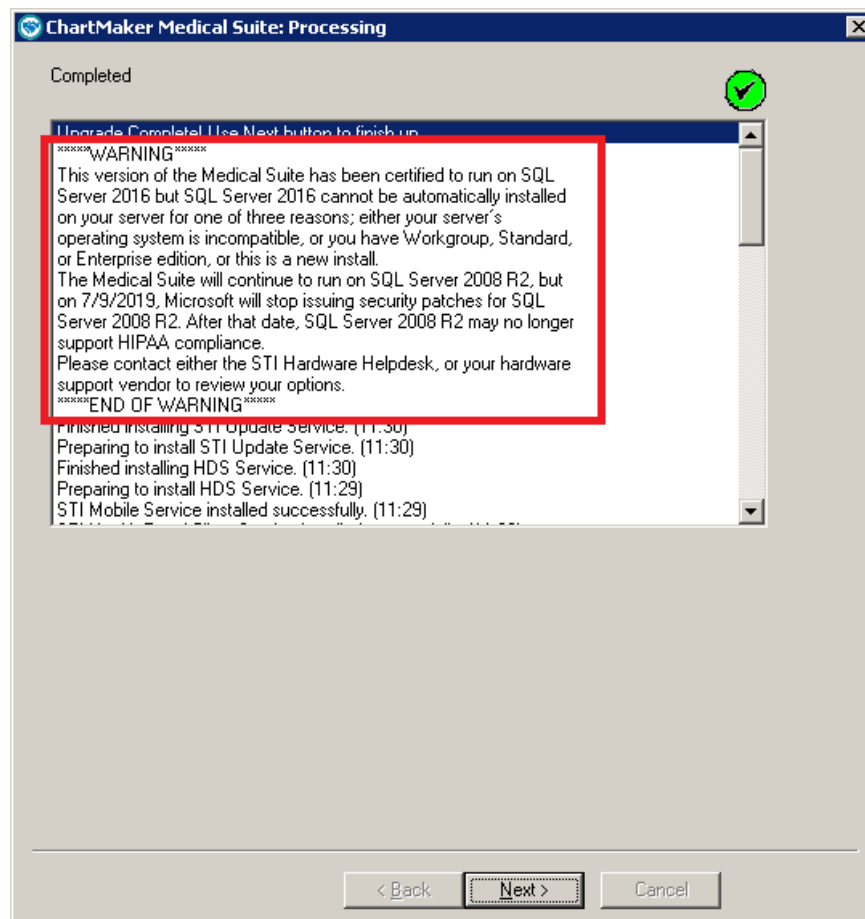


ChartMaker® Practice Manager Release Notes

ChartMaker® 2022.1 (fv6.7.4)

Important Notifications

- **Upgrade from Microsoft Server 2008/2012 and Windows 7/8** – Since January 2020, your **Windows 7/8** workstations and **Microsoft 2008 Servers** are no longer supported. Likewise, support for **Windows 8.1** will end on January 10, 2023, and support for **Windows Server 2012/2012R2** will end on October 10, 2023. 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 – Preferences – System Level Preferences – Payment – The **Pending Payments** section of the **Payment** tab, in the Maintain System Default Preferences dialog, has been updated with an **Only show charges billed to the patient** option, that will be checked and active by default. See Figure 1. When this preference is checked, the Pending Payments tab, in the Payment screen, will only display open charges that have are due from the patient and have been billed to the patient. When this preference is unchecked, and inactive, the Pending Payments tab will display all open charges, whether they due from the insurance or patient.

The screenshot shows the 'Maintain System Default Preferences' dialog box with the 'Payment' tab selected. The 'Pending Payments' section contains the following options:

- ☒ Enable Popup Notes
- ☐ Show Charge Insurance First
- ☒ Display Case Type instead of Case Number
- ☒ Hide Payment Calculation By Default
- ☐ Automatically Calculate Check # For Insurance Payments
- ☐ Default Balance Due as Amount Paid for Secondary Insurance in Payments
- Retrieve payments for the previous months
- Insurance Only Writeoff Code:
- ☒ Charges selected by default
- ☒ Filter based on user's practice permissions
- Default Payment Type for Patient Pay Online:
- ☒ Only show charges billed to patient
- ☒ Warn before creating profiles
- ☐ Do not auto update profiles from the payment screen.

At the bottom of the dialog are buttons for 'Save', 'Refresh', 'Restore Defaults', and 'Cancel'.

Figure 1 – Maintain System Default Preferences – Patient

Administration (continued)

- **Administration – Preferences – Practice Level Preferences – Payment** – The **Pending Payments** section of the **Payment** tab, in the Maintain Practice Preferences dialog, has been updated with an **Only show charges billed to the patient** option, that will be checked and active by default. See Figure 2. When this preference is checked, the Pending Payments tab, in the Payment screen, will only display open charges that have are due from the patient and have been billed to the patient. When this preference is unchecked, and inactive, the Pending Payments tab will display all open charges, whether they due from the insurance or patient.

