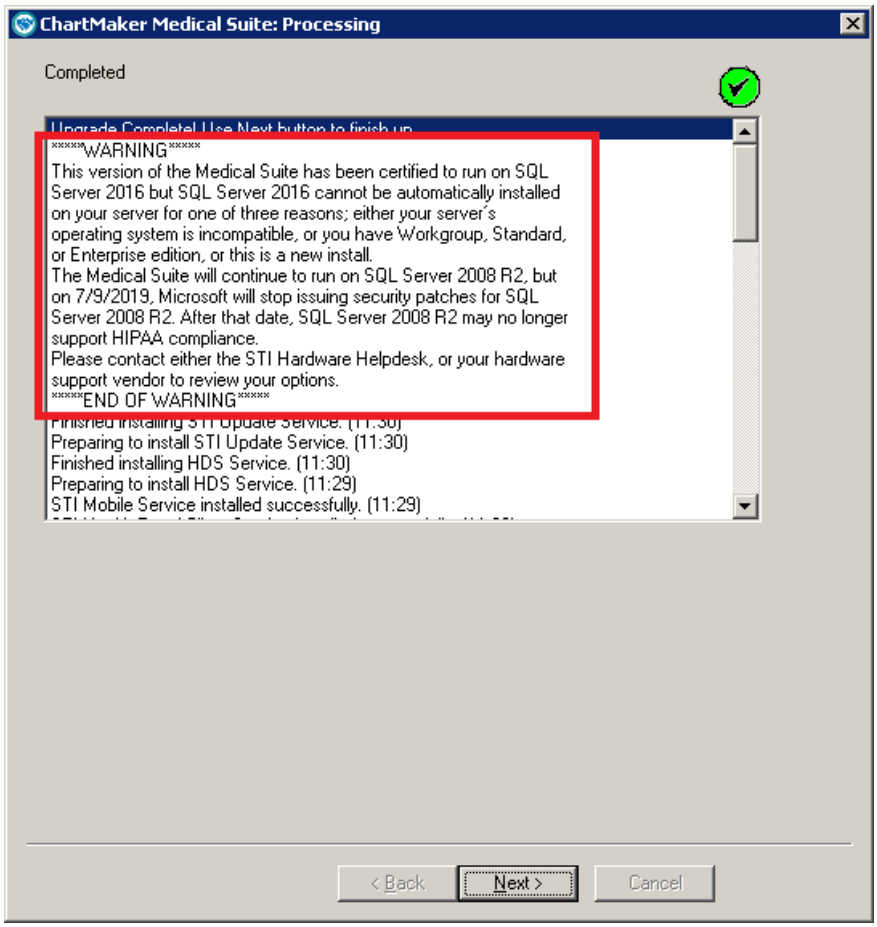
ChartMaker® Clinical Release Notes

ChartMaker® 2018.2 (fv6.4.9)

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, **problems may still arise** 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 **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 HIPPA 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

- **Direct Messaging – To-Do List –** The system has been updated so that when a user receives a To-Do List message indicating that there was an error in sending (due to an incorrect direct messaging address), and they double-click that message, the Direct Message dialog will open that message that errored when sending, and will now contain a **Resend** button, allowing you to correct the address and resend that message. See Figures 1 and 2.

