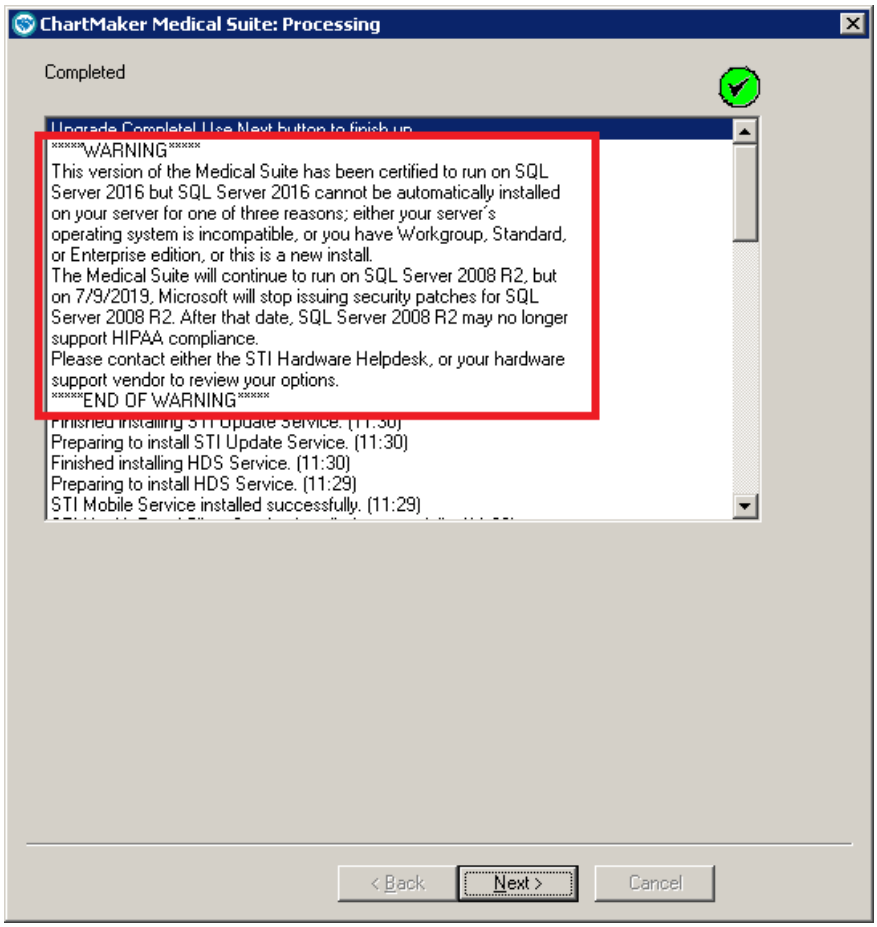
ChartMaker® Clinical Release Notes

ChartMaker® 2018.2 (fv6.5.1)

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 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 – Direct Message Import –** The system has been updated so that when importing a direct message, the direct message import note that is created will not be automatically signed even if the user has signing privileges. This allows you to easily transfer these notes without having to unsign the note prior to transferring them, as in previous versions.

- **Export – All Notes to File –** The export all notes functionality whether accessed via the patient's chart (**Chart** > **Export** > **All Notes to File** or **Chart** > **Export All Notes to File**), or via the right-click menu in the Organizer (**Export Selected Notes to File** or **Export All Chart Notes to File**), has been updated to include the export of Midmark files (**.CAR**), unfinalized custom forms (**.FORM**), and the following types of external documents: **.BMP**, **.HTM**, **.XSL**, and **.ZIP**.

- **The ID Tab – Patient – Additional Information –** The Additional Patient Information dialog (accessed via the Additional Info button), has been updated with a **Previous Address** section allowing you to enter any previous address information for the patient. See Figure 1. When information is added or updated in the Previous Address section, the previous address information will automatically be updated in the Previous Address dialog in Practice Manage (accessed via the Previous Address button in the More Patient Information dialog), and vice versa.

