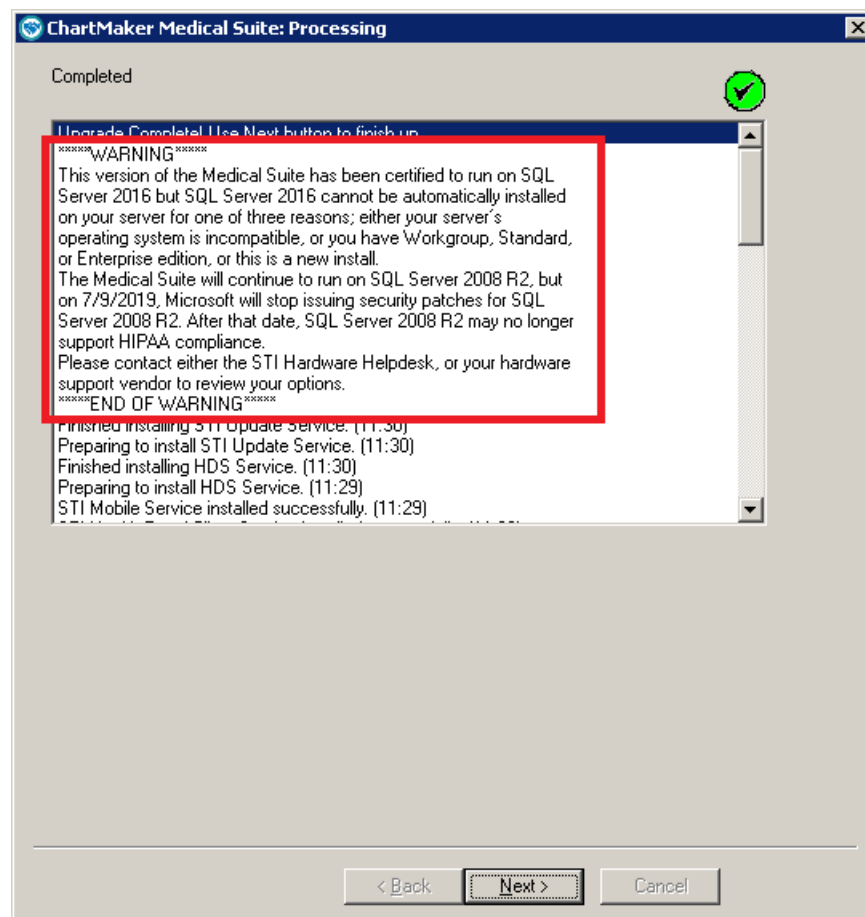


ChartMaker® Clinical Release Notes

ChartMaker® 2018.2 (fv6.6.1)

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 – Generate and Attach CDA** – In previous versions, an issue could arise when sending a direct message when a manually added medication is included in the CDA, causing the direct message to fail. This issue has been corrected.
- **Direct Messaging – Generate and Attach CDA** – In previous versions, an issue could arise when sending a direct message where an error message would be generated where the "displayName" is invalid. This issue has been corrected.
- **Direct Messaging – Import into Chart** – In previous versions, an issue could arise causing the system to crash when attempting to reconcile diagnoses in the Clinical Information Reconciliation (CIR) dialog after a direct message has been imported into a chart note. This issue has been corrected.
- **Export – Note to File** – In previous versions, an issue could arise where certain notes were not able to be exported to PDF with an error reason of "Corrupt note - contains no information to export." This issue has been corrected.
- **MIPS Dashboard – Quality** – In the previous version, the numerator was not calculating correctly for the **CMS 165 Controlling High Blood Pressure**, **CMS 68 Documentation of Current Medications in the Medical Record**, and **CMS 2 Preventive Care and Screening: Screening for Depression and Follow-Up Plan** quality measures for MIPS 2022. This issue has been corrected.
- **The Note Tab – Implantable Device** – The program has been updated with the latest schema (Version 2) when retrieving device information from the FDA. This will allow you to enter a **Device UDI** and **Verify UDI with FDA** and have the applicable FDA information populate without receiving an Error Receiving Data message indicating that the implantable Device SNOMED CT Service is unavailable at this time. [PBI 31223]

Added Features (continued)

- **The Note Tab – Order Procedure** – The Order Procedure dialog has been updated to automatically populate up to 5 diagnoses, that were added or noted in the current chart note, in the Procedure Diagnoses list when the **Auto-Populate 'Procedure Diagnoses' Section** preference is active for the user. See Figure 1. Encounter Diagnoses will appear first in the order in which they were added, then Chart Diagnoses that were noted will appear in the order in which they were noted. The diagnoses that appear in the Procedure Diagnoses list can be modified manually as needed.

