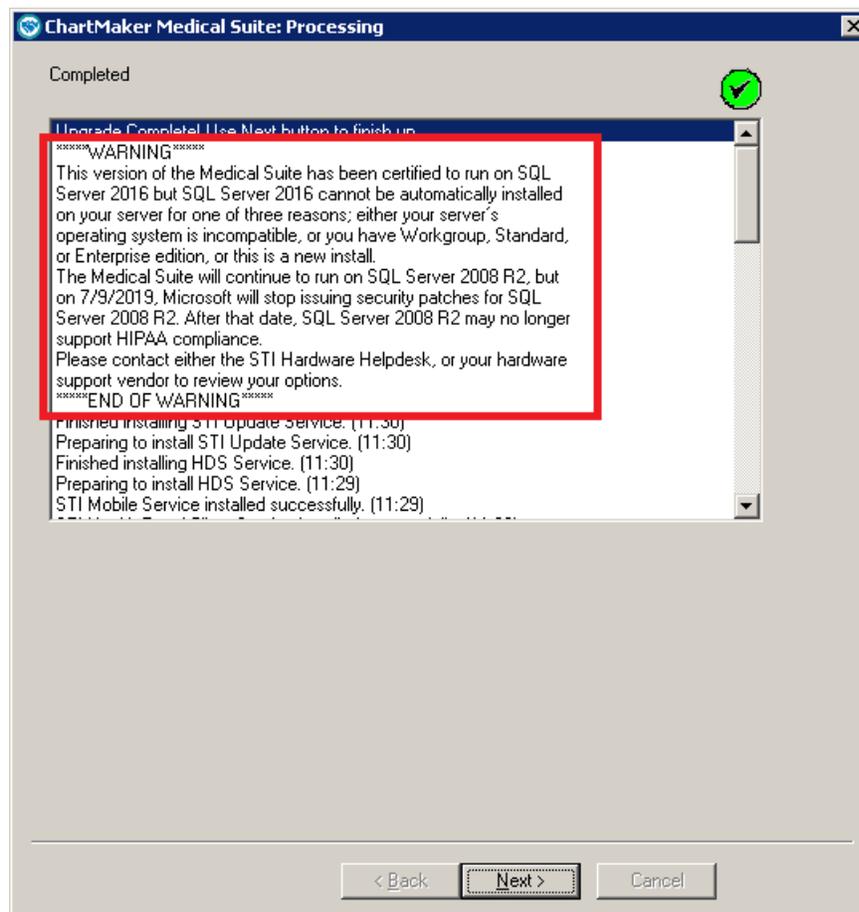


## ChartMaker® Clinical Release Notes

ChartMaker® 2018.2 (fv6.4.8)

### 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 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

- **Audit Trail** – The Audit Trail has been updated to track whenever a fax was sent successfully to Updox. When an audit event occurs, the Event column will display **Fax**; the Group column will display **Note**; the Audit Trail Description will display **Updox Fax Sent**; and the patient's **Account ID**, the **Updox Fax ID**, the recipient name (**To**), **Fax#** of the recipient, **Doc Name** and Date of note/external file, and the **Note ID** will be listed in the Metadata column. Do note, that an audit event will appear for each recipient and each note/external document sent for the fax. Also note, sending a successful fax to Updox does not verify that the fax was successfully transmitted to the fax recipient. To verify the transmission to the recipient, you must check the MyUpdox web interface.
- **Audit Trail** – The Audit Trail has been updated to track whenever a fax failed to be sent successfully to Updox. When an audit event occurs, the Event column will display **Fax**; the Group column will display **Note**; the Audit Trail Description will display **Updox Fax Failed**; and the patient's **Account ID**, the **Updox Response Code/Message**, the recipient name (**To**), **Fax#** of the recipient, **Doc Name** and Date of note/external file, and the **Note ID** will be listed in the Metadata column. Do note, that an audit event will appear for each recipient and each note/external document that failed to send for the fax.
- **Audit Trail** – The Audit Trail has been updated to track whenever the **Do not export unsigned results** option is checked in the Patient Access dialog (accessed via the Patient Access button in the patient's facesheet). When an audit event occurs, the Event column will display **Export**; the Group column will display **Patient**; the Audit Trail Description will display **Suspend document export for unsigned results to API and PatientPortal**; and the patient's **Account ID** will be listed in the Metadata column.
- **Audit Trail** – The Audit Trail has been updated to track whenever the **Do not export unsigned results** option is unchecked in the Patient Access dialog (accessed via the Patient Access button in the patient's facesheet). When an audit event occurs, the Event column will display **Export**; the Group column will display **Patient**; the Audit Trail Description will display **Document export has been enabled for unsigned results to API and PatientPortal**; and the patient's **Account ID** will be listed in the Metadata column.
- **The Note Tab – Patient Assignment** – The Denominator Exception section of the Patient Assignment dialog has been updated with a note to better clarify the function of this exception and what this exception specifically relates to and affects. See Figure 1. As outlined in the note, this exception is valid only for **Stage 3 Meaningful Use only (Reports > Meaningful Use > Dashboard)** and does not apply to any MIPS performance measures.