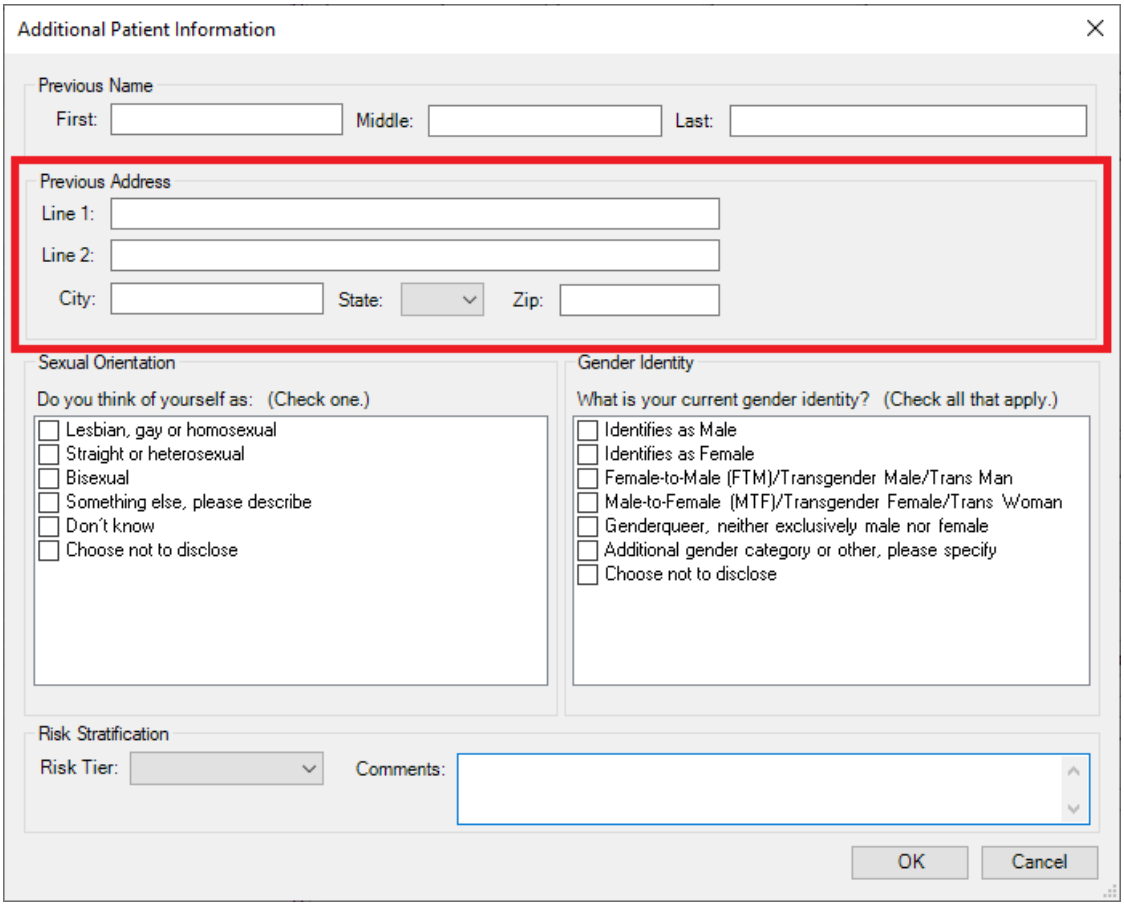


Figure 1 – The ID Tab – Patient – Additional Patient Information

- **Immunization Registry – CT WiZ –** The system has been updated so that when an immunization file is generated for the Connecticut Immunization Information System (CT WiZ) registry, the **RXA.10.13** Identifier Type field (for the Administrating Provider) will contain **NPI**, when the provider has a NPI, or **MD**, when the provider does not have an NPI and the Medical License Number will be sent instead.