Additionally, the diagnoses in the drop-down list will be ordered where Encounter Diagnoses will appear first in the order in which they were added, then Chart Diagnoses will appear in the order in which they were noted, and then those chart diagnoses that were not noted in the current chart note will appear. This change is independent of whether the preference is active or not.

Likewise, with this this change, the Procedure Diagnoses section has been enlarged so that all 5 diagnoses can be displayed without scrolling. To accommodate this, the Result, Comment, Priority, and Target fields have been moved to the top-right of the dialog, above the SNOMED Selection section.

The screenshot shows the 'Order Procedure' dialog box. The 'Procedure' field is set to 'OFFICE/OUTPATIENT VISIT, EST' and the 'Order Date' is '04/26/2022 13:26:19'. The 'Procedure Diagnoses (select 5 max.)' section is highlighted with a red box and contains a table with 3 rows:

#	ICD10	Description
1	J09.X1	Influenza due to identified novel influenza A virus with pneumonia
2	I10	Essential (primary) hypertension
3	F41.1	Generalized anxiety disorder

Below the table are buttons for adding, removing, and editing diagnoses. To the right of the dialog, the 'Result', 'Priority', 'Routine', 'Stat', 'Comment', and 'Target' fields are visible, along with the 'SNOMED Selection' section.

Figure 1 – Order Procedure – Procedure Diagnoses

- **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.

Added Features (continued)

- **Preferences — Procedures** — The **Procedures** tab, of the Preferences dialog, has been updated with a new **Order Procedure Screen** section that contains a new **Auto-Populate 'Procedure Diagnoses' Section** preference that allows you to have the system prepopulate up to 5 diagnosis codes, that were added or noted in the current chart note, in the Procedure Diagnoses list in the Order Procedure dialog when adding or ordering a procedure. See Figure 2. This new preference will be active (checked) by default and is a user-specific preference. Likewise, the Procedure Diagnoses section has been relabeled to **Diagnoses** and the preferences in that section have been reorganized, however, the functionality in this section remains the same as in previous versions.