The image shows a screenshot of a software dialog box titled "Patient Assignment". The dialog box contains several questions with radio button options. The "Denominator Exception" section is highlighted with a red border. Below this section is a note explaining the exception's validity.

**Patient Assignment**

Please answer these questions so that the Performance Measures for Importing Transition of Care into patient's chart and performing Clinical Information Reconciliation can be calculated appropriately.

Has this patient transitioned from another care setting?  
 Not Asked  Yes  No

Has this patient been referred by another provider?  
 Not Asked  Yes  No

Is this a new patient?  
 Not Asked  Yes  No

**Denominator Exception**  
Did you attempt to import a TOC from an HIE without success, or ask the referring provider for a TOC and did not receive one?  
 Not Asked  Yes  No

Note: This exception is valid for Stage 3 Meaningful Use only. It does not apply to any MIPS Performance Category Measures.

OK Cancel

Figure 1 – Patient Assignment – Denominator Exception

## Added Features (continued)

- **The Note Tab – Screening – Depression, Anxiety and Stress Scale (DASS21)** – The Screening dialog has been updated with a **Depression, Anxiety and Stress Scale (DASS21)** questionnaire that is accessed by clicking the corresponding button at the top of the dialog. See Figure 2. After the questionnaire is accessed, you can configure the answers for the various questions (**Applied to me very much or most of the time, Applied to me a considerable degree or a good part of the time, Applied to me to some degree or some of the time, and Did not apply to me at all**). The 21 questions have a measured **Depression Total Score, Anxiety Total Score, and Stress Total Score** based on the answered questions above that allows you to quickly determine the severity of each, and you can click each corresponding link to view information on how the score was calculated and the score scale. In addition, you can also determine how this information is outputted to the note. You can choose to output the **Title only, List** or **Paragraph** format, or **Title & Score**. When information is configured in the Screening dialog, the information will appear in the History tab for the patient.

Screening

Social, Psychological and Behavioral Quick Depression Assessment Panel (PHQ9) Generalized Anxiety Disorder (GAD7)  
Falls Risk Assessment Form Blessed Orientation Memory Concentration Test (Cognitive Assessment)  
**Depression, Anxiety and Stress Scale (DASS21)**

10. I felt that I had nothing to look forward to	Did not apply to me at all
11. I found myself getting agitated	Applied to me a considerable degree or a
12. I found it difficult to relax	Applied to me a considerable degree or a
13. I felt down-hearted and blue	Applied to me to some degree or some o
14. I was intolerant of anything that kept me from getting on with what I was doing	Applied to me very much or most of the t
15. I felt I was close to panic	Applied to me to some degree or some o
16. I was unable to become enthusiastic about anything.	Applied to me a considerable degree or a
17. I felt I wasn't worth much as a person	Applied to me to some degree or some o
18. I felt that I was rather touchy	Applied to me very much or most of the t
19. I was aware of the action of my heart in the absence of physical exertion (eg. sense of heart rate increase, heart missing a beat)	Applied to me a considerable degree or a
20. I felt scared without any good reason	Applied to me to some degree or some o
21. I felt that life was meaningless	Applied to me very much or most of the t

[Depression Total Score : 20](#)  
[Anxiety Total Score : 20](#)  
[Stress Total Score : 28](#)

Note Output  
 Title only  List  Paragraph  Title & Score

OK Cancel

Figure 2 – Screening – Depression, Anxiety and Stress Scale

## Added Features (continued)

- **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 3. Do note, both the right-click menu in the Organizer and the Chart > Fax option will be disabled if neither OpenText nor Updox is configured in the system.