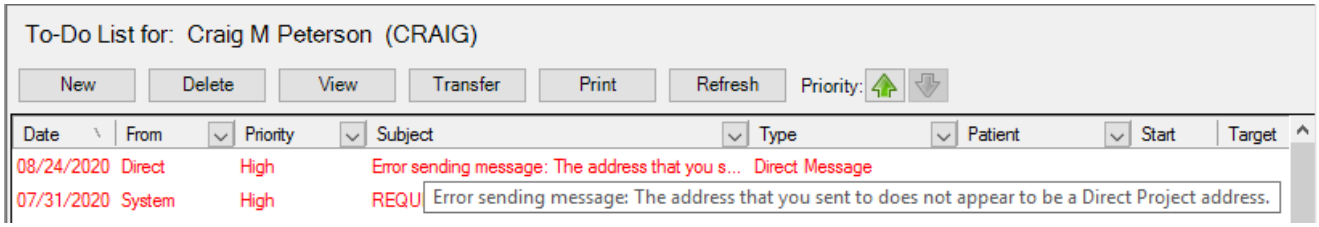


Figure 1 – To-Do List – Direct Message – Error Sending Message

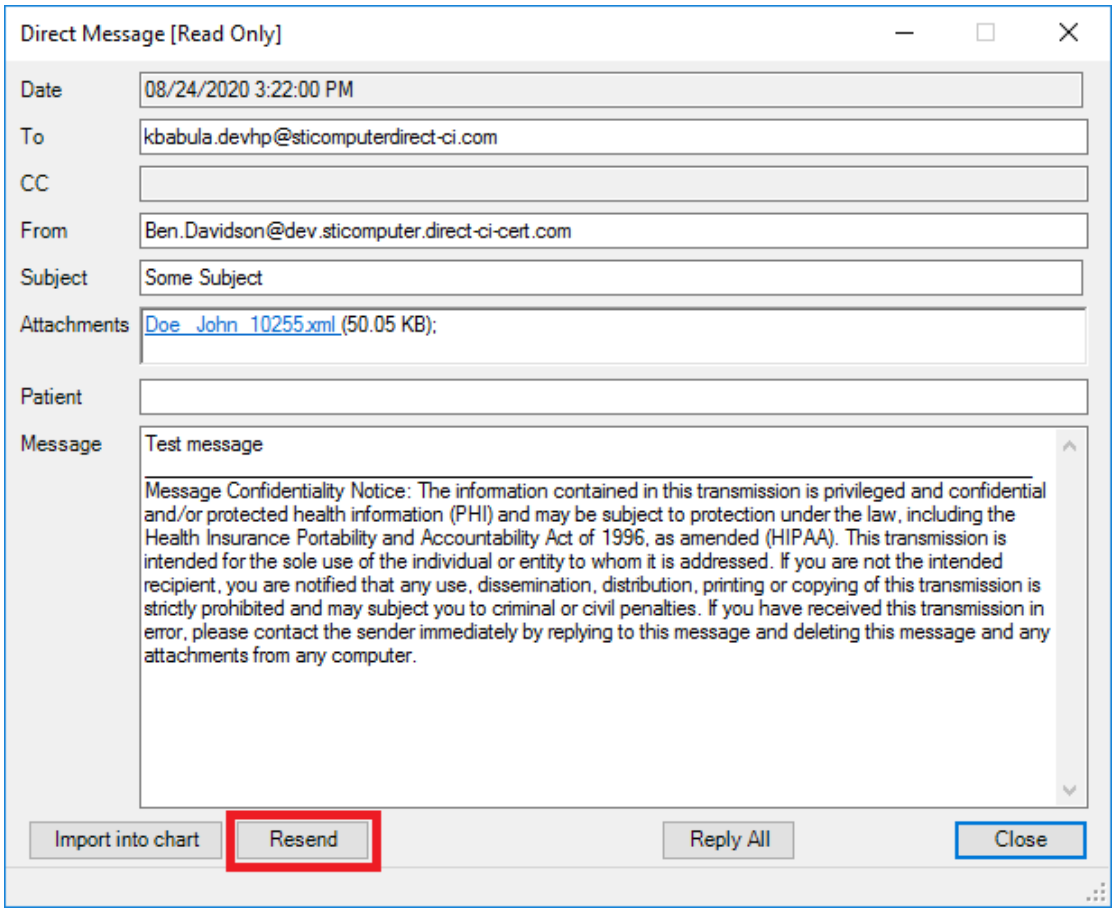


Figure 2 – Direct Message – Resend

Direct Messaging – To-Do List (continued)

After clicking the Resend button, a warning will appear outlining the specific address error, and after you click the **OK** button a New Direct Message dialog will appear. See Figure 3. The **To** field will be the only editable field, as all other fields will be grayed out. You can then modify the incorrect address in the To field, and then click the Send button to resend that message. If the resent message is sent successfully, and contains an attached CDA, the system will then update the numerator count for any applicable Support Electronic Referral Loop measures. *Do note, however, that legacy messages that were sent prior to upgrading can be resent but will **not** be updated in the numerator*.

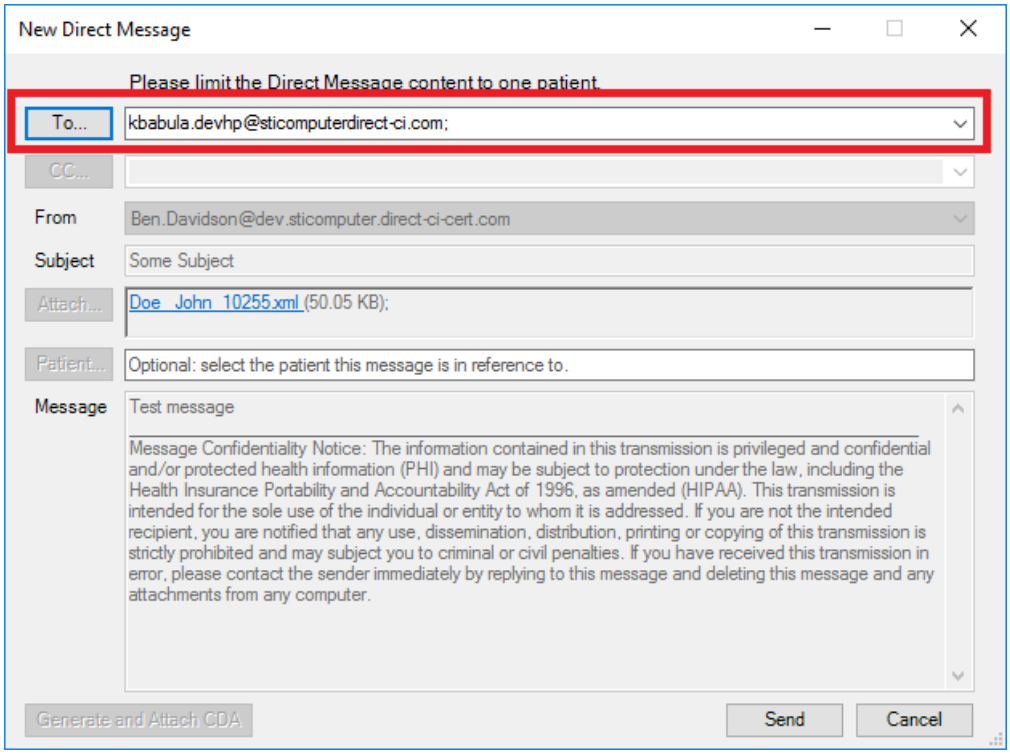


Figure 3– New Direct Message (Resend)

- **Direct Messaging – View Sent Messages –** The Direct Messages Sent dialog (**To-Do** > **Direct Messaging** > **View Sent Messages**) has been updated so that whenever a message has a status of Error, it will appear as a hyperlink. If you double-click the Error link, a Direct Message Error pop-up dialog will appear outlining the specific error for that message. See Figure 4.