Added Features (continued)

- **The Note Tab – Diagnosis* –** The **October 1, 2020 – Sept 30, 2021** code set, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with six new diagnosis codes that the CDC (Centers for Disease Control) has implemented to identify conditions resulting from COVID-19, and are effective on January 1, 2021. These new ICD10 codes are: **Z11.52** (Encounter for screening for COVID-19), **Z20.822** (Contact with and (suspected) exposure to COVID-19) **Z86.16** (Personal history of COVID-19), **M35.81** (Multisystem inflammatory syndrome (MIS)), **M35.89** (Other specified systemic involvement of connective tissue), and **J12.82** (Pneumonia due to coronavirus disease 2019). These new codes can be selected and used, as needed.

  * This feature was released in the CMMS 6.5.1.398 hot fix release.

- **Preferences — Orders/Order Sets –** The **Orders** section, of the **Orders/Order Sets** tab, has been updated with a new **Include electronic signature of Referrals** option. See Figure 2. When this option is selected, any electronic signature that is configured for the provider will be printed on the **Provider Signature** line in the Referral form. If an electronic signature is not configured for the provider, then the Provider Signature line will appear blank.

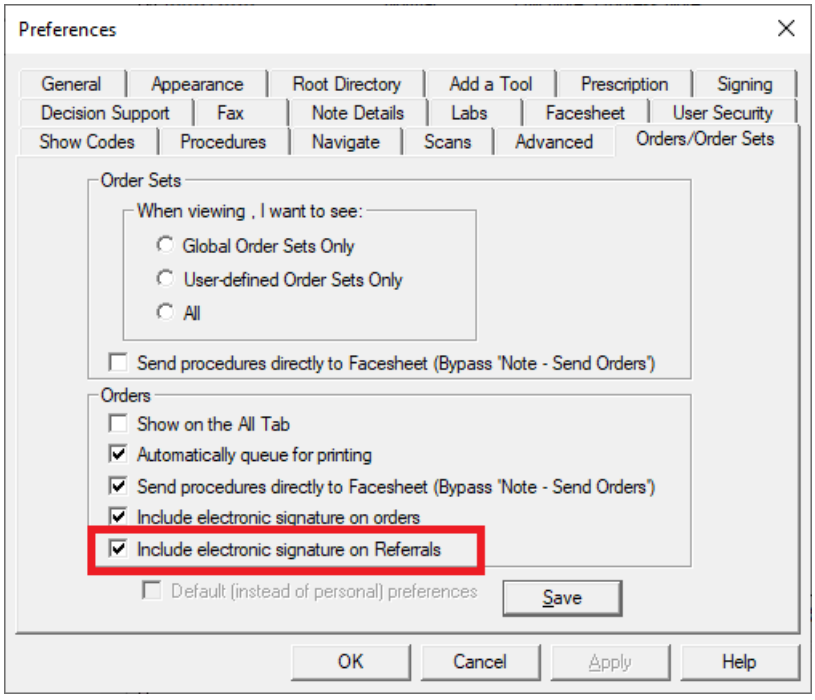


Figure 2 – Preferences – Orders/Order Sets

- **System Tables – Diagnosis Search –** The **October 1, 2020 – Sept 30, 2021** code set, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with six new diagnosis codes that the CDC (Centers for Disease Control) has implemented to identify conditions resulting from COVID-19, and are effective on January 1, 2021. These new ICD10 codes are: **Z11.52** (Encounter for screening for COVID-19), **Z20.822** (Contact with and (suspected) exposure to COVID-19) **Z86.16** (Personal history of COVID-19), **M35.81** (Multisystem inflammatory syndrome (MIS)), **M35.89** (Other specified systemic involvement of connective tissue), and **J12.82** (Pneumonia due to coronavirus disease 2019). These new codes can be selected and used, as needed.

