

ChartMaker® Practice Manager Release Notes

ChartMaker[®] 2018.2 (fv6.3.5)

Important Notifications

- Upgrade from Microsoft Server 2008 and Windows 7 In January 2020, your Windows 7 workstations and Microsoft 2008 Servers will no longer be supported. Even with security patches, <u>problems may still arise</u> if you choose not to upgrade. In addition, your workstations will no longer be HIPAA compliant. To avoid potential issues in the future, contact our <u>Technical Services Department</u> 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 HIPPA compliant, it is important to contact either STI Hardware Helpdesk, or your software vendor, to review your options.

👯 ChartMaker Medical Suite: Processing	×
Increased Proceeded I have brack to finish ref Insignment Insignment Server 2016 but SQL Server 2016 cannot be automatically installed on your server for one of three reasons; either your server's operating system is incompatible, or you have Workgroup, Standard, or Enterprise edition, or this is a new install. The Medical Suite will continue to run on SQL Server 2008 R2, but on 7/9/2019, Microsoft will stop issuing security patches for SQL Server 2008 R2. After that date, SQL Server 2008 R2 may no longer support HIPAA compliance. Please contact either the STI Hardware Helpdesk, or your hardware support vendor to review your options. END OF WARNING***** Finished install STI Update Service. (16:09) Finished install MDS Service. (16:09) STI Mobile Service installed successfully. (16:09) STI Mobile Service installed successfully. (16:09)	
< <u>B</u> ack (Next>) Cancel	

ChartMaker Medical Suite SQL Server 2016 Warning

General

System Login – The Login screen for Practice Manager has been redesigned to include our new corporate logo, as well as a Did you know? section, on the right side of the screen, to better inform you of various new features within the ChartMaker Medical Suite, as well as additional services that STI offers. See Figure 1. Logging into Practice Manager is similar as before, by entering the User ID and Password, and then clicking the Sign In button. Likewise, if your system has multiple databases, a Database field will be appear allowing you to select the applicable database.

Welcome to ChartMaker® Medical Suite	
ChartMaker® Medical Suite Sign in to Practice Manager	Did you know ⑦
User ID Password Sign In Cancel	You have the ability to automatically contact your patients to remind them of their appointments or recalls. Please visit our website to enroll.
Product Version: ChartMaker® 2018.2 STI Computer Services, Inc. Service. Technology. Innovation. sticomputer.com	Ĭ

Figure 1 – Welcome to ChartMaker[®] Medical Suite

After you have successfully logged on, a new splash screen will appear listing the various services and solutions STI provides. See Figure 2.



Figure 2 – Solutions – Splash Screen

General (continued)

To-Do List – The To-Do List dialog (accessed by clicking To-Do > View To-Do List) has been updated with
the ability to filter to-do list items by Subject. By clicking the Subject heading you can sort in ascending order, or,
by clicking the Subject heading again, in descending order. Likewise, you can select a Subject heading to view by
clicking the corresponding drop-down list. See Figure 3. Do note, however, when selecting a specific subject via
the drop-down list, the drop-down list will only contain those subjects contained on the page of the To-Do List
you are currently viewing.