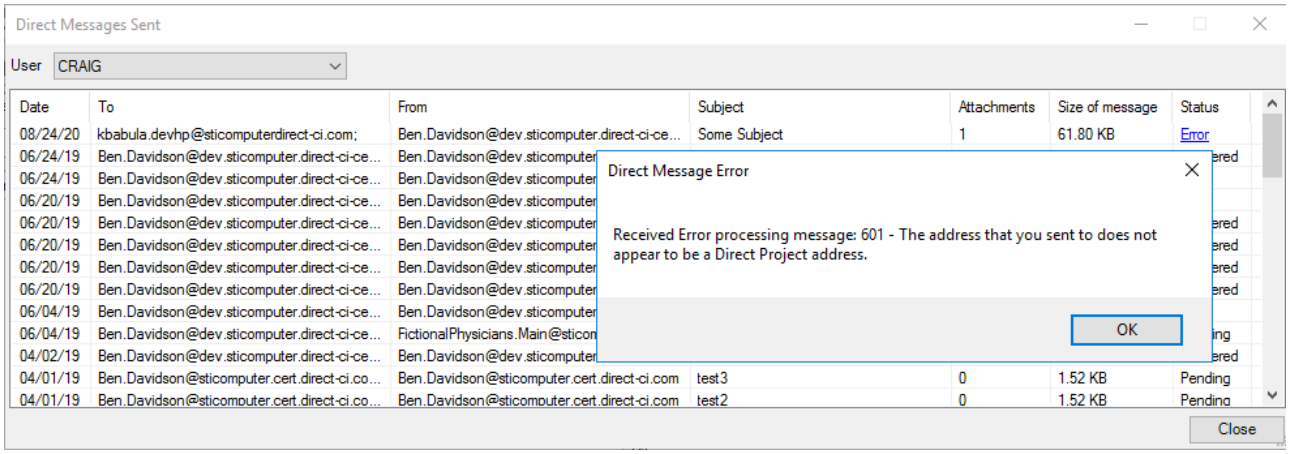


Figure 4– New Direct Message (Resend)

Direct Messaging – View Sent Messages (continued)

Likewise, you can also double-click that message with the Error status, which will access the Direct Message dialog that now has a **Resend** button, allowing you to correct the address and resend that message. See Figure 5.

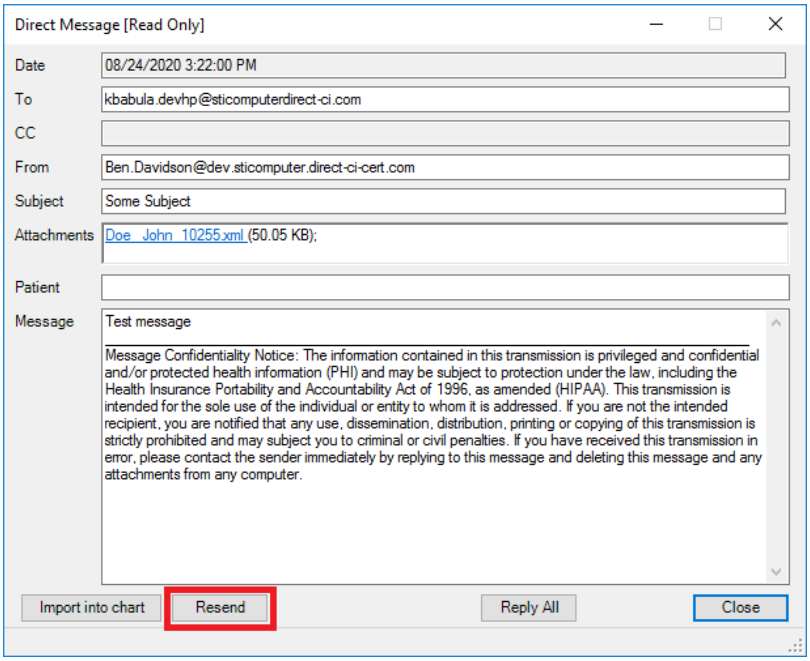


Figure 5 – Direct Message – Resend

After clicking the Resend button, a warning will appear outlining the specific address error, and after you click the **OK** button a New Direct Message dialog will appear. See Figure 6. The **To** field will be the only editable field, as all other fields will be grayed out. You can then modify the incorrect address in the To field, and then click the Send button to resend that message. If the resent message is sent successfully, and contains an attached CDA, the system will then update the numerator count for any applicable Support Electronic Referral Loop measures. *Do note, however, that legacy messages that were sent prior to upgrading can be resent but will **not** be updated in the numerator*.

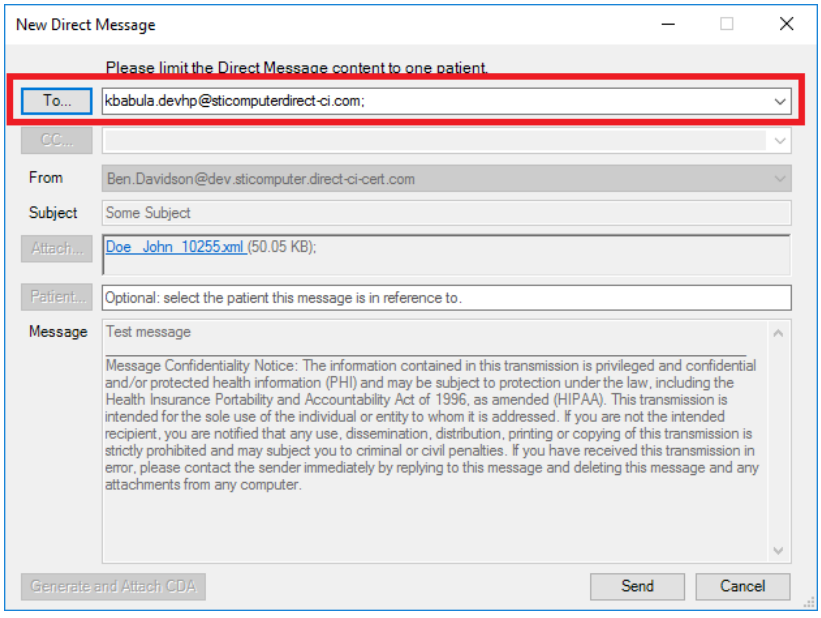


Figure 6– New Direct Message (Resend)

