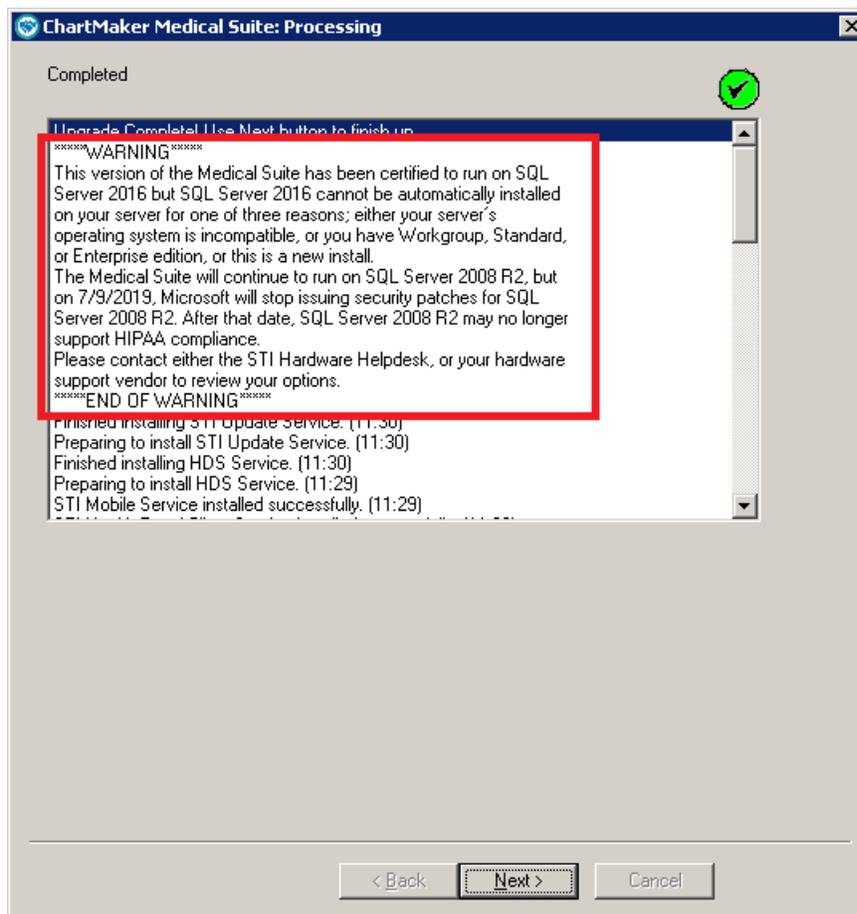


## ChartMaker® Clinical Release Notes

### ChartMaker® 2018.2 (fv6.5.0)

#### 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**

## Added Features

- **Facesheet – Problem/Diagnosis List** – The tooltip that appears when hovering over a diagnosis in the Facesheet has been updated to include an (HCC) indicator after the description for diagnoses that are mapped to an HCC (Hierarchical Condition Categories) code. See Figure 1. This will provide consistency on how these diagnosis codes are displayed and allow you to easily identify these types of codes.

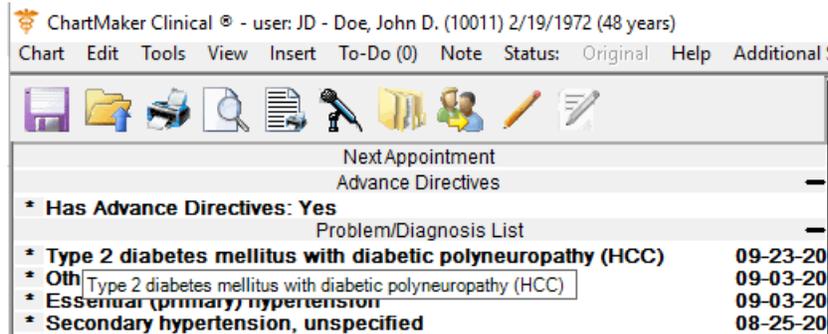


Figure 1 – Facesheet – Problem/Diagnosis List

- **The ID Tab – Patient** – In conjunction with the new Patient Reminder Module features that allow you to import and export recall information to RevSpring in Practice Manager (in version ChartMaker 2018.2 fv 6.4.8), the **Reminder Preference** field found in the Patient section of the ID Tab has been removed to avoid confusion on how the reminder preferences are configured for appoints and recalls.
- **The ID Tab – Patient** – The Patient section of the ID tab has been updated with a **No Email Available** option, next to the Email Address field, that allows you to indicate if a patient does not have an email option available to them. See Figure 2. When the No Email Available option is checked, the Email Address field will be grayed out and disabled. Likewise, if this option is checked in Clinical, when accessing the patient in the Patient screen in Practice Manager the corresponding No Email Available option will be checked and the Email field will be grayed out and disabled, and vice versa.

Patient

Chart # Salutation First Name Middle Name Last Name Suffix

10011 [dropdown] John D Doe

Mailing Address [checkbox] Exempt from Reporting [checkbox] Signed Privacy Disclosure Consent

63 Main Street

[checkbox] Restricted Chart Authorized Users...