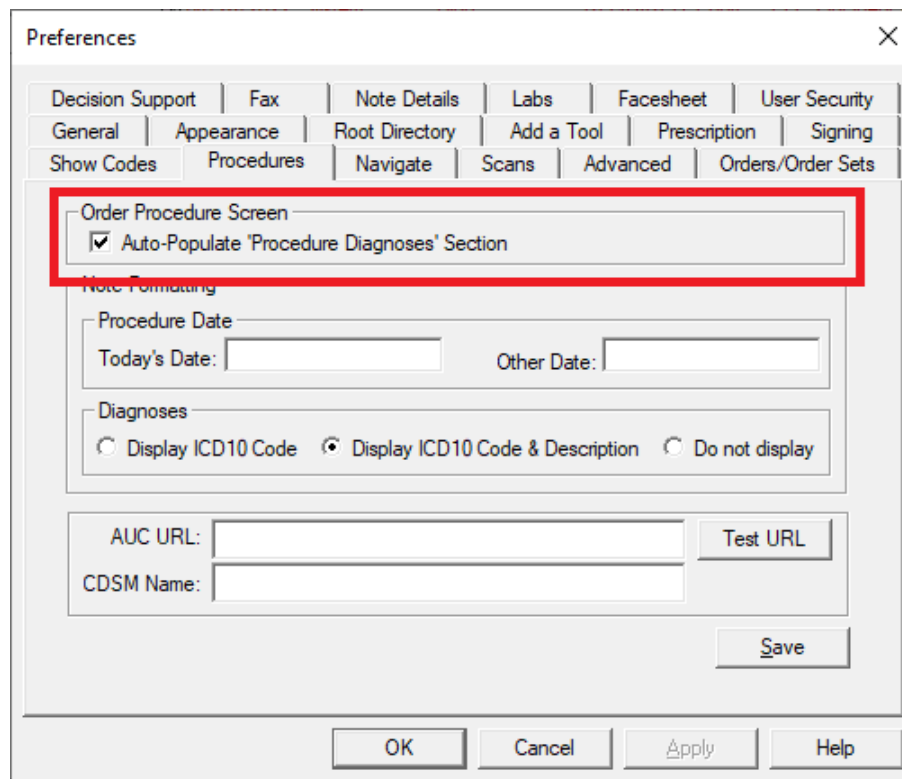


Figure 2 – Preferences – Procedures

- **The To-Do List — Reminders** — In previous versions, an issue could arise where a To-Do List reminder is not being generated for a user when a note is transferred from another user to them. This issue arises when the initial user deletes a To-Do List reminder for a chart note, and then transfers that note to another user. This issue has been corrected and the To-Do List reminder will be generated for these situations.

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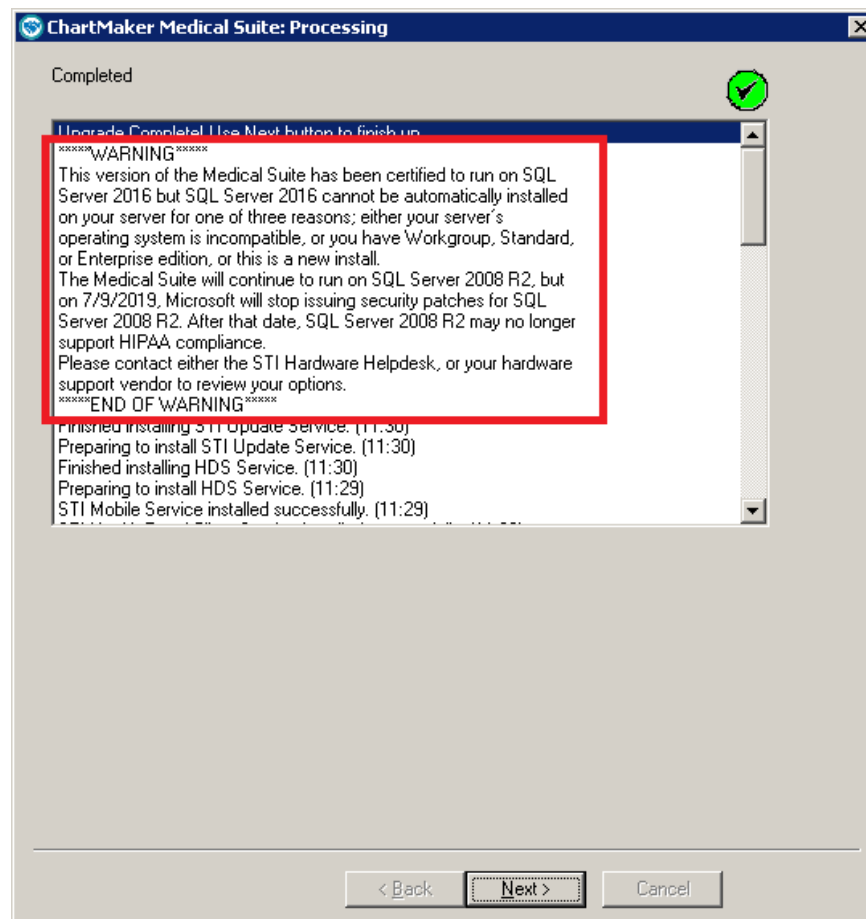
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ChartMaker® Practice Manager Release Notes

ChartMaker® 2018.2 (fv6.6.1)

Important Notifications

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ChartMaker Medical Suite SQL Server 2016 Warning

Appointment

- **Appointment – Select Patient** – In previous versions, an issue could arise when changing the **State** for the patient's address where a Zip Code-City-State combination already exists in the system, causing an ODBC Error. This issue has been corrected, and whenever an attempted change to the State field is made when an existing Zip Code-City-State combination exists, the system will generate a warning message indicating that this change cannot be made when an existing Zip Code-City combination is already attached to a State. If the zip code record needs to be updated, it will need to be done via the Zip Code/Country utility (accessed via Administration > Practice Tables > Zip Code/Country). See Figure 1.

