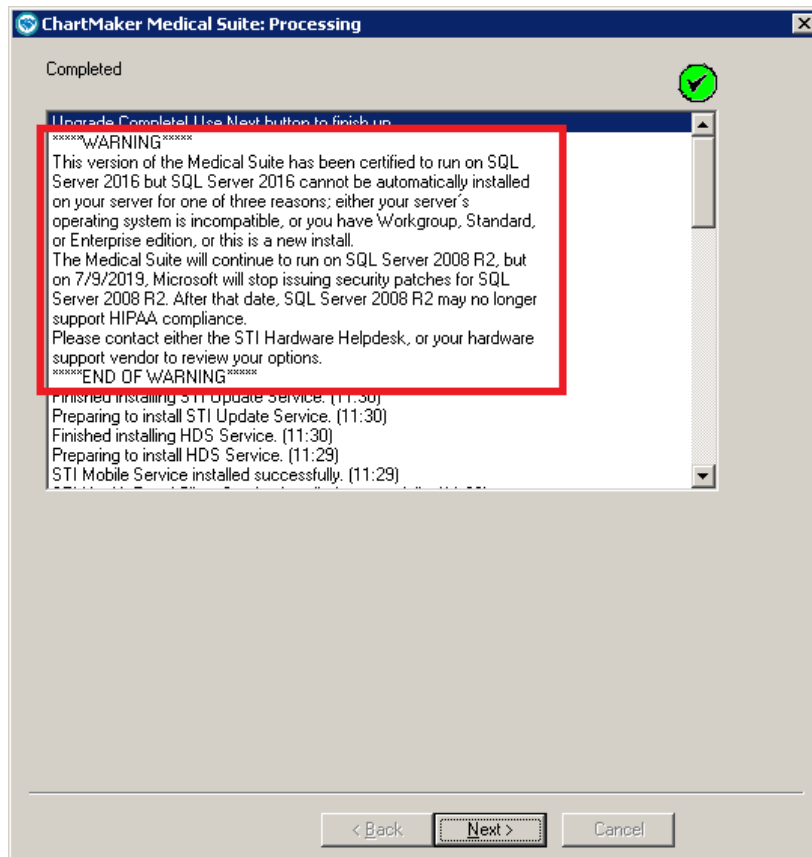


## ChartMaker® Clinical Release Notes

### ChartMaker® 2022.1 (fv6.7.3)

#### 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

## Added Features

- **The Note Tab – Order Procedure – Immunizations** – 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.
- **The Note Tab – Order Procedure** – The program has been updated so that whenever a procedure order (lab, test, or image) is entered, all diagnoses selected for that order (up to 5) will print and/or be displayed on the order form.
- **System Tables – Order Sets** – The **Order Set Template** dialog, accessed when creating a new order set or editing an order set in the **Order Set List** dialog, has been updated with an **Immunizations** section that allows you to configure immunization procedures for an order set. See Figure 1. Immunization procedures can be added to the order set by clicking the corresponding **Add** button, and then searching for and selecting the applicable immunization procedure in the Immunization Search dialog. This works in a similar manner as adding Labs, Tests, and Imaging procedures to an order set. Once added, an immunization can be removed from the order set, if needed, by highlighting the immunization procedure, and clicking the **Remove** button.

When an order set contains an immunization procedure, and a linked diagnosis code for the order set is selected in a chart note, the immunizations associated with the order set will be added to the first procedure checklist in the note that is tagged as an immunization type. If there is not a procedure checklist tagged as an immunization type in the note, the immunizations will be added to the first procedure checklist regardless of type. Also, the linked diagnosis code that triggered the order set will be automatically associated with the applicable immunization procedures.