  * This feature was released in the CMMS 6.5.1.398 hot fix release.

Added Features (continued)

- **Template Editing – Checklist** – The **Include as** drop-down list in the **Finding Check List Properties** dialog has been updated to include an **Assessment and Plan** option. See Figure 3. When this option is selected for a checklist, any data entered in the checklist will be pulled into any CCDA document type that has an Assessment and Planning section.

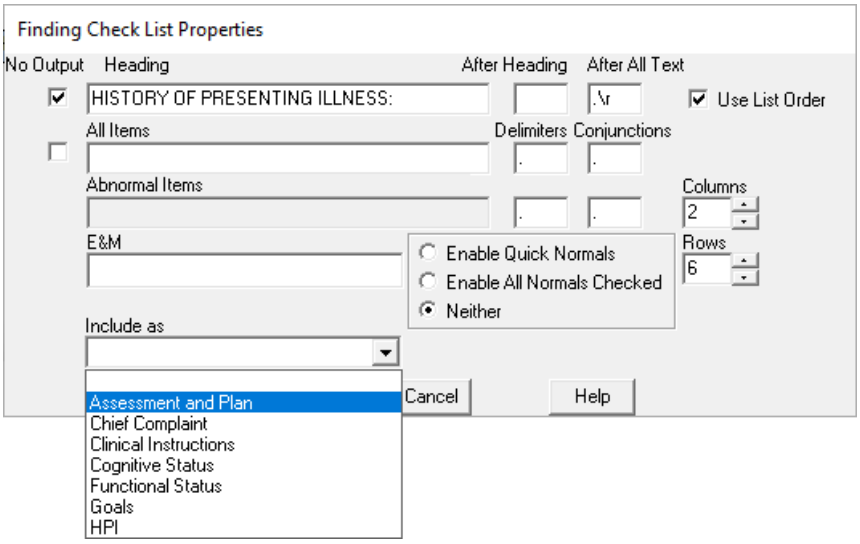


Figure 3 – Finding Check List Properties

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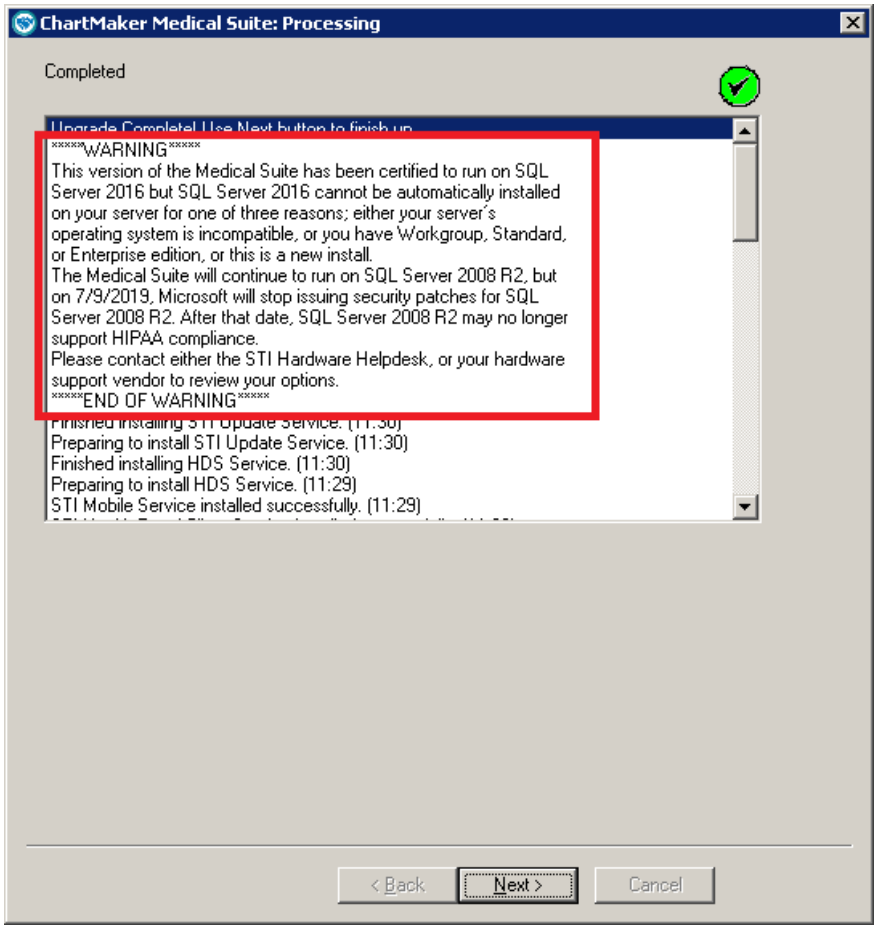
ChartMaker® Practice Manager Release Notes