- **Medications – Prescribe Medication – Real Time Formulary–** The Formulary section, in the Prescribe Medication screen, has been updated with **Real Time Formulary** functionality that provides real-time checks of the patient's Formulary data that goes straight to the patient's eligible prescription plans. Thus, patients and prescribing physicians will get the most accurate and up to date Formulary information from Prescription Benefit Manager data direct from the source. Patients will be pleased to see that the Copay and Coverage information that they saw during their visit matches what they see at the pharmacy when they pick up their medications. Likewise, the system will also display alternative medication options such as payer-specified alternatives, and/or therapeutic alternatives based, when available.

  Prior to retrieving the applicable formulary information, a Payer needs to be selected. If a real time formulary response cannot be processed for some reason, the system will generate applicable notification and/or error messages indicating the issue and how to resolve it. Once the formulary data has been received it will populate the Formulary section. See Figure 7. The medications will have a color-coded icon next to them to indicate the selected medication (blue), payer-specified alternative (purple), and/or therapeutic alternative (gray), and the Status column will provide a status rank of the medications. If you click the ⓘ button, a Formulary Legend will appear outlining the various icon details and formulary statuses. See Figure 8. If there is additional Coverage or Copay details available, a **View** link will appear in the corresponding column, which allows access to the Formulary Detail Information dialog outlining the coverage or copay information. See Figure 9.

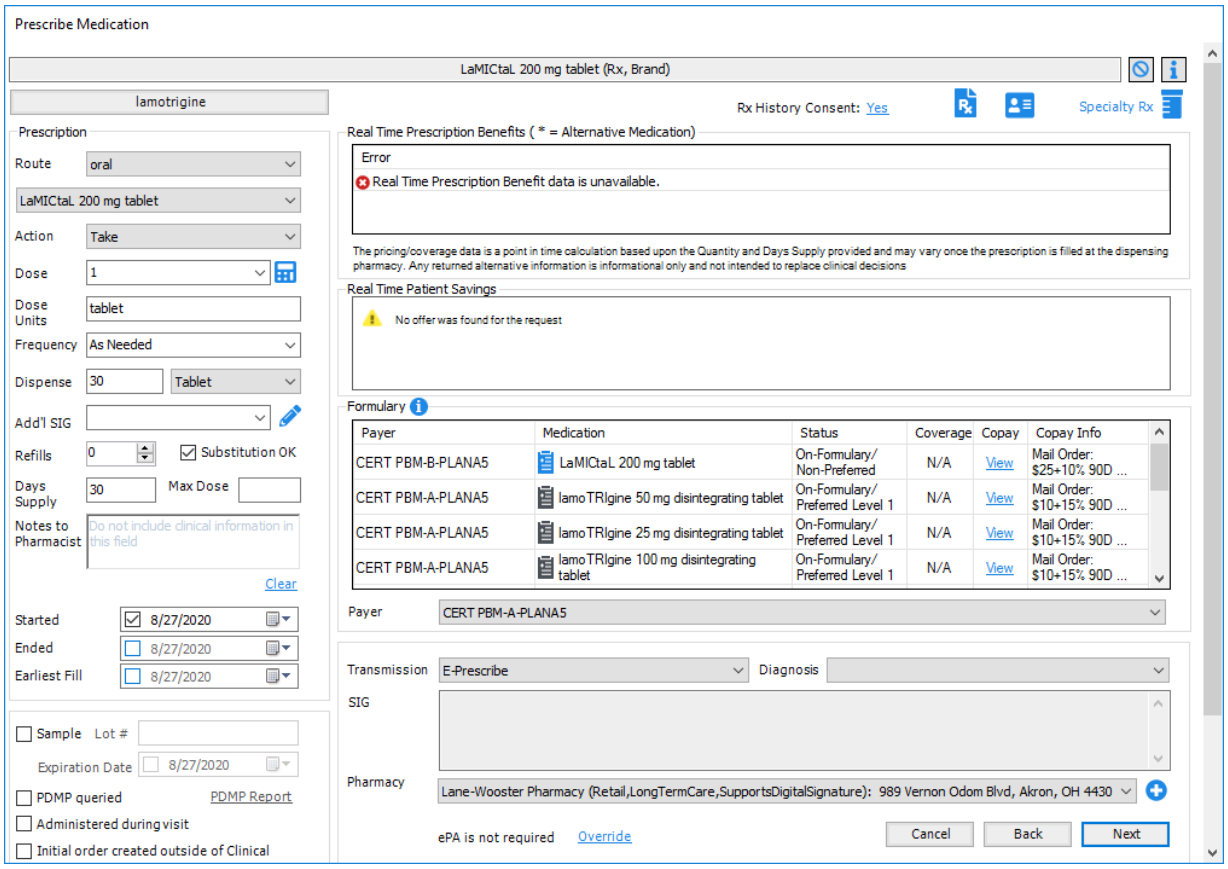


Figure 7 – Prescribe Medication – Real Time Formulary

Medications – Prescribe Medication – Real Time Formulary (continued)