Owner:	ID	John Doe	•							
Date	From	Priority	🚽 Subject	- 1 🖵	Туре 💌	Patient	Star	t Target	Complete	BBB
07/: <mark>(All)</mark> GENER	RAL Progres	s Note			Unsigned Note	Doe, Jennifer				
09/ HEMOI	GLOBIN & F	IEMATOCRIT No	Provider Found. No acct n	umber.	Unsigned Note	Doe, Jane				
09/20/20/20	NGFUL US	E STANDARD GE	NERAL E&M	1016	Unsigned Note	Doe, Jennifer				
11/17/2016	6	Normal	GENERAL Progress N	lote	Unsigned Note	Doe, Carl				
03/10/2017	,	Normal	GENERAL Progress N	lote	Unsigned Note	Doe, Rene				
04/06/2017	,	Normal	GENERAL Progress N	lote	Unsigned Note	Doe, Jane				
04/10/2017	,	Normal	GENERAL Progress N	lote	Unsigned Note	Doe, Rene				
06/01/2017	,	Normal	GENERAL Progress N	lote	Unsigned Note	Doe, John				1
08/24/2017	,	Normal	GENERAL Progress N	lote	Unsigned Note	Doe, John				
11/29/2017	,	Normal	GENERAL Progress N	lote	Unsigned Note	Doe, John				
01/23/2015	5	High	HEMOGLOBIN & HEM	ATOCR	Lab Result	TEST, BMC FAITH	ł			
01/23/2015	5	High	HEMOGLOBIN & HEM	ATOCR	Lab Result	TEST, BMC FAITH	ł			
01/27/2015	5	High	HEMOGLOBIN & HEM	ATOCR	Lab Result	TEST, BMC FAITH	ł			
01/27/2015	5	High	HEMOGLOBIN & HEN	ATOCR	Lab Result	TEST, BMC FAITH	ł			
01/27/2015	i	High	HEMOGLOBIN & HEN	ATOCR	Lab Result	TEST, BMC FAITH	ł			L
05/14/2014	Ļ	Normal	MEANINGFUL USE S	TANDA	Unsigned Note	Doe, Jennifer				
08/05/2014	Ļ	Normal	MEANINGFUL USE S	TANDA	Unsigned Note	Smith, John				
09/04/2014	ļ.	Normal	MEANINGFUL USE S	TANDA	Unsigned Note	Smith, -				
10/31/2014	Ļ	Normal	MEANINGFUL USE S	TANDA	Unsigned Note	Doe, Jennifer				
01/22/2018	<u> </u>	N and al			l la siene el blata	Dee leuniter				
14 🖣 🛛	.26-150	of 784 items			RRR = Read	l Receipt Requeste	d		Show Compl	eted Items

Figure 3 – To-Do List

Charge

Charge – Pending Charges – The Pending Charges tab has been updated with more enhanced filtering options
that allow you to sort charges by Account#/Service Date, Procedure, or Service Date, as well as ordering
those charges with in the selected sort option in Ascending or Descending order. See Figure 4. When the
Account#/Service Date option is selected, the charges will be sorted by account number first, and then by service
date.

												-		_	-	
Practice	Account #	Case Type	Case ID #	Service Date		Mod1	Mod2 ICD10	1 ICD10 2	ICD9 1	ICD9 2	Amount	Payment	Insurance	•	Comment/Note	
	10009	NBM	10016	02/12/2014	89240						0	0	AET			
1	10009	NBM	10016	08/14/2015	87088						0	0	AET			
1	10009	NBM	10016	08/14/2015	81015						0	0	AET			
1	10009	NBM	10016	08/14/2015	81050		N92.6				0	0	AET			
1	10009	NBM	10016	08/14/2015	82436		N92.6				0	0	AET			
1	10009	NBM	10016	08/14/2015	81099		N92.6				0	0	AET			
1	10009	NBM	10016	08/14/2015	82615		N92.6				0	0	AET			
1	10009	NBM	10016	09/09/2015	99245		110				0	0	AET			
1	10009	NBM	10016	09/09/2015	81005						0	0	AET			
1	10012	NBM	10012	01/07/2019	99242		F03.91				0	0	MCD			
1	10040	NBM	10023	11/27/2018	99245		110				0	Ō	MCD			

Figure 4 – Charge – Pending Charge

Clinical

 Clinical – Immunization – Immunization Registry – NYSIIS – The system has been updated so that the New York State Immunization Information System (NYSIIS), in conjunction with the ChartMaker[®] Medical Suite, utilizes 2.5.1 v1.5 HL7 bidirectional messaging and exchange of vaccine (immunization) information. Once the system is set up, and you are enrolled with NYSIIS, immunization records will be automatically sent to the NYSIIS when the immunization record is saved (via the Next Account button) in the Immunization sub-tab of Clinical tab in Practice Manager, or when a chart note is saved or closed in the Clinical application.

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