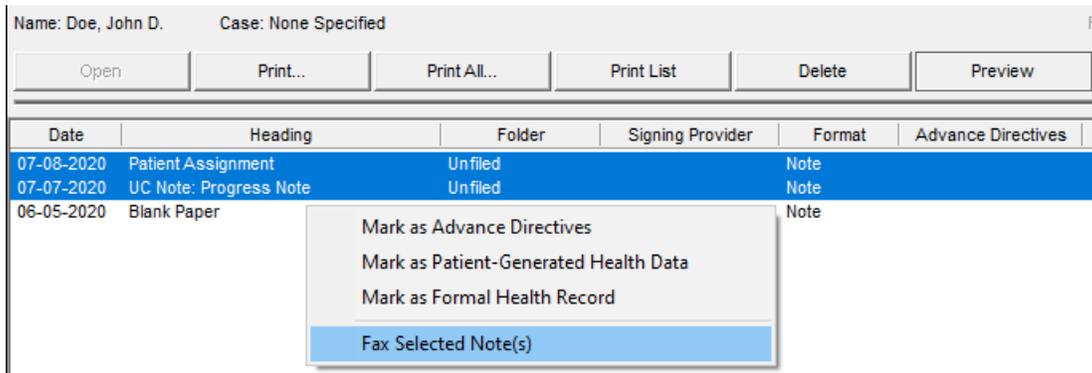


Figure 3 – Organizer – Right-Click Menu

- **Organizer – Updox Faxing** – The system has been updated with a new user-friendly interface that allows you to easily send faxes with Updox. Please note that this new feature requires operating systems of Windows 10 (or above) for PCs and laptops, and Windows Server 2016 (or above) for servers.

When the Updox Faxing Credentials preference is configured (see the Preferences – Fax entry below), whenever you choose to fax valid notes and documents (CPN, ICPN, Lab, Scan, PDF) from the Organizer, either via the right-click menu, or via **Chart > Fax** option, the Updox Faxing dialog will appear allowing you configure Sender Information, a Cover Sheet, Documents to be Faxed, and the Recipients. See Figure 4. A warning message will appear prior to accessing the Updox Faxing dialog if any invalid documents (unfinalized custom forms, midmark files, Flexforms) were selected. The applicable invalid documents will be listed and will be removed if you choose to continue with the faxing. Likewise, you will also get a similar warning if you are running an unsupported operating system.

When first accessing the Updox Faxing dialog, the **From** field, in the **Sender Information** section, will contain the user that is currently logged in, and if the system has any practices that have fax numbers for which the user is linked, the **Use Practice Fax** radio button will be checked by default. If the system does not have any practices with fax numbers, the **Use Other Fax** radio button will be checked by default. If the user has previously sent a fax, the last used fax number will be selected in either the Use Practice Fax drop-down or in the Use Other Fax text box. You can modify the various fields in the Sender Information section as needed.

The **Cover Sheet** section allows you to select whether to add a cover sheet to the fax. The **Use cover sheet** option will default checked. When using the cover sheet you can use a generic Medical Fax header, or you can select to use a practice that the selected user is associated within the **Header** drop-down. You can then enter an applicable **Subject** (up to 100 characters) and any **Comments** (1024-character limit) as needed. A Disclaimer will also be included on the cover sheet that cannot be edited. The information configured in this section, as well as the Sender Information and Selected Recipients sections will comprise the information in the cover sheet (Header, From, To, Subject, Date, Comments, and Disclaimer) and will appear as the first page of the fax document.

The **Documents to be Faxed** section will contain any valid files that were selected in the Organizer. You can also add additional external PDF files by clicking the **Browse** button. All the documents checked in this section will be sent with fax. You can uncheck documents as needed.

The bottom section of the dialog allows you to select recipients of the fax. You can select from **Patient Referring Physicians** (those referring physicians associated with the patient's chart), **Referring Physicians** (allows you to search and select those referring physicians in the ChartMaker Medical Suite), or **Additional Recipients** (manually added recipients). Recipients in these sections are selected into, as well as removed from, the **Selected Recipients** section, using the applicable arrow buttons between these areas.

## Added Features (continued)

### Organizer – Updox Faxing (continued)

When all the applicable information has been configured as desired, you can click the **Send** button to send the fax to the selected recipients. Do note that there is a 400 page and 40MB size limit for sending faxes via Updox. If the fax exceeds either of these limitations a warning will appear outlining the issue and how to remedy the issue.

When a fax is sent successfully to Updox, or when a fax failed to send to Updox, a confirmation or error message will appear. Do note, however, that sending a successful fax to Updox does not verify that the fax was successfully transmitted to the fax recipients. To verify the transmission to the recipient, you must check the MyUpdox web interface.