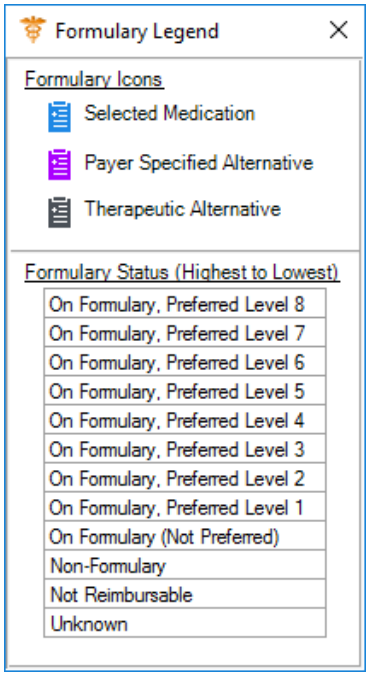


Figure 8 – Formulary Legend

When in the Formulary Detail Information dialog, you can easily view the various coverage or copay information for the alternative medications by selecting the applicable medication in the drop-down list, if available.

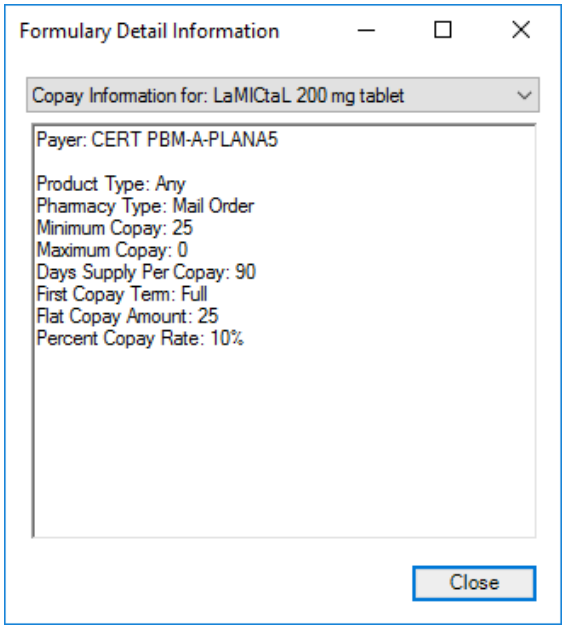


Figure 9 – Formulary Detail Information

Added Features (continued)

- **The Note Tab – Diagnosis –** The **ICD10 Code Set** field, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with an **October 1, 2020 – Sept 30, 2021** code set when searching for diagnosis codes or using the crosswalk functionality. In addition, the ICD10 Search and Crosswalk areas for this new code set have been updated so that whenever a diagnosis is mapped to an HCC (Hierarchical Condition Categories) code, an **(HCC)** indicator will appear after the diagnosis description to easily identify these diagnosis codes. You can toggle between the Oct 1, 2014 – Sept 30, 2016 code set, the Oct 1, 2016 – Sept 30, 2017 code set, the Oct 1, 2017 – Sept 30, 2018 code set, the Oct 1, 2018 – Sept 30, 2019 code set, October 1, 2019 – Sept 30, 2020 code set, and All ICD10 Codes, in addition to this new code set. This allows you to easily search for the applicable ICD10 codes that are active, as outlined by the CDC, for the applicable date ranges. When accessing the Diagnosis Search dialog when adding or editing a diagnosis in the chart note, the system will default to the code set based on the **Note Date** to ensure that the proper ICD codes for that date are selected.

- **The Note Tab – Diagnosis – Note Output –** The system has been updated so that when **Chart Diagnoses** in the Diagnosis Checklist of a patient's chart are noted, by clicking the corresponding **Note Diagnosis** button, those *updated* diagnoses will be outputted in the chart note in the order in which they were first noted. When clicking the **Select All Active** button, they will appear in the order in which they appear in the Chart Diagnoses section. Do note, clicking the corresponding **Undo Noting** button in the Encounter Diagnoses section will change the output ordering. And if that same diagnosis is then again noted it will then appear at the bottom of the sequence at the time of the noting.

- **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 – Note Output –** The note output for procedures has been updated to provide a clearer indication of the information configured for the procedure. To this end, all elements are separated by a comma, except a colon immediately following the procedure name/code, and labels will clearly demarcate the information if data is populated in the applicable fields in the Order Procedure dialog. For example, if there are procedure modifiers selected the output label and text will be "Mod 1: [Modifier and description], Mod 2: [Modifier and description]," etc. If there is data in the Results field the output label and text will be "Results: [text of results]." See Figure 10.

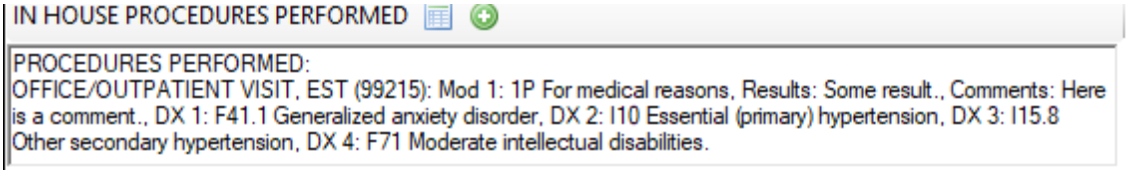


Figure 10 – Note – Procedures – Note Output

- **Organizer – Right-Click Menu –** The Organizer has been updated so that whenever right-clicking an item, or multiple items, the menu will contain a **Fax Selected Note(s)** option allowing you to access the Fax (for OpenText) or Updox Faxing (when Updox is activated) dialog instead of accessing them via **Chart** > **Fax**. See Figure 11. When neither OpenText nor Updox is configured, the Fax Selected Note(s) option in the right-click menu, and the Chart > Fax option, will be grayed out and disabled. See Figure 12.

