figure 10 – Administration > Registries > Immunizations > View Registry Records

In the Registry Records dialog once the patient's account number has been entered you have the ability download any applicable registry records by clicking the Download button. After the reports have been downloaded, they will be displayed below and you can print, delete, and refresh these records as needed by clicking the corresponding button. See Figure 11.

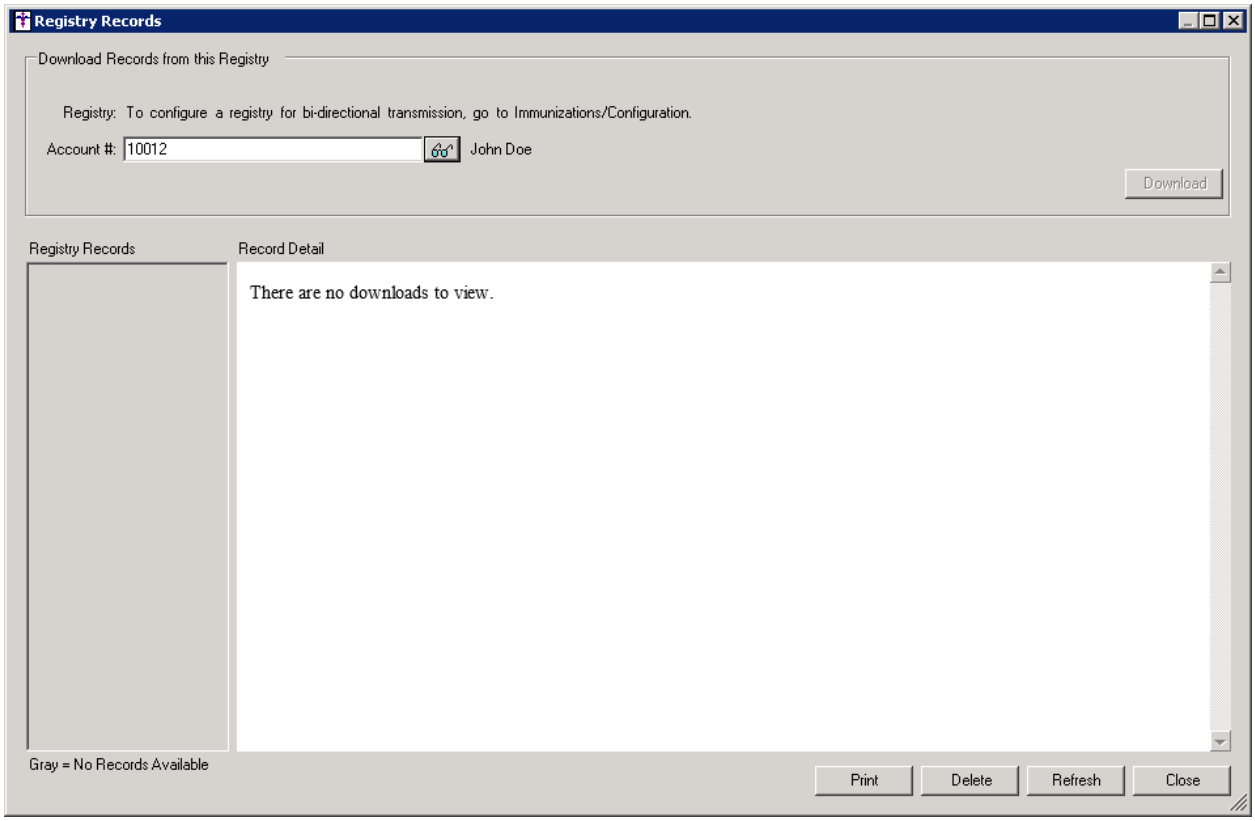

Figure 11 – Registry Configuration

Clinical

- **Clinical – Immunization** – The program has been updated so that immunization records are sent to each active registry that is capable of bi-directional transmission whenever immunization information is added or modified for a patient, and that information has been saved when the Next Account button is clicked.

- **Clinical – Immunization** – The Immunization tab of the Clinical screen has been updated with a Submission Status button that allows access to the Submission Status dialog that displays the submission status of immunizations to each registry. See Figure 12.