Order Set Template

Order Set Name: Hypertension ☒ Global Order Set

**Labs**

Description	In House	Prompts Warnings	Send To
Lab Procedure	<input checked="" type="checkbox"/>		John D Doe

**Tests**

Description	In House	Prompts Warnings	Send To
Test Procedure	<input checked="" type="checkbox"/>		John D Doe

**Imaging**

Description	In House	Prompts Warnings	Send To
Image Procedure	<input checked="" type="checkbox"/>		John D Doe

**Immunizations**

Description	Prompts Warnings
-------------	------------------

**Medications**

Description
Azor

**Referrals**

Name	Address
Anne Doe	4312 W Genesee Street

Link Diagnosis Save Cancel

Figure 1 – Order Set Template

## Added Features (continued)

- **System Tables – Modifier** – The system has been updated so that whenever a modifier is deleted in the **Modifier** dialog (Administration > Transaction Tables > Modifier) in Practice Manager, it will also be removed in the Modifier dialog (Edit > System Tables > Modifier) and will not be included in the Charge Items dialog and any Procedure Checklists. However, the removed modifier will remain in any legacy note output where the modifier was selected before it was deleted. Likewise, if a modifier is deleted in the Modifier dialog in Clinical, it was also be removed from the Modifier dialog in Practice Manager.
- **Template Editing – Procedure Checklists** – The **Mark Checklist As** drop-down list, in the **Procedure Checklist Properties** dialog, has been a Procedure Checklist, when creating a new order set or editing an order set in the **Order Set List** dialog, has been updated with a new **Immunizations** option that allows you to tag a procedure checklist as Immunizations. See Figure 2.

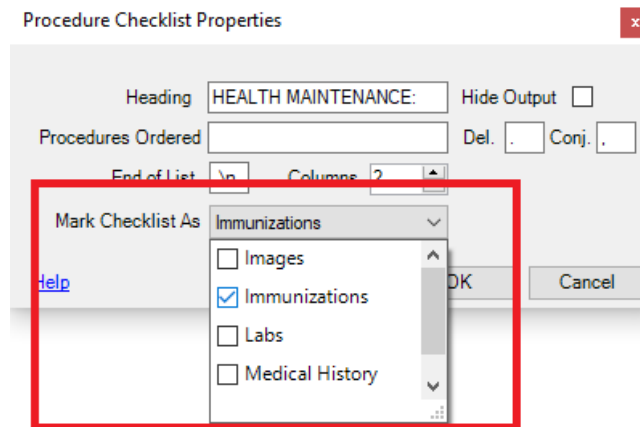


Figure 2 – Procedure Checklist Properties

- **Updox Faxing** – The system has been updated so that unfinalized custom forms (.FORM) can now be electronically faxed. When selecting unfinalized custom forms via the Organizer, a warning pop-up message will no longer appear indicating that these types of documents cannot be faxed. Likewise, when selected, the unfinalized form will appear in the Documents to be Faxed section of the Updox Faxing dialog and can be selected to faxed in the same manner as other supported document types.

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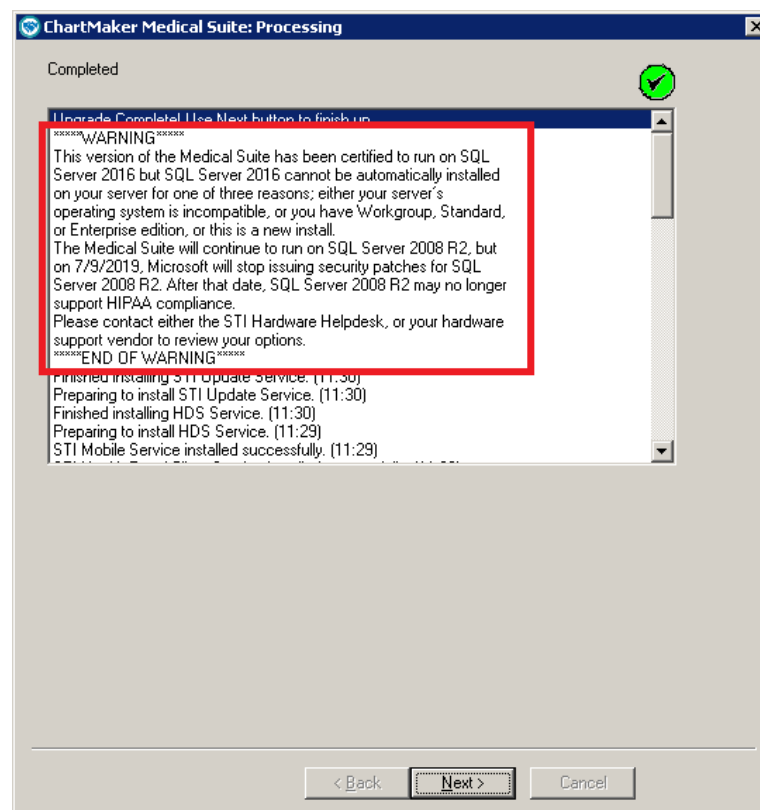
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## ChartMaker® Practice Manager Release Notes