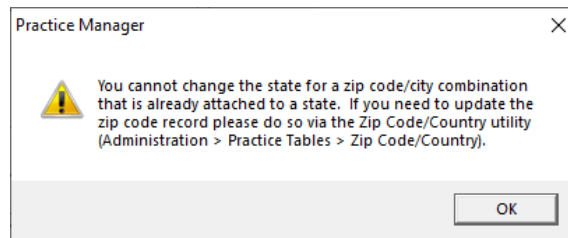


Figure 1 – Zip Code Warning Message

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.

Documents

- **Documents – Statements** – In previous versions, the system would display charges that are paid in full and have a zero balance on Statements printed via **Documents > Statements**. This has been corrected.

Patient

- **Patient – Name Address** – In previous versions, an issue could arise when changing the **State** for the patient's address where a Zip Code-City-State combination already exists in the system, causing an ODBC Error. This issue has been corrected, and whenever an attempted change to the State field is made when an existing Zip Code-City-State combination exists, the system will generate a warning message indicating that this change cannot be made when an existing Zip Code-City combination is already attached to a State. If the zip code record needs to be updated, it will need to be done via the Zip Code/Country utility (accessed via Administration > Practice Tables > Zip Code/Country). See Figure 2.

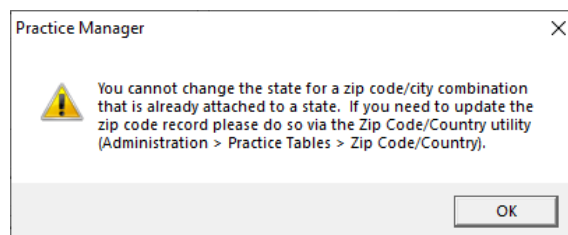


Figure 2 – Zip Code Warning Message

Patient (continued)

- **Patient – Case – Responsible Party** – The Primary and Secondary tabs in Responsible Party dialog (accessed via the Responsible Party field by pressing F2), have been updated with a **Cell** and an **Email** field, allowing you to enter the responsible party's cell phone number and email address. See Figure 3.

Responsible Party - Fictional Physicians - RP10006

Primary - Doe | Secondary | Responsible Party | Patient Statement Format

1.. Name and Address

Sal: [] First: [] Middle: [] Last: Doe Suffix: []

Address 1: 63 Main Street ERA 2nd Address: []

Address 2: []

Zip Code: 13219 City: Syracuse State: NY

Country: USA

Home: (315) 488-1518 [] Work: () - []

Cell: () - []

2.. Additional Information

Sex: U DOB: / / SSN: - -

Mar Status: [] Emp Status: [] Employer: []

Email: []

Save Cancel Change To Company Clear BP Member Notes

Figure 3 – Responsible Party – Person

Likewise, if you click the **Change to Company** button in either Primary or Secondary tab, Cell and Email fields are also available allowing you to enter that information for responsible parties that are entities instead of a person. See Figure 4.

Responsible Party - Fictional Physicians - RP10006

Primary | Secondary | Responsible Party | Patient Statement Format

1.. Name and Address

Name: []

Address 1: []

Address 2: []

Zip Code: - City: [] State: []

Phone: () - [] Fax: () - []

Email: [] Cell: () - []

Save Cancel Change To Person Clear BP Member Notes

Figure 4 – Responsible Party – Company

Payment

- **Payment – Enter Credits** – The Enter Credits tab has been updated so that the Pending Payments section will include any pending payments, regardless of whether there are open charges or not, thereby allowing you to create a credit for any pending payment.

Remittance

- **Remittance – Import Remittance Files** – In previous version, an issue could arise when importing and posting a large remittance check causing a Data Truncated error message. This issue has been corrected.

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