Social Security Status

213-21-3213 Active [dropdown]

Birth Sex [dropdown] Male

Birth Date Time

02/19/1972 12:00 AM

Age: 48 years

[checkbox] Multiple Birth Birth Order [input]

Confidentiality Isolation Marital Status

[dropdown] [dropdown] [dropdown]

Race Language Ethnicity

[dropdown] [dropdown] [dropdown]

Primary Home

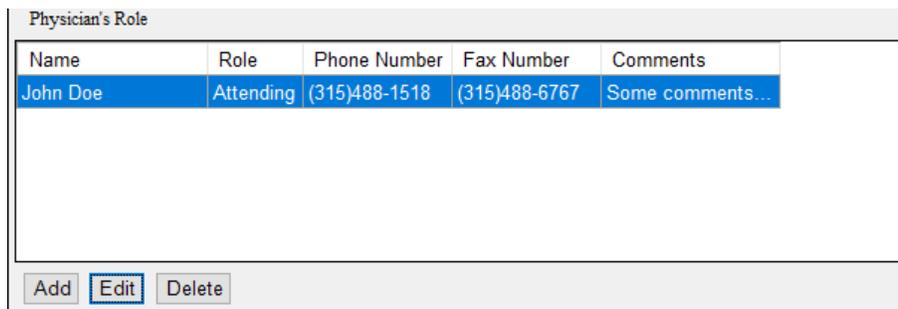
(315) 488-1518 ( ) - ( ) - Edit Numbers...

Email Address [checkbox] No Email Available

Figure 2 – The ID Tab – Patient

## Added Features (continued)

- **The ID Tab – Physician Role** – The Physician Role section of the ID tab has been updated to display the phone and fax numbers of the selected physicians, and will automatically be updated when these numbers are changed in the Provider or Referring Provider areas of the system. See Figure 3.



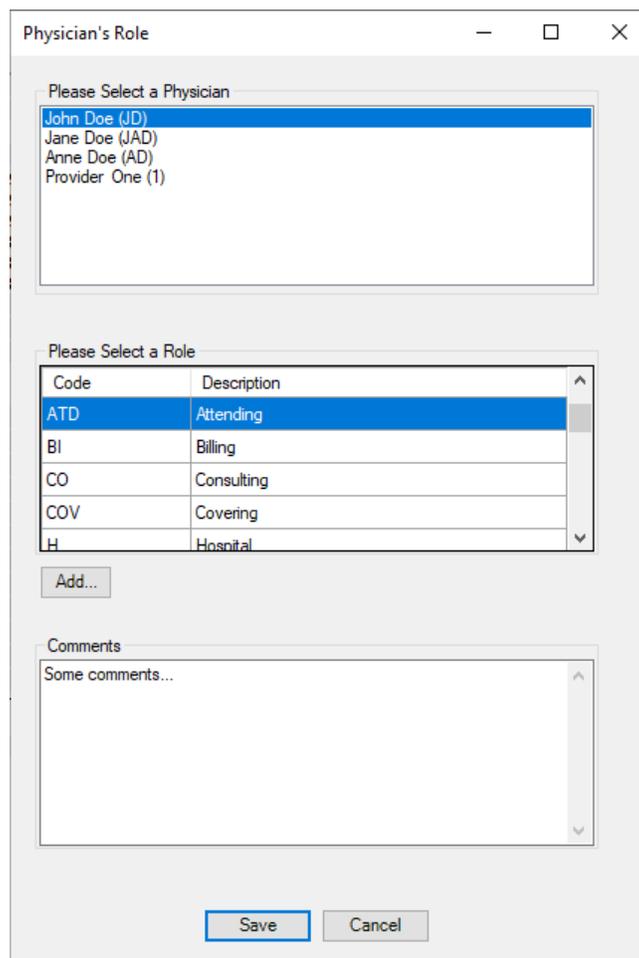
Name	Role	Phone Number	Fax Number	Comments
John Doe	Attending	(315)488-1518	(315)488-6767	Some comments...

Add Edit Delete

Figure 3 – ID Tab – Physician's Role

Likewise, when adding or editing physicians, the **Please Select a Physician** section of the **Physician Role** dialog has been updated so that all providers/referring providers will now have their applicable IH Code allowing you to easily recognize and select the correct physician. See Figure 4.

Do note that some legacy physicians will not be automatically updated if a provider and referring provider have the same IH Code, and the exact First and Last name; or, if the First and Last name does not match either record for the provider or referring physician. To correct this issue, these types of legacy providers will need to be deleted and the correct physician added.



Physician's Role

Please Select a Physician

- John Doe (JD)
- Jane Doe (JAD)
- Anne Doe (AD)
- Provider One (1)

Please Select a Role

Code	Description
ATD	Attending
BI	Billing
CO	Consulting
COV	Covering
H	Hospital

Add...

Comments

Some comments...