### ChartMaker® 2022.1 (fv6.7.3)

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ChartMaker Medical Suite SQL Server 2016 Warning

## Add-Ins

- **Insurance Billing – Billing Configuration** – The **Diagnosis Print Method** field, in the **Maintain Billing Preferences** dialog (**Add-Ins > Insurance Billing > Billing Configuration**), has been updated so that the labels for third (**Primary/Secondary ICD-10 Codes**) and fourth (**Primary ICD-10 Code Only**) options indicate ICD-10 Codes. See Figure 1. In previous versions, it was mislabeled as ICD-9 Codes.

Maintain Billing Preferences

Preference Parameters

Practice: \* Insurance: \* Billing Form: [v] [Get Preference] [Pick List]

Insurance Billing Process | Insurance Billing Break Fields

Insurance Billing Processing Preferences

Signature Message: [Signature On File]

Assignment Print Method: [0] Calculate Amount Paid Method: [2]

Diagnosis Print Method: [1] Calculate Balance Due Method: [2]

Print Provider Signature: [1] Reference All [2] Reference Primary Only [3] Primary/Secondary ICD-10 Codes [4] Primary ICD-10 Code Only

Billing Output Order: [1] Reference All [2] Reference Primary Only [3] Primary/Secondary ICD-10 Codes [4] Primary ICD-10 Code Only

Facility Print Method: [0] Insurance Name, Address alignment for paper forms: [0]

HCFA Box25 TaxID# [0]

☒ Remove Diagnosis Decimal ☒ Remove Dollar Decimal

[Save] [Refresh] [Restore Defaults] [Cancel] [?]

Figure 1 – Maintain Billing Preferences

## Administration

- **Transaction Tables – Modifier** – The system has been updated so that whenever a modifier is deleted in the **Modifier** dialog (Administration > Transaction Tables > Modifier) in Practice Manager, it will also be removed in the Modifier dialog (**Edit** > **System Tables** > **Modifier**) and will not be included in the Charge Items dialog and any Procedure Checklists. However, the removed modifier will remain in any legacy note output where the modifier was selected before it was deleted. Likewise, if a modifier is deleted in the Modifier dialog in Clinical, it was also be removed from the Modifier dialog in Practice Manager.