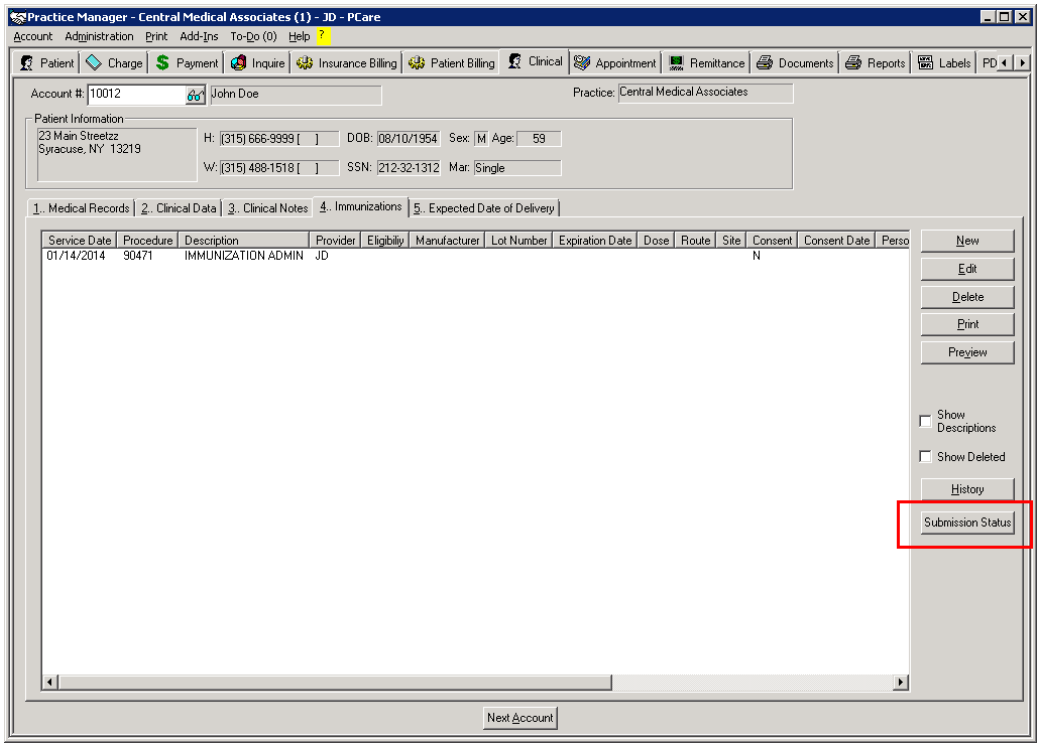

Figure 12 – Clinical – Immunizations

In the Submission Status dialog you have the ability to filter the results of the submission status by Account # (for a single patient), Practice, Status (<All>, Connection Error, Excluded, Failed, Invalid Data, Not Registered, Not Sent, and Successful), and Send From/To date range. See Figure 13. This Submission Status dialog can also be accessed via Administration > Registry > Immunization > Submission Status.

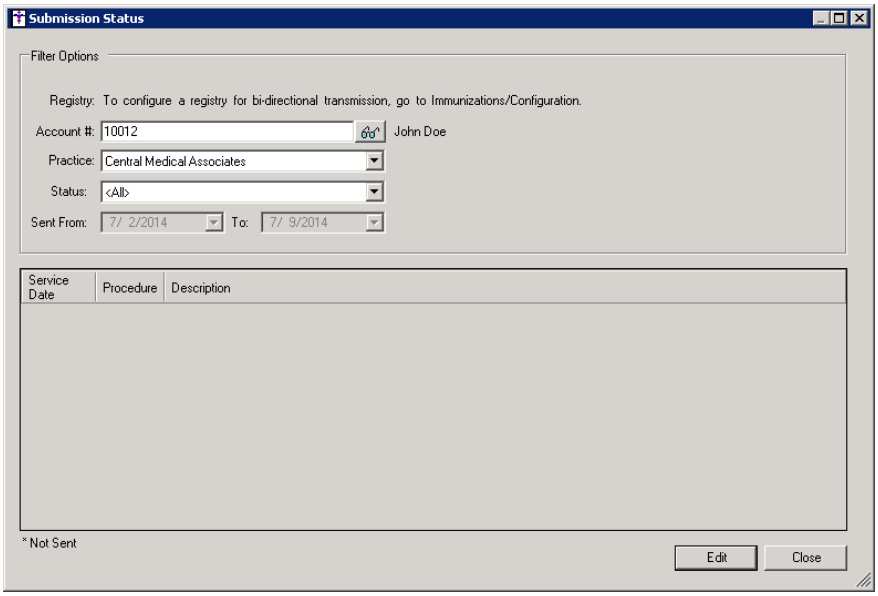

Figure 13 – Submission Status

Reports

Clinical Reports

- **Clinical Immunizations → Unregistered Patients –** A new report has been created that will display the patients that have immunizations entered, but are not registered with an active registry. This report will contain the following information: Account Number, Practice, Patient, Provider, Service date, Procedure; and will be grouped by immunization registry.

