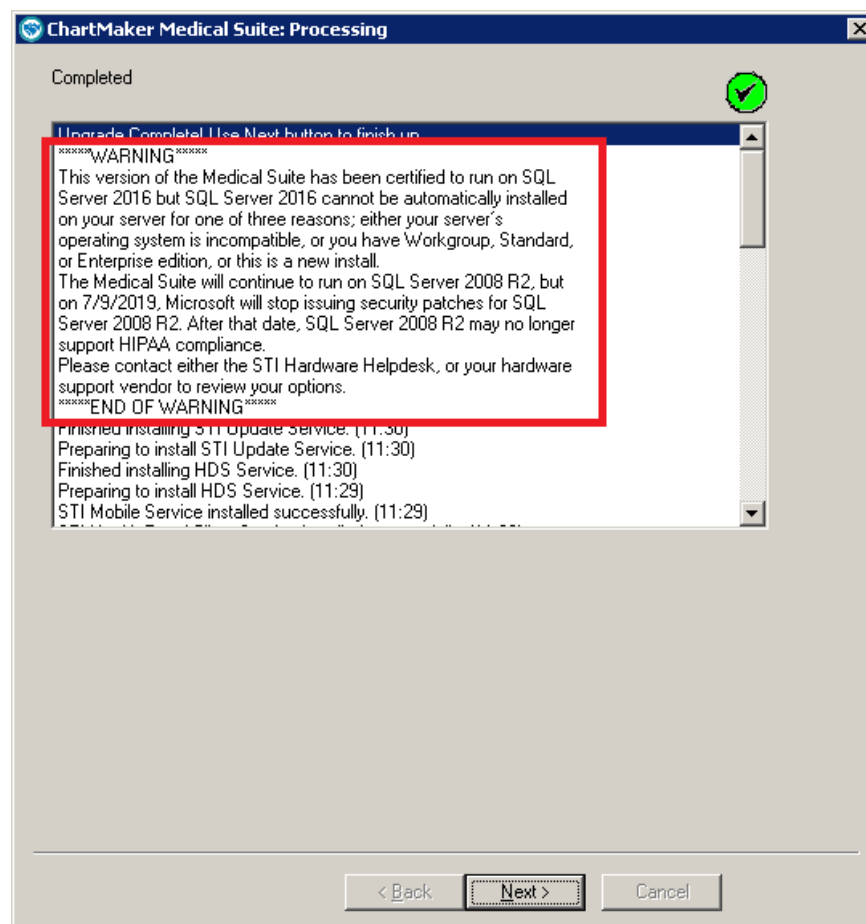


## ChartMaker® Practice Manager Release Notes

ChartMaker® 2018.2 (fv6.5.8)

### Important Notifications

- **Upgrade from Microsoft Server 2008 and Windows 7** – Since January 2020, your Windows 7 workstations and Microsoft 2008 Servers are no longer supported. 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

## Administration

- **Administration – Registries – Immunizations – Barcode Scanner Configuration** – The system has been updated with a new Barcode Scanner Configuration dialog that contains a QR Code that you are able to scan to configure your barcode scanner for the ChartMaker Medical Suite immunization entry. See Figure 1. Simply scan this QR Code to calibrate and configure any barcode scanner with the correct settings to use with the Medical Suite.



Figure 1 – Barcode Scanner Configuration

- **Administration – Transaction Tables – Procedures – Immunization – Barcode Scanning** – The Immunization Manufacturers & Lot Numbers dialog has been updated with a new Scan Barcode button that allows you to scan **2D Data Matrix** and **Linear** barcode scanners on immunization vials to populate information for **Lot Number** (2D Data Matrix only), **Lot Expiration** (2D Data Matrix only), **CVX Code**, and **Product CVX Code**. The button will become enabled when the **New** or **Edit** button is clicked. See Figure 2.

A screenshot of a software window titled "Immunization Manufacturers & Lot Numbers". The window contains several input fields and a table. At the top right, there is a link: "Visit CDC's CPT Mapped to CVX List". Below this, there are fields for "Procedure:" (86710), "CPT4 Code:" (86710), and "CVX Code:" (16). To the right of these fields is a red button labeled "VIS". Below these fields is a table titled "Manufacturers and Lot Numbers for this Procedure:". The table has columns: "Lot Expiration", "Manufacturer", "Lot Number", "Trade Name", "Funding", and "CVX". There is one row of data: "Lot Expiration" is blank, "Manufacturer" is "Abbott Laboratories", "Lot Number" is "123123", "Trade Name" is blank, "Funding" is "Federal funds", and "CVX" is "16". To the right of the table are buttons: "New", "Edit", "Delete", and "Close". Below the table, there is a link: "Visit CDC's Manufacturer's Product Mapped to CVX List". Below this link are fields for "Manufacturer:" (Abbott Laboratories), "Trade Name:" (blank), "Product CVX Code:" (16), "Lot Number:" (123123), "Lot Expiration:" (09/30/2022), and "Funding:" (Federal funds). At the bottom are buttons: "Add to List" and "Cancel". On the right side of the window, there is a red-bordered box containing a QR code and the text "Click here and scan barcode".

Figure 2 – Procedure – Immunization Manufacturers & Lot Numbers

## Administration (continued)

### Administration – Transaction Tables – Procedures – Immunization – Barcode Scanning (continued)

When scanning a **2D Data Matrix** barcode, the **Lot Number**, **Lot Expiration**, **CVX Code**, and **Product CVX Code** will populate in the corresponding fields. If the CVX Code field contains a different value than the scanned value a pop-up warning will appear asking if you want to overwrite that value. See Figure 3. Any previously entered Lot Number, Lot Expiration, or Product CVX Code values will be overwritten by the scanned values, if different.

When scanning a **Linear** barcode, the **CVX Code** and **Product CVX Code** will populate in the corresponding fields. If the CVX Code field contains a different value than the scanned value a pop-up warning will appear asking if you want to overwrite that value. See Figure 3. Any previously entered Product CVX Code value will be overwritten by the scanned value, if different.

After the barcodes have been scanned and the applicable values have populated the corresponding fields, the **Manufacturer**, **Lot Number** (if Linear barcode was scanned), **Lot Expiration** (if Linear barcode was scanned), **Trade Name** (optional), and **Funding** (optional) fields will need to be manually entered. The Manufacturer and Lot Number fields are required and must be entered before you can save the entry.

When information is entered in the Manufacturers & Lot Numbers dialog for a procedure, that information will be used to populate information when adding this immunization in Clinical and Practice Manager, as applicable.

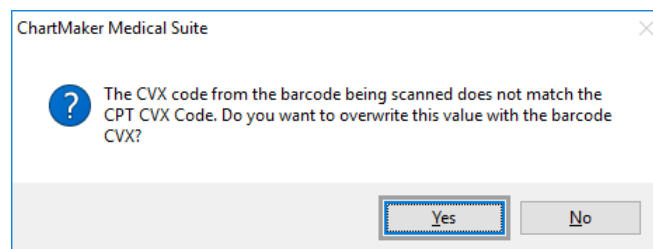


Figure 3 – Immunization Manufacturers & Lot Numbers – CVX Code Message

## Charge

- **Charge – Pending Charge** – In previous versions an issue could arise when sorting the pending charges by Account#/Service Date, where pending charges are not being displayed for patients with alpha-numeric account numbers. This issue has been resolved.

## Clinical

- **Clinical – Immunization – Barcode Scanning** – The Immunization Entry dialog has been updated with a new Scan Barcode button that allows you to scan **2D Data Matrix** and **Linear** barcode scanners on immunization vials to populate **NDC Code** (2D Data Matrix and Linear), **CVX Code** (2D Data Matrix and Linear), **Lot Number** (2D Data Matrix only), and **Lot Expiration** (2D Data Matrix only) information when adding or editing an immunization. See Figure 4. Additionally, when scanning 2D Data Matrix barcodes, if the immunization information was configured for the procedure in the Immunization Manufacturers & Lot Numbers dialog, then any **Manufacturer** and **Funding** information associated with the Lot Number/Expiration will also populate in the corresponding fields.

Also, access to supplemental barcodes for **Dose**, **Route**, and **Site** will be available, allowing you to scan these barcodes to populate applicable information in the corresponding fields. For Dose seven different barcodes are provided (codes for **0.1**, **0.2**, **0.25**, **0.5**, **0.7**, **1.0**, and **2.0**); for Route six different barcodes are provided (**ID – Intradermal**, **IH – Inhalation**, **IM – Intramuscular**, **NS – Nasal**, **PO – Oral**, and **SC – Subcutaneously**); and for Site twelve different barcodes are provided (**LA – Left arm**, **RA – Right arm**, **LD – Left deltoid**, **RD – Right deltoid**, **LLFA – Left lower forearm**, **RLFA – Right lower forearm**, **LT – Left thigh**, **RT – Right thigh**, **LG – Left gluteus medius**, **RG – Right gluteus medius**, **LVL – Left vastus lateralis**, and **RVL – Right vastus latera**).

Once the various scanned data is populated, you can then manually enter or modify any other information, as needed. Data that is scanned or entered manually will be saved and will overwrite any pre-populated data.

Lot Expiration	Trade Name	Manufacturer	Lot Number	Funding
		Abbott Laboratories	123123	Federal funds

Group	VIS Document	Presented
<input checked="" type="checkbox"/> FLU		11/18/2021

Click a Manufacturer row above to fill the immunization entry fields below.

Immunization

Provider Name: Doe, John D. NDC Code: 12345678909 Dose: 1 mL

Manufacturer: Abbott Laboratories CVX Code: 16 Route: IV

Lot Number: 123123 Lot Expiration: 11/18/2021 Site: RA

VFC Eligibility: Funding: Federal funds Administered By: JohnDoe

☐ Disease Immunity ☐ Historical Source: New immunization record Facility:

Immunization Consent

First Name: John Relationship: Consent Date: 11/18/2021 ☐ Consent for Immunization

Last Name: Doe

Save Cancel

Figure 4 – Procedure – Immunization Manufacturers & Lot Numbers

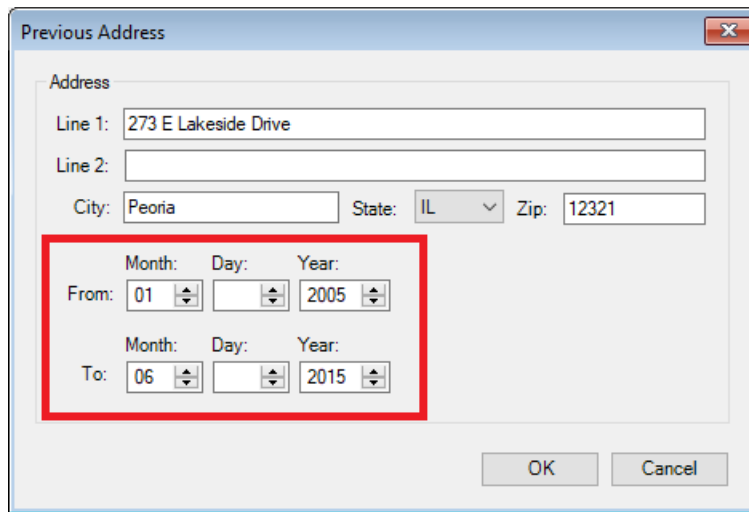
## Inquire

- **Payments – ERA\*** – In previous versions, an issue could arise when manually posting a payment and ICN number included in an imported remittance file, where the Response Viewer was not displaying the complete ERA information for that manually entered payment. This issue has been corrected.

\* This feature was released in the CMMS 6.5.8.412 hot fix release.

## Patient

- **Patient – Other – More Patient** – The Previous Address dialog (accessed via the **Previous Address** button in the More Patient Information dialog), has been updated with **From** and **To** fields allowing you to configure a date range for the previous address. See Figure 5. When entering From / To dates, you can enter just the Year, or Month and Year, or Month, Day, and Year; however, you cannot enter future dates, and the From date cannot have a later date than the To date. Likewise, if you enter a From date, you must enter a To date, and vice versa.



Previous Address

Address

Line 1: 273 E Lakeside Drive

Line 2:

City: Peoria State: IL Zip: 12321

From: Month: 01 Day: Year: 2005

To: Month: 06 Day: Year: 2015

OK Cancel

Figure 5 – More Patient Information – Previous Address

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