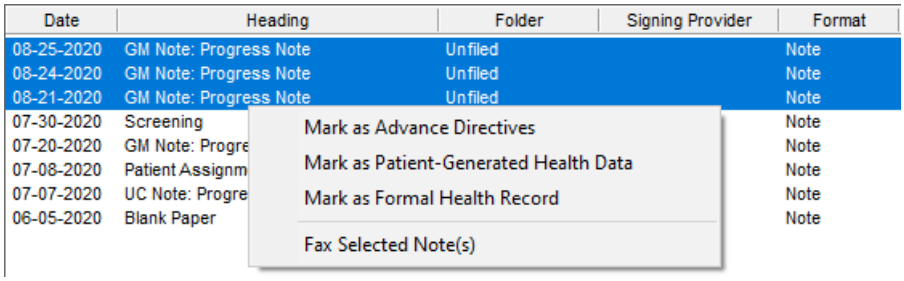


Figure 11 – Organizer – Right-Click Menu – Fax Selected Note(s) Active

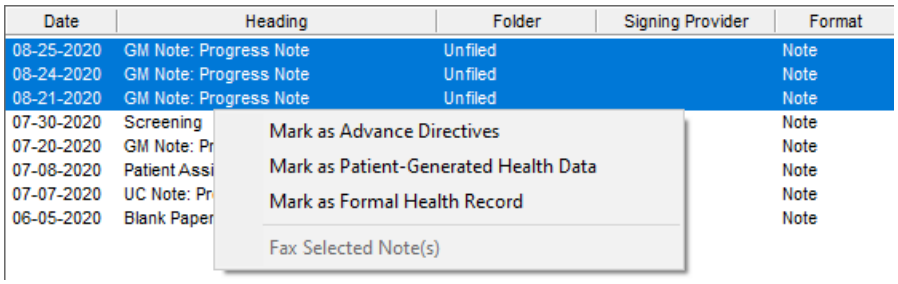


Figure 12 – Organizer – Right-Click Menu – Fax Selected Note(s) Inactive

- **Preferences — Procedures –** The Procedures tab has been updated with a **Procedure Diagnoses** section that allows you to configure how diagnoses attached to a procedure will be displayed in the note output for that procedure (**Display ICD10 Code**, **Display ICD10 Code and description**, or **Do not display diagnosis information**). See Figure 13. The Display ICD10 Code option will be selected as the default.

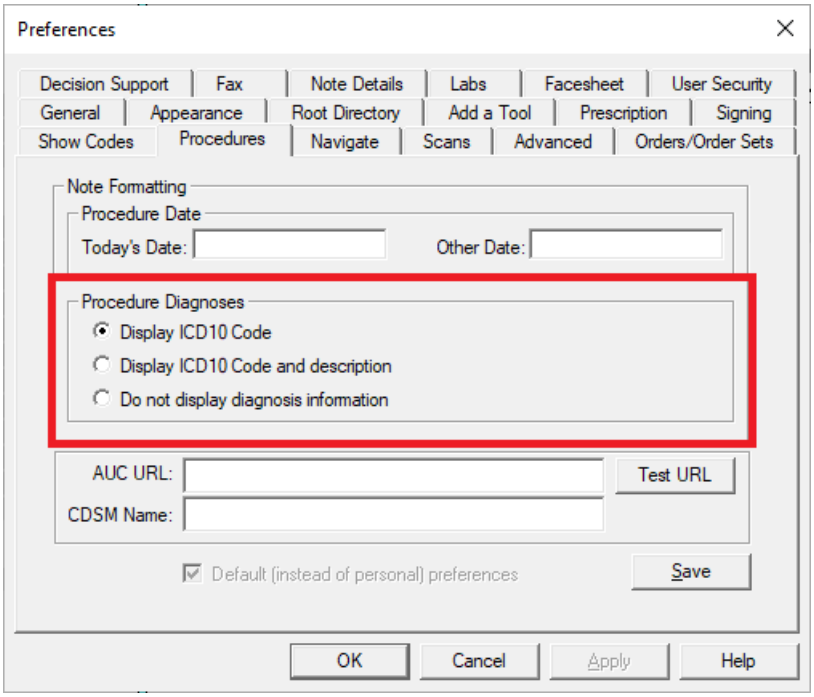


Figure 13 – Preferences – Procedures – Procedure Diagnoses

- **System Tables – Diagnosis Search –** The **ICD10 Code Set** field, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with an **October 1,** 27064**– Sept 30, 2021** code set when searching for diagnosis codes or using the crosswalk functionality. In addition, the ICD10 Search and Crosswalk areas for this new code set have been updated so that whenever a diagnosis is mapped to an HCC (Hierarchical Condition Categories) code, an **(HCC)** indicator will appear after the diagnosis description to easily identify these diagnosis codes. You can toggle between the Oct 1, 2014 – Sept 30, 2016 code set, the Oct 1, 2016 – Sept 30, 2017 code set, the Oct 1, 2017 – Sept 30, 2018 code set, the Oct 1, 2018 – Sept 30, 2019 code set, October 1, 2019 – Sept 30, 2020 code set, and All ICD10 Codes, in addition to this new code set. This allows you to easily search for the applicable ICD10 codes that are active, as outlined by the CDC, for the applicable date ranges. When accessing the Diagnosis Search dialog via the **Edit** > **System Tables** menu, the system will default to the code set based on the current day's date.

- **Template Editing – Dx List** – The **Pre-Existing Diagnoses** label in the Dx Checklist Properties dialog has been changed to **Updated Diagnoses** to better clarify what these types of diagnoses represent and to reduce confusion for multiple meanings. See Figure 14.