Managed Care Reports

- **RVU Analysis → Detail –** This report has been updated with the ability to sort and select by Charge End Date.

- **RVU Analysis → Summary –** This report has been updated with the ability to sort and select by Charge End Date.

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.

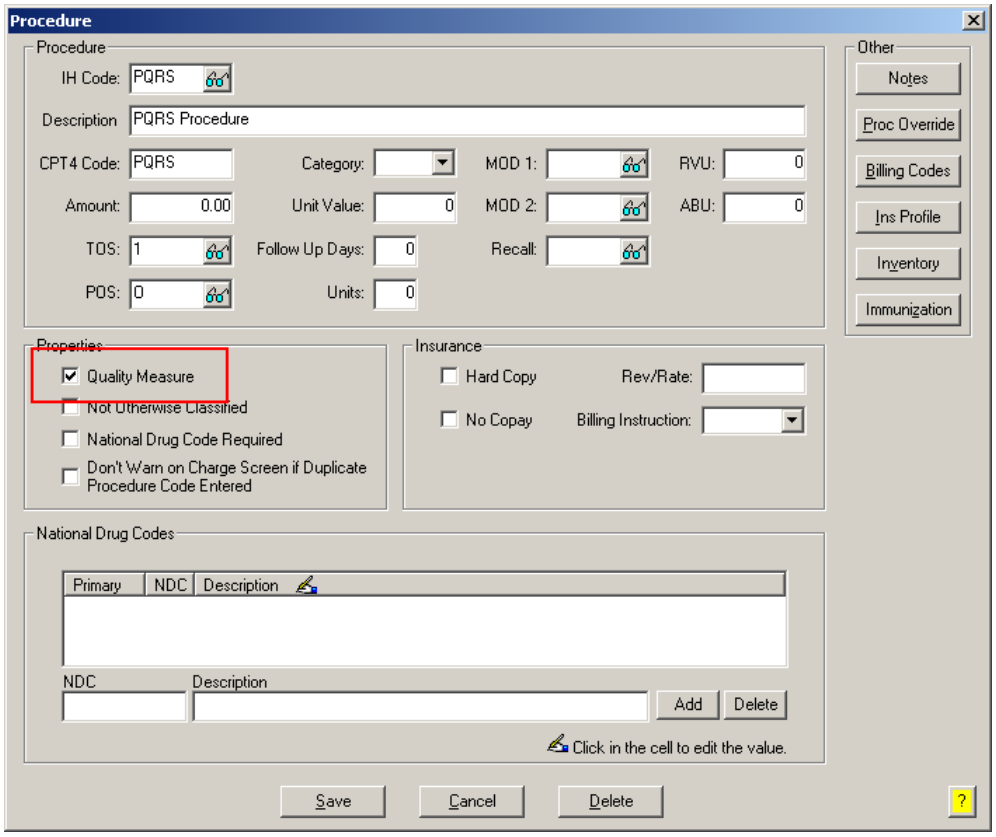

Figure A1 – Procedure

- **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.