ChartMaker® 2018.2 (fv6.5.1)

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 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

Administration

- **Administration – Preferences – System Level Preferences –** The program has been updated so that when the **Auto-populate Patient Reminder preferences** option is selected in the **Patient Related** section, of the **Patient** tab of the Maintain System Default Preferences dialog, the system will default any **Email**, primary cell (**Primary number**), primary home (**Secondary number**), and primary work (**Tertiary number**) phone numbers, as well as check the **Phone calls allowed** and **Text messages allowed** options in the Patient Reminder Preferences dialog (accessed via the Patient Reminders button in the Patient screen) when the corresponding information is entered and saved for a **NEW** temporary patient in the Appointment screen (created by **N** + **Enter**). Likewise, these preferences will be carried forward when these NEW temporary patient accounts are activated with a permanent account number in the Patient screen.

- **Administration – Preferences – Practice Level Preferences –** The program has been updated so that when the **Auto-populate Patient Reminder preferences** option is selected in the **Patient Related** section, of the **Patient** tab of the Maintain Practice Preferences dialog, the system will default any **Email**, primary cell (**Primary number**), primary home (**Secondary number**), and primary work (**Tertiary number**) phone numbers, as well as check the **Phone calls allowed** and **Text messages allowed** options in the Patient Reminder Preferences dialog (accessed via the Patient Reminders button in the Patient screen) when the corresponding information is entered and saved for a NEW temporary patient in the Appointment screen (created by **N** + **Enter**). Likewise, these preferences will be carried forward when these **NEW** temporary patient accounts are activated with a permanent account number in the Patient screen.

- **Administration – Diagnosis Search* –** The **October 1, 2020 – Sept 30, 2021** code set, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with six new diagnosis codes that the CDC (Centers for Disease Control) has implemented to identify conditions resulting from COVID-19, and are effective on January 1, 2021. These new ICD10 codes are: **Z11.52** (Encounter for screening for COVID-19), **Z20.822** (Contact with and (suspected) exposure to COVID-19) **Z86.16** (Personal history of COVID-19), **M35.81** (Multisystem inflammatory syndrome (MIS)), **M35.89** (Other specified systemic involvement of connective tissue), and **J12.82** (Pneumonia due to coronavirus disease 2019). These new codes can be selected and used, as needed.

Charge

- **Charge – Enter a Charge*** – The **October 1, 2020 – Sept 30, 2021** code set, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with six new diagnosis codes that the CDC (Centers for Disease Control) has implemented to identify conditions resulting from COVID-19, and are effective on January 1, 2021. These new ICD10 codes are: **Z11.52** (Encounter for screening for COVID-19), **Z20.822** (Contact with and (suspected) exposure to COVID-19) **Z86.16** (Personal history of COVID-19), **M35.81** (Multisystem inflammatory syndrome (MIS)), **M35.89** (Other specified systemic involvement of connective tissue), and **J12.82** (Pneumonia due to coronavirus disease 2019). These new codes can be selected and used, as needed.