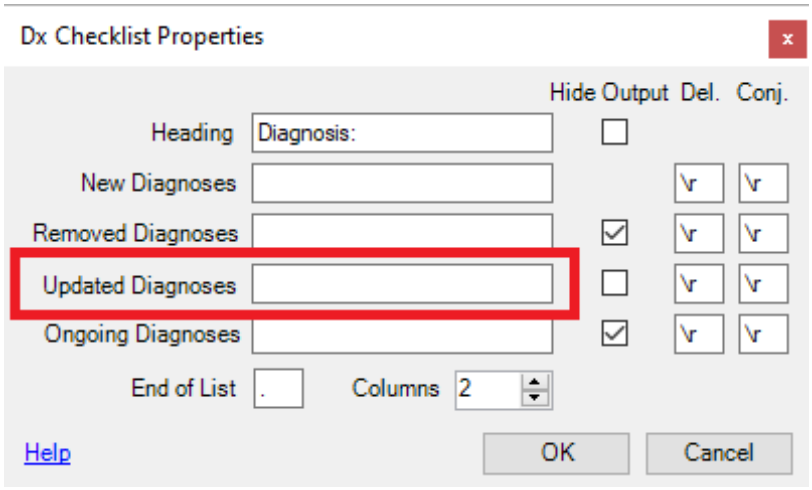


Figure 14 – Dx Checklist Properties

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ChartMaker® Practice Manager Release Notes

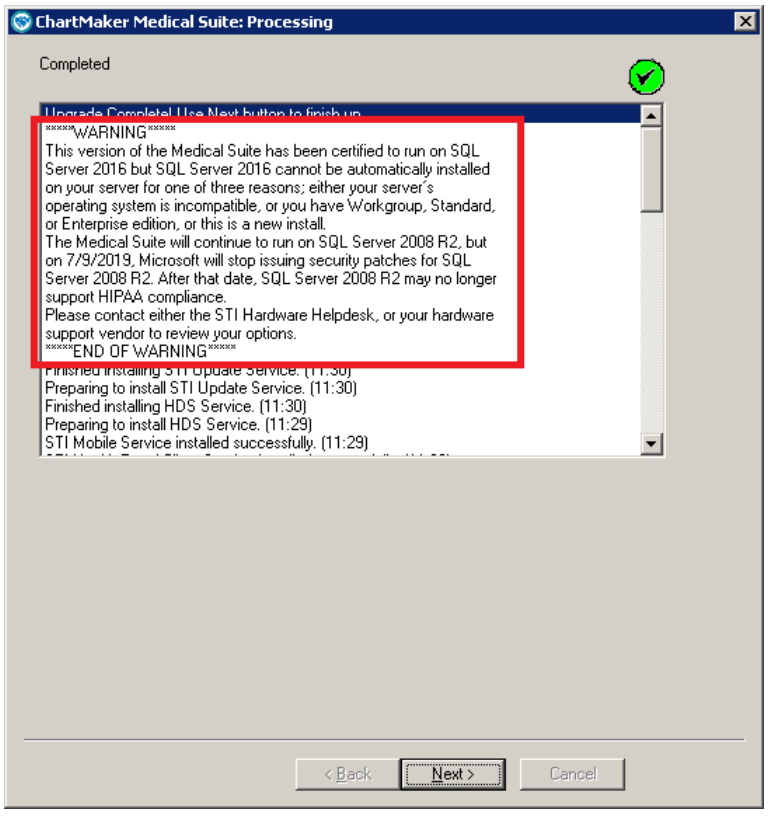
ChartMaker® 2018.2 (fv6.4.9)

Important Notifications

- **Electronic Patient Statements –** If your office sends electronic patient statements (EPS), you must upgrade to CMMS 6.4.5 or later. The 6.4.5 and later versions will resolve the electronic patient statement transmission issue that occurred at the end of February 2020. Please reference the email notification sent to your office on March 3, 2020. Do note that STI handles all updates for Cloud clients.

- **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, **problems may still arise** 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 **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 HIPPA 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

Add-Ins

- **Patient Reminder Module** – The Recalls tab in the Patient Reminder Module dialog (**Add-Ins** > **Patient** > **Patient Reminder Module**) has been updated to allow you to enter a start and end date prior to today's date for the Recall Range for Exports, if needed.

- **Practice Dashboard – Accounts Receivable** – The Practice Dashboard (**Add-Ins** > **Practice Dashboard**) has been updated to allow you to configure a panel to view patient Account Receivable information. When editing or configuring a panel with a category of **Accounts Receivable**, the Panel Configuration Wizard – Select Subcategory screen has been updated with a **By Patient** option which will lets you configure that panel to view account receivable information for patients. See Figure 1. Do note, when the By Patient option is selected, the Gross Receivables option will automatically be selected above, and the Net Receivables option will be grayed out. After the **Next** button is clicked, you can then configure the **Image**, **Label**, **Description**, and **Date Range** in the Panel Configuration Wizard – Configure Panel screen.