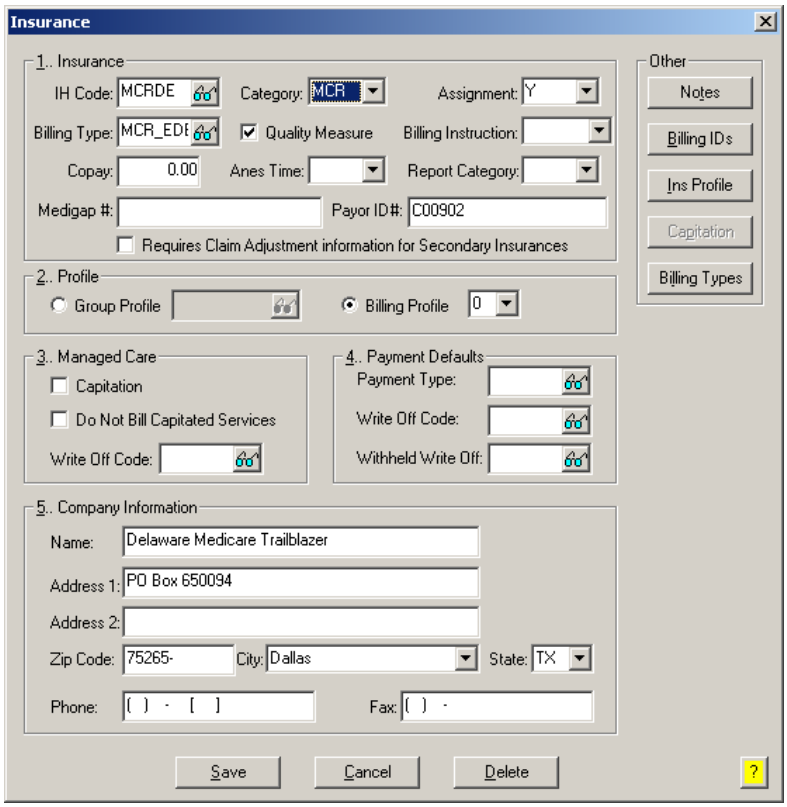

Figure A2 – Insurance Dialog

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.

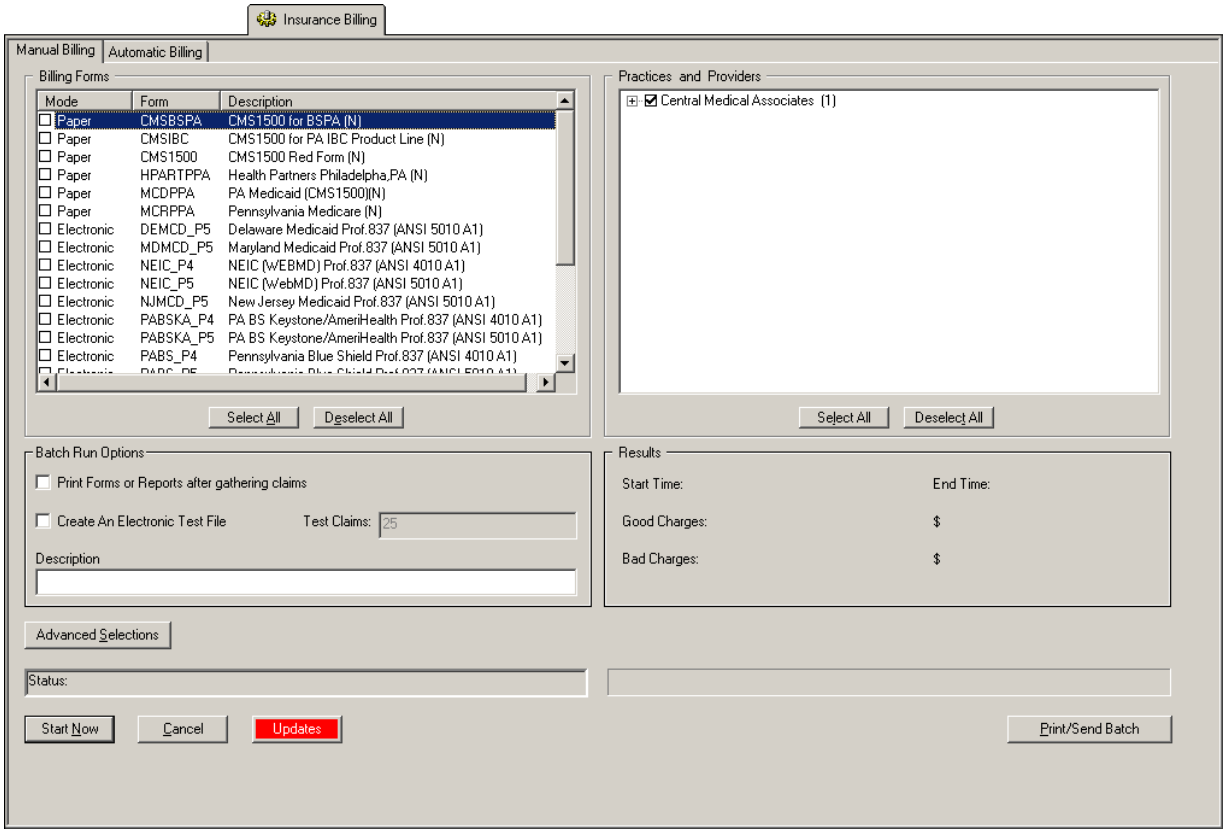

Figure A3 – Insurance Billing – Manual Billing

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.