Save Cancel

Figure 4 – Physician's Role

## ***Added Features (continued)***

- **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.
- **Updox Faxing** – The system has been updated to allow you to use the Updox Faxing functionality without having to meet operating system requirement of Windows 10 (or above) for PCs and laptops, and Windows Server 2016 (or above) for servers. Specifically, this allows users of Windows Server 2012R2 to utilize the Updox Faxing functionality. Do note, that this requires additional configuration for computers not using Window 10 (or above) or Windows Server 2016 (or above). Contact Software Support for further information on this new functionality, as well as to configure your applicable PCs, laptops, and servers.

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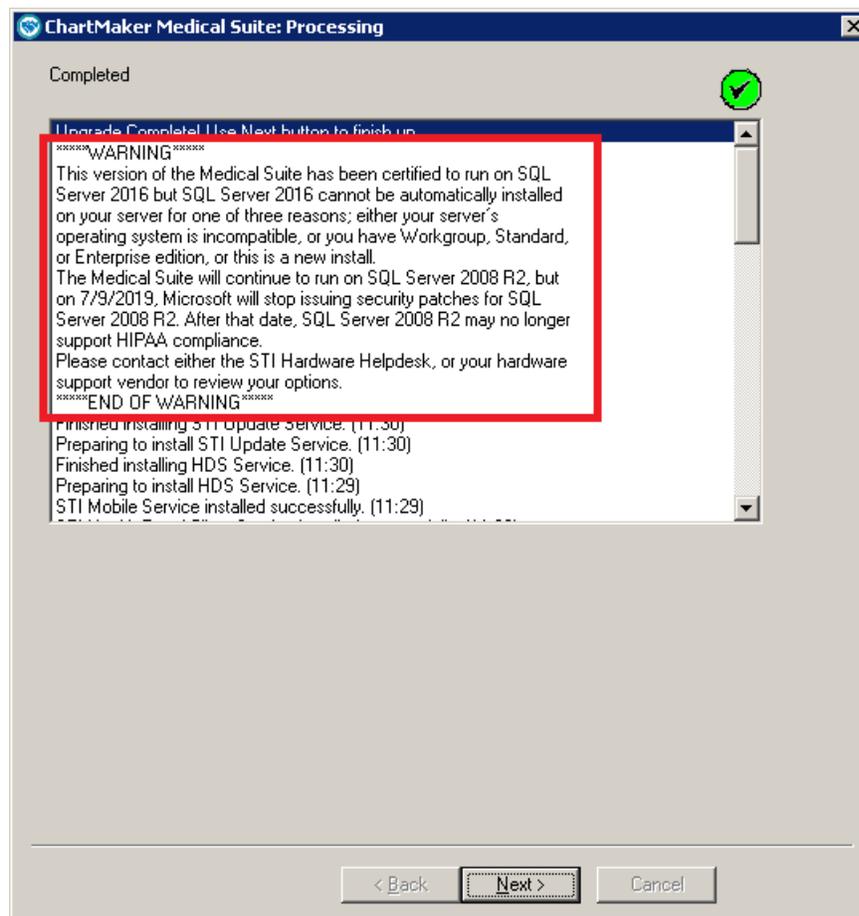
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## ChartMaker® Practice Manager Release Notes

### ChartMaker® 2018.2 (fv6.5.0)

#### Important Notifications

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- **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**

## 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 – Additional Information** – The Additional Information section of the Patient screen has been updated with a **No Email Available** option, next to the Email field, that allows to indicate if a patient does not have an email option available to them. See Figure 1. When the No Email Available option is checked, the Email field will be grayed out and disabled. Likewise, if this option is checked in Patient screen in Practice Manager, when accessing the patient in the ID tab in Clinical the corresponding No Email Available option will be checked and the Email Address field will be grayed out and disabled, and vice versa.

2.. Additional Information

Birth Sex: M DOB: 02/19/1972 SSN: 213-21-3213

Mar Status: Emp Status: Employer:

Pat Status: 1 Fin Status:  Multiple Birth

Race: Birth Order:

Language: Ethnicity:

Alternate Account #:  Signed Privacy Disclosure

Email:  No Email Available

Figure 1 – Patient – Additional Information

## Payment

- **Payment – Review Payments** – The **Filter Options** section, of the **Review Payments** subtab in the Payment screen, has been updated with **Charge End Date** filter option that allows you to enter a **From** and **To** date to filter payments for a chart end date range. See Figure 2. Likewise, to better clarify the date options for filtering the payment information, the Date Paid fields has been updated to **Payment Date**, and the Date Entered field has been updated to **Payment Date Entered**.

Payment

Account #: 10011 John D Doe Pat. Status: 1 Fin. Status: Practice: Fictional Physicians Balance View Family Links

1.. Make a Payment 2.. Review Payments 3.. Enter Credits

Filter Options

Check #: Case: <All>

Payment Date: From: 07/13/2012 To: 10/13/2020

Payment Date Entered: From: // To: //

Charge End Date: From: // To: //

Any Payment Type  
 Insurance  Patient  Credit

Notes End Now

Sel	Charge End Date	Procedure	Charge	Date Paid	Allowed	Deductible	Paid	Type	WriteOff	Code	Who Paid	Balance	Adj. Group	Adj. Reason	Adj. Amou	N
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Figure 2 – Payment – Review Payments – Filter Options

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