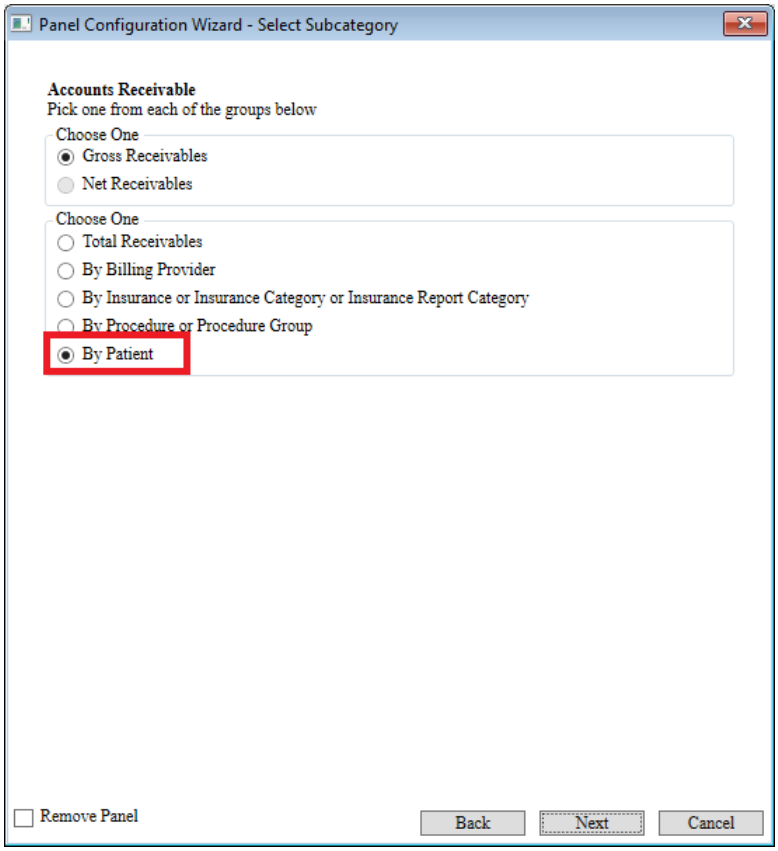


Figure 1 – Panel Configuration Wizard – Select Subcategory (Accounts Receivable)

Administration

- **Administration – Diagnosis Search –** The **ICD10 Code Set** field, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with an **October 1, 2020 – Sept 30, 2021** code set when searching for diagnosis codes or using the crosswalk functionality. In addition, the ICD10 Search and Crosswalk areas for this new code set have been updated so that whenever a diagnosis is mapped to an HCC (Hierarchical Condition Categories) code, an **(HCC)** indicator will appear after the diagnosis description to easily identify these diagnosis codes. You can toggle between the Oct 1, 2014 – Sept 30, 2016 code set, the Oct 1, 2016 – Sept 30, 2017 code set, the Oct 1, 2017 – Sept 30, 2018 code set, the Oct 1, 2018 – Sept 30, 2019 code set, October 1, 2019 – Sept 30, 2020 code set, and All ICD10 Codes, in addition to this new code set. This allows you to easily search for the applicable ICD10 codes that are active, as outlined by the CDC, for the applicable date ranges. When accessing the Diagnosis Search dialog via the **Administration** menu, the system will default to the code set based on the current day's date.

Charge

- **Charge – Enter a Charge** – The **ICD10 Code Set** field, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with an **October 1, 2020 – Sept 30, 2021** code set when searching for diagnosis codes or using the crosswalk functionality. In addition, the ICD10 Search and Crosswalk areas for this new code set have been updated so that whenever a diagnosis is mapped to an HCC (Hierarchical Condition Categories) code, an **(HCC)** indicator will appear after the diagnosis description to easily identify these diagnosis codes. You can toggle between the Oct 1, 2014 – Sept 30, 2016 code set, the Oct 1, 2016 – Sept 30, 2017 code set, the Oct 1, 2017 – Sept 30, 2018 code set, the Oct 1, 2018 – Sept 30, 2019 code set, October 1, 2019 – Sept 30, 2020 code set, and All ICD10 Codes, in addition to this new code set. This allows you to easily search for the applicable ICD10 codes that are active, as outlined by the CDC, for the applicable date ranges. When accessing the Diagnosis Search dialog when entering charges, the system will default to the code set based on the service **Start Date** to ensure that the proper ICD codes for that date are selected.

- **Charge – Edit a Charge** – The **ICD10 Code Set** field, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with an **October 1, 2020 – Sept 30, 2021** code set when searching for diagnosis codes or using the crosswalk functionality. In addition, the ICD10 Search and Crosswalk areas for this new code set have been updated so that whenever a diagnosis is mapped to an HCC (Hierarchical Condition Categories) code, an **(HCC)** indicator will appear after the diagnosis description to easily identify these diagnosis codes. You can toggle between the Oct 1, 2014 – Sept 30, 2016 code set, the Oct 1, 2016 – Sept 30, 2017 code set, the Oct 1, 2017 – Sept 30, 2018 code set, the Oct 1, 2018 – Sept 30, 2019 code set, October 1, 2019 – Sept 30, 2020 code set, and All ICD10 Codes, in addition to this new code set. This allows you to easily search for the applicable ICD10 codes that are active, as outlined by the CDC, for the applicable date ranges. When accessing the Diagnosis Search dialog when entering charges, the system will default to the code set based on the service **Start Date** to ensure that the proper ICD codes for that date are selected.

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 – Diagnosis –** The **ICD10 Code Set** field, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with an **October 1, 2020 – Sept 30, 2021** code set when searching for diagnosis codes or using the crosswalk functionality. In addition, the ICD10 Search and Crosswalk areas for this new code set have been updated so that whenever a diagnosis is mapped to an HCC (Hierarchical Condition Categories) code, an **(HCC)** indicator will appear after the diagnosis description to easily identify these diagnosis codes. You can toggle between the Oct 1, 2014 – Sept 30, 2016 code set, the Oct 1, 2016 – Sept 30, 2017 code set, the Oct 1, 2017 – Sept 30, 2018 code set, the Oct 1, 2018 – Sept 30, 2019 code set, October 1, 2019 – Sept 30, 2020 code set, and All ICD10 Codes, in addition to this new code set. This allows you to easily search for the applicable ICD10 codes that are active, as outlined by the CDC, for the applicable date ranges. When accessing the Diagnosis Search dialog when entering or editing patient information, the system will default to the code set based on the current day's date.

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