The screenshot displays the 'Updox Faxing' window with the following sections:

- Sender Information:** 'From' is set to 'John Doe'. 'Use Practice Fax' is selected with the number '315-468-0977 (Fictional Physicians)'. 'Use Other Fax' is unselected with a blank field.
- Cover Sheet:** 'Use cover sheet' is checked. 'Header' is 'Default - MEDICAL FAX'. 'Subject' is 'Enter your Subject Here'. 'Comments' is 'Enter any additional comments for your cover sheet.' A disclaimer is provided below.
- Documents To Be Faxed:** A table with columns 'Selected', 'Document', and 'Visit Date'.

Selected	Document	Visit Date
<input checked="" type="checkbox"/>	Patient Assignment	7/8/2020 4:10 PM
<input checked="" type="checkbox"/>	UC Note: Progress Note	7/7/2020 11:19 AM
- Recipient Selection:** 'Browse' is used to select recipients. 'Patient Referring Physicians' is selected. A table shows 'Selected Recipients':

Name	Fax Number	Phone Number
Doe, Jane A MD	315-468-0977	
Smith, Sam	315-746-2232	

'Send' and 'Close' buttons are at the bottom right.

Figure 4 – Updox Faxing

- **Patient Access** – In conjunction with the 21st Century Cures Act (21CCA), specifically as it details requirements against Information Blocking, the system has been updated so that on November 1, 2020 and after, any electronic results (lab, radiology, etc.) that are received into the ChartMaker Medical Suite will be automatically transferred to the applicable patient's PatientPortal and/or API without needing to be viewed or signed by the provider, if they are activated for Patient Access. Likewise, whenever an unmatched result has been matched to a specific patient, those results will automatically be sent to the applicable patient's PatientPortal and/or API without needing to be viewed or signed by the provider, if that patient is activated for Patient Access.

## Added Features (continued)

### Patient Access (continued)

After the note has been reviewed and signed by the provider, if any comments were added prior to signing, then after signing the system will then automatically resend and replace the results on the patient's PatientPortal and/or API that were automatically sent prior to signing (i.e., the original unsigned results) with an updated note that contains those results and the additional comments, and the patient will be sent a notification that changes were made. If the note does not contain any comments or changes, upon signing no additional exports or notifications will be sent.

There are, however, exceptions to automatically sending electronic results that can be manually configured on a patient basis, should a medical decision be made that it is in the patient's best interest to not automatically send these results. Do note that these exceptions must comply with those exception cases outlined in the 21st Century Cures Act (21CCA), as actors (i.e., providers) can be penalized for conducting information blocking practices that do not comply with those outlined in the final rule.

To this end, the Patient Access dialog (accessed via the **Patient Access** button in the patient's facesheet) has been updated with a **Do not export unsigned results** option. See Figure 5. When this option is checked, the system will **not** automatically send unsigned results to the patient's PatientPortal and/or API. Do note that a warning message outlining the ramifications of checking this option will be generated when you click the **OK** button (see Figure 6), and the system will also track whenever this option is checked or unchecked in the audit trail. When this option is activated, the system will behave as in previous versions where results, notes, labs, and scans are sent to the patient's PatientPortal and/or API upon signing (unless, of course, if the **Do not export on note, lab and scan signing** option is checked).

Patient Access

PatientPortal account settings

Registration status:

Send an authorization email to the patient for PatientPortal registration.

or

Print authorization instructions for the patient to manually register on the PatientPortal.

API Access

Enable this patient for API access

Authentication code: FictionalDrsUed8Dasc

Print this patient's authentication code.

Send an email to this patient with their authentication code.

Generate a new authentication code for this patient.

Do not export unsigned results

Do not export on note, lab and scan signing

Status Legend

- PatientPortal and API are not enabled
- PatientPortal enabled and API is not enabled or PatientPortal not enabled and API is enabled
- PatientPortal pending and API not enabled
- PatientPortal is pending and API is enabled
- PatientPortal and API are enabled
- PatientPortal and API have note data not being sent (suspended)

[Help](#)