## Clinical

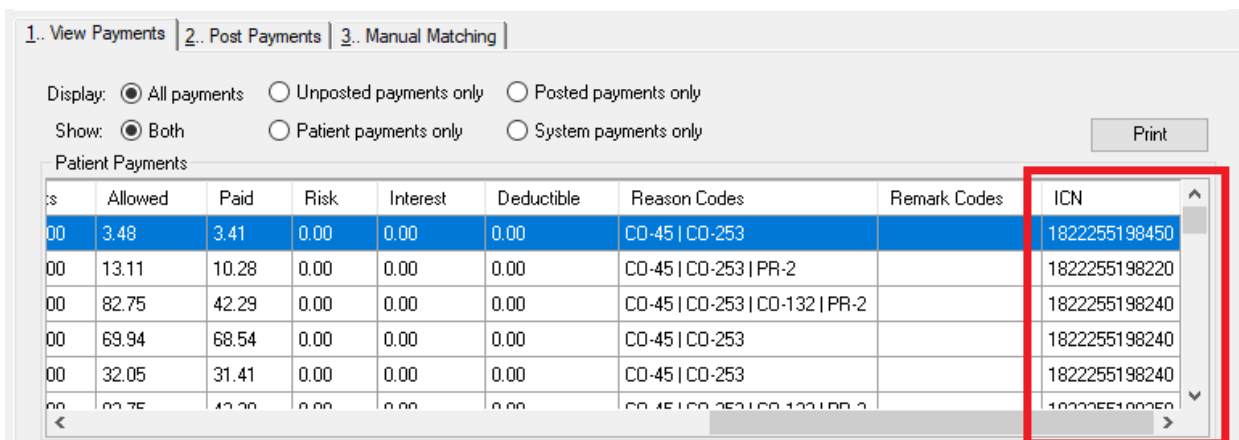
- **Clinical – Immunization** – The program has been updated to ensure that the latest CVX codes and CVX mappings, MVX codes and MVX mappings, Manufacturers, and NDC codes, per the latest CDC guidelines, are used for immunization procedures.

## Patient

- **Patient – Case – Consent** – The system has been updated so that when a patient has multiple cases, and the **Consent** button is clicked to access the Consent dialog, the **Case** field in the Consent dialog will default to whatever case was selected in the Patient screen at the time the Consent button was clicked.

## Remittance

- **Remittance – Post Remittance Payments – View Payments** – The Patient **Payments** and **System Payments** areas, in the View Payments tab, have been updated with an **ICN** column that will display any ICN number associated with the payment. See Figure 2. Likewise, when printing the Payment Remittance Report, by clicking the **Print** button, has also been updated to include an ICN column that will display any ICN number associated with the payments listed in the report.



	Allowed	Paid	Risk	Interest	Deductible	Reason Codes	Remark Codes	ICN
00	3.48	3.41	0.00	0.00	0.00	CO-45   CO-253		1822255198450
00	13.11	10.28	0.00	0.00	0.00	CO-45   CO-253   PR-2		1822255198220
00	82.75	42.29	0.00	0.00	0.00	CO-45   CO-253   CO-132   PR-2		1822255198240
00	69.94	68.54	0.00	0.00	0.00	CO-45   CO-253		1822255198240
00	32.05	31.41	0.00	0.00	0.00	CO-45   CO-253		1822255198240

Figure 2 – Remittance – Post Remittance Payments – View Payments

# Reports

## Managed Care Reports

- **Encounter Analysis → NCQA Requirements** – To meet the new guidelines for PCMH, the NCQA encounter report has been updated to include Race, Ethnicity, Gender Identity, Sexual Orientation, and Employment Status encounter counts and percentages. See Figure 3.

<b>Encounter Report - Fictional Physicians</b>		
Encounter Date: From: to:		
Total Encounters: 4		
Percent of Encounters Where Minimum Requirements Met:		
PCMH Item	Number of Encounters With Item	Percent of Encounters With Item
Address	4	100.00
Advance Directives Documented	0	0.00
Billing Codes for Services	4	100.00
Current and Past Diagnoses	0	0.00
Date of Previous Clinical Visits	4	100.00
DOB	4	100.00
E-Mail Address	0	0.00
Emergency Contact Information	0	0.00
Employment Status	0	0.00
External ID	0	0.00
Gender	4	100.00
Gender Identity	4	100.00
Health Insurance Coverage	4	100.00
Internal ID	4	100.00
Language	0	0.00
Marital Status	0	0.00
Name	4	100.00
Telephone	4	100.00
Voluntarily Self Identified Ethnicity	0	0.00
Voluntarily Self Identified Race	0	0.00
Sexual Orientation	4	100.00

**Figure 3 – Encounter Analysis - More Patient Information – Previous Address**

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