- **Charge – Edit a Charge*** – The **October 1, 2020 – Sept 30, 2021** code set, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with six new diagnosis codes that the CDC (Centers for Disease Control) has implemented to identify conditions resulting from COVID-19, and are effective on January 1, 2021. These new ICD10 codes are: **Z11.52** (Encounter for screening for COVID-19), **Z20.822** (Contact with and (suspected) exposure to COVID-19) **Z86.16** (Personal history of COVID-19), **M35.81** (Multisystem inflammatory syndrome (MIS)), **M35.89** (Other specified systemic involvement of connective tissue), and **J12.82** (Pneumonia due to coronavirus disease 2019). These new codes can be selected and used, as needed.

* This feature was released in the CMMS 6.5.1.398 hot fix release.

Clinical

- **Clinical – Immunization – Immunization Registry – CT WiZ** – The system has been updated so that when an immunization file is generated for the Connecticut Immunization Information System (CT WiZ) registry, the **RXA.10.13** Identifier Type field (for the Administrating Provider) will contain **NPI**, when the provider has a NPI, or **MD**, when the provider does not have an NPI and the Medical License Number will be sent instead.

Inquire

- **Inquire – Payments –** The **Payments** tab of the **Inquire** screen has been updated with a **Include Incentive Payments** view that allows you to easily balance payment totals for EOB checks that include CO-144 incentive payments. See Figure 1. In this new view, the **Amount Paid** will reflect the payment line item amount plus any incentive payment for that item, allowing you to easily balance those payment totals in the EOB.

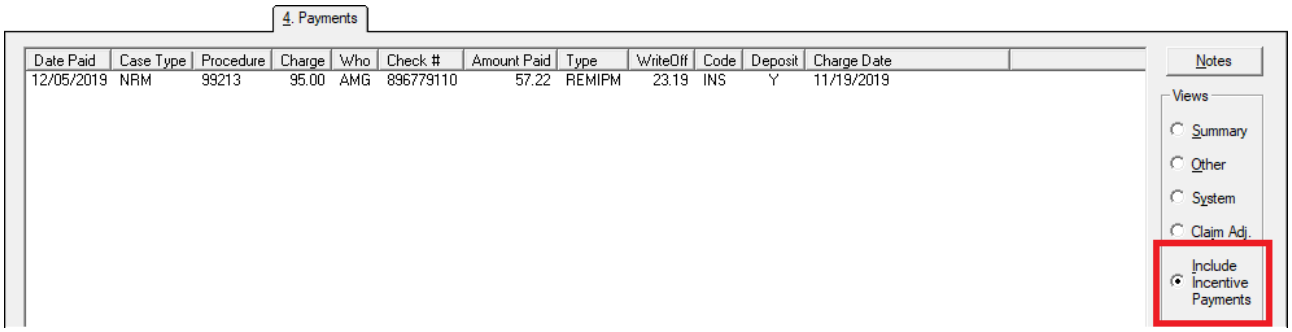


Figure 1 – Inquire – Payment – Include Incentive Payments

Patient

- **Patient – Case – Diagnosis* –** The **October 1, 2020 – Sept 30, 2021** code set, in the ICD10 Search and Crosswalk areas of the Diagnosis Search dialog, has been updated with six new diagnosis codes that the CDC (Centers for Disease Control) has implemented to identify conditions resulting from COVID-19, and are effective on January 1, 2021. These new ICD10 codes are: **Z11.52** (Encounter for screening for COVID-19), **Z20.822** (Contact with and (suspected) exposure to COVID-19) **Z86.16** (Personal history of COVID-19), **M35.81** (Multisystem inflammatory syndrome (MIS)), **M35.89** (Other specified systemic involvement of connective tissue), and **J12.82** (Pneumonia due to coronavirus disease 2019). These new codes can be selected and used, as needed.

  * This feature was released in the CMMS 6.5.1.398 hot fix release.