Figure 5 – Patient Access

## Added Features (continued)

### Patient Access (continued)

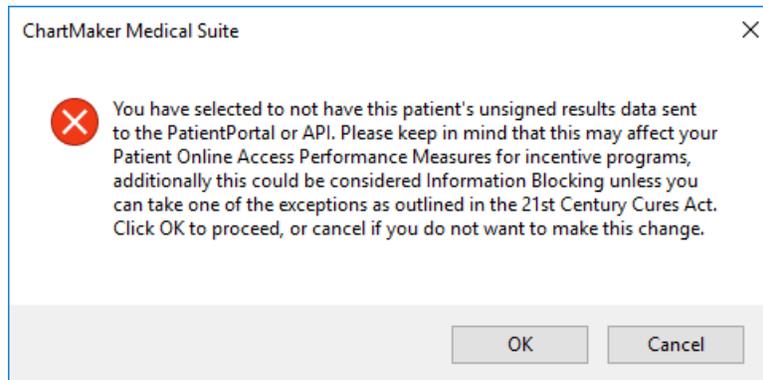


Figure 6 – Patient Access– Do Not Export Unsigned Results Warning

If the **Do not export on note, lab and scan signing** option is checked, and the **Do not export unsigned results** option is not checked, when you click the **OK** button a warning message will be generated indicating that there is a conflict and you will not be able to continue until both options are checked. See Figure 7. However, the **Do not export unsigned results** option can be checked with the **Do not export on note, lab and scan signing** option not being checked.

Also note, any patient that has the **Do not export on note, lab and scan signing** option checked, when upgrading to this version, the system will automatically check the **Do not export unsigned results** option for that patient, as it is assumed since the patient is not receiving exports when signing should not receive exports for unsigned results.

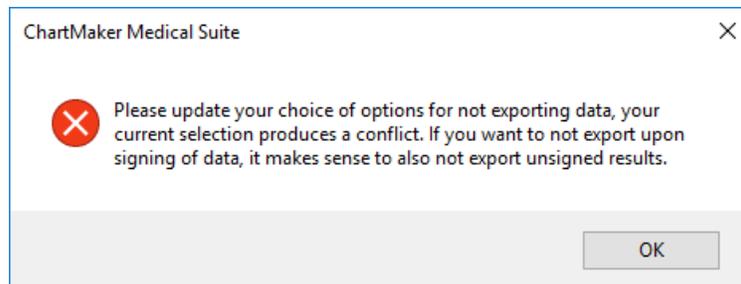
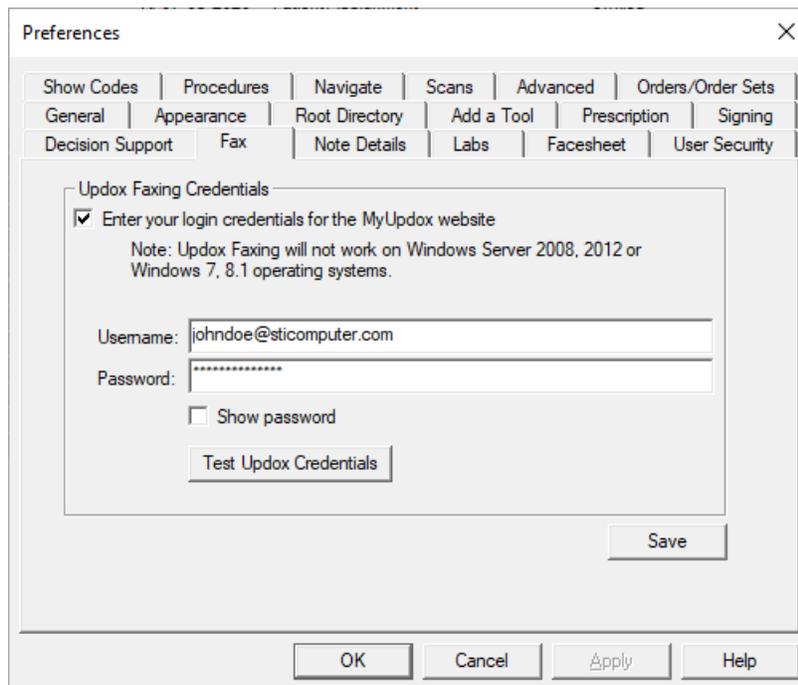


Figure 7 – Preferences – Fax – Updox Faxing Credentials

## Added Features (continued)

- **Preferences — Fax** — A new **Fax** tab has been added to the Preferences dialog that allows you to activate **Updox Faxing Credentials** where you can enter and test your login credentials for the MyUpdox website. See Figure 8. When the Updox Faxing Credentials option is checked, the faxing functionality throughout the system will use the Updox Faxing screens and options. Likewise, when the Updox Faxing Credentials option is unchecked, the Updox Faxing functionality will be disabled and other faxing solutions (i.e., Open Text Fax Appliance) will be activated.

When the Updox Faxing Credentials