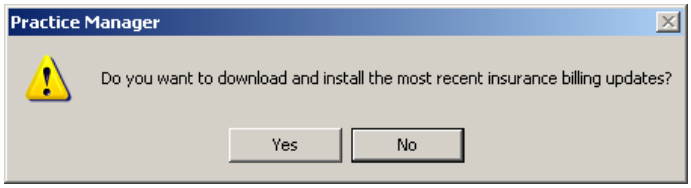

Figure A4 – Insurance Billing Updates Download

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.

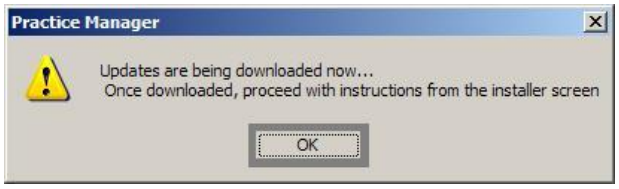

Figure A5 – Insurance Billing Updates Download Confirmation

Once the updates have been successfully downloaded and installed, log back into Practice Manager and be sure to register the Billing Component 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.

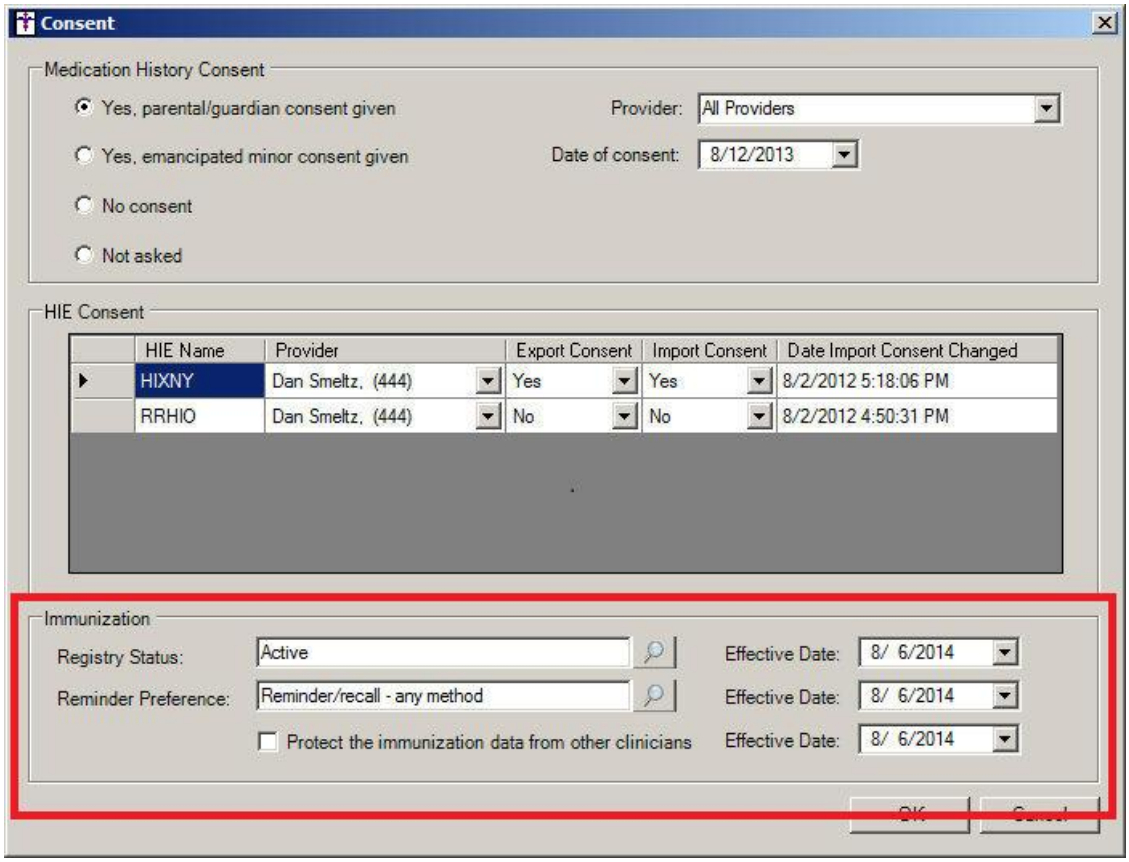

Figure A6 –Consent

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