- **Patient – Other – More Patient –** The **More Patient Information** dialog has been updated with a **Previous Address** button that accesses a **Previous Address** dialog, allowing you to enter any previous address information for the patient. See Figure 2. When information is added or updated in the Previous Address dialog, the previous address information will automatically be updated in the Previous Address section of the Additional Patient Information dialog (accessed via the Additional Info button in the Patient section of the ID tab), and vice versa.

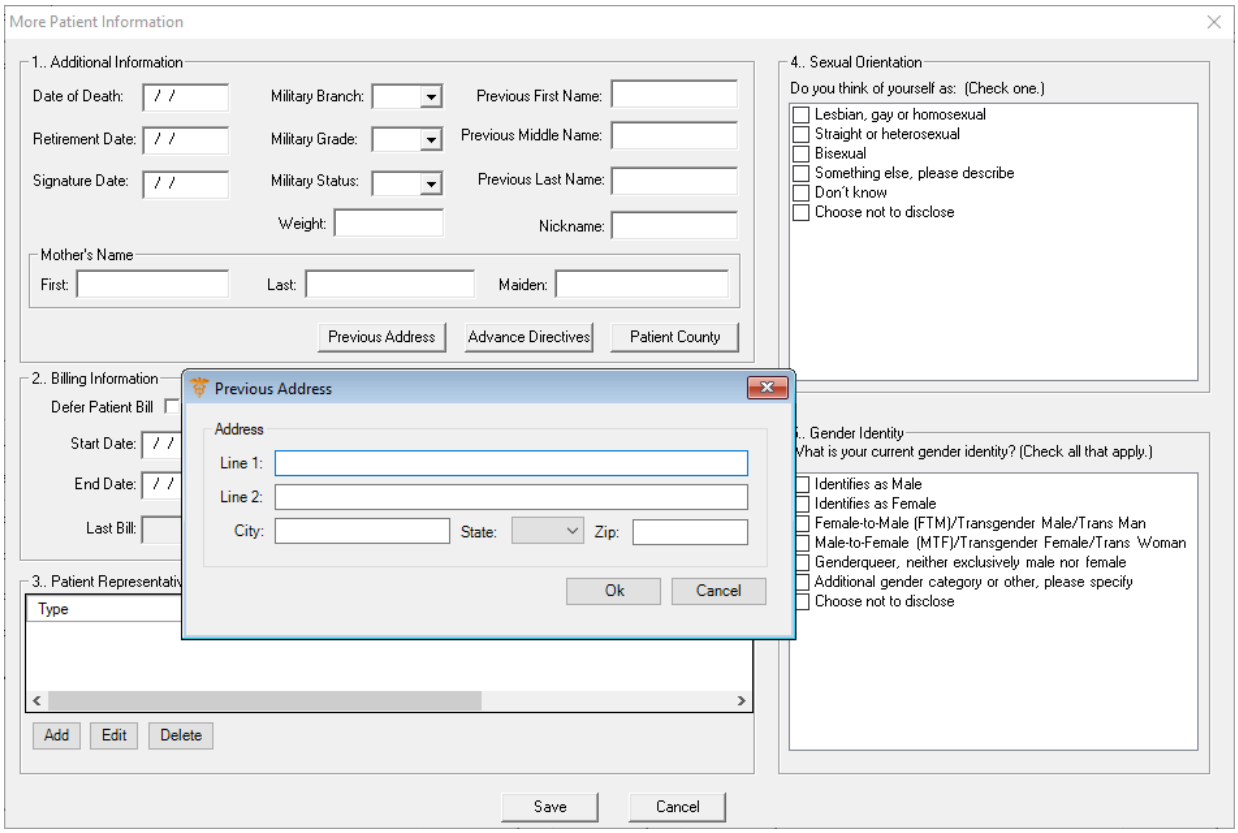


Figure 2 – More Patient Information – Previous Address

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