Maintain Practice Preferences - 1

Inquiry | Patient Billing Control | Patient Statement Format | Appointment
General Behavior | Balance View | Patient | Charge | Payment | Payment Calculate

Payment Preferences

- ☒ Enable Popup Notes
- ☐ Show Charge Insurance First
- ☒ Display Case Type instead of Case Number
- ☒ Hide Payment Calculation By Default
- ☐ Automatically Calculate Check # For Insurance Payments
- ☐ Default Balance Due as Amount Paid for Secondary Insurance in Payments

Retrieve payments for the previous months

Insurance Only Writeoff Code:

Pending Payments

- ☒ Charges selected by default
- ☒ Filter based on user's practice permissions
- ☒ Only show charges billed to patient

Default Payment Type for Patient Pay Online:

Profiles

- ☒ Warn before creating profiles
- ☐ Do not auto update profiles from the payment screen.

Save Refresh Restore Defaults Cancel

Figure 2 – Maintain Practice Preferences – Patient

Appointment

- **Appointment – Documents – Charge Slip** – In previous versions, an issue could arise when printing PDF charge slips resulting in slow performance and memory exception errors. This issue has been corrected and performance has been improved.
- **Appointment – Documents – Charge Slip** – In previous versions, an issue could arise when filtering appointments by an insurance and/or a resource could (**Ins 1** and/or **Resource** in the Appointment List Options) where the charge slips would not print correctly. This issue has been corrected.

Clinical

- **Clinical – Immunization** – The program has been updated to ensure that the latest CVX codes and CVX mappings, MVX codes and MVX mappings, Manufacturers, and NDC codes, per the latest CDC guidelines, are used for immunization procedures.

Documents

- **Documents – Appointments – Charge Slip**– In previous versions, an issue could arise when printing PDF charge slips resulting in slow performance and memory exception errors. This issue has been corrected and performance has been improved.
- **Documents – Appointments – Charge Slip**– In previous versions, an issue could arise when filtering appointments by an insurance and/or a resource could (**Ins 1** and/or **Resource** in the Appointment List Options) where the charge slips would not print correctly. This issue has been corrected.

Patient

- **Patient – Other – More Patient** – The More Patient Information dialog, accessed via the More Patient button in the Patient screen, has been updated with a **Pronouns** field, allowing you to configure the patient's pronouns. The Pronouns drop-down list will contain the standard pronouns based on LOINC code set (he/him/his/his/himself, she/her/her/hers/herself, they/them/their/theirs/themselves, ze/zir/zir/zirs/zirself, xie/hir ("here")/hir/hirs/hirself, co/co/cos/cos/coself, en/en/ens/ens/enself, ey/em/eir/eirs/emself, yo/yo/yos/yos/yoself, and ve/vis/ver/ver/verself). See Figure 3.

More Patient Information

1.. Additional Information

Date of Death: / / Military Branch: Weight: Retirement Date: / / Military Grade: Nickname: Signature Date: / / Military Status:

Mother's Name
First: Last: Maiden:

Previous Info Advance Directives Patient County

2. Billing Information

Defer Patient Bill Defer Insurance Claims Budget Amount: 0.00
Start Date: / / Start Date: / / Charges From: / /
End Date: / / End Date: / / Charges Thru: / /
Last Bill: Cycle Date: / / Activation: / /

3. Patient Representative

Type	Name	Address	Home	Relationship
<div>< ></div>				

Add Edit Delete

Save Cancel

4.. Sexual Orientation

Do you think of yourself as: (Check one.)

☐ Lesbian, gay or homosexual
☐ Straight or heterosexual
☐ Bisexual
☒ Something else, please describe
☐ Don't know
☐ Choose not to disclose

5.. Gender Identity

What is your current gender identity? (Check all that apply.)

☐ Identifies as Male
☒ Identifies as Female
☐ Female-to-Male (FTM)/Transgender Male/Trans Man
☐ Male-to-Female (MTF)/Transgender Female/Trans Woman
☐ Genderqueer, neither exclusively male nor female
☒ Additional gender category or other, please specify
☐ Choose not to disclose

6.. Pronouns

she/her/her/hers/herself
he/him/his/his/himself
she/her/her/hers/herself
they/them/their/theirs/themselves
co/co/cos/cos/coself
en/en/ens/ens/enself
ey/em/eir/eirs/emself
yo/yo/yos/yos/yoself
ve/vis/ver/ver/verself

Figure 3 – Patient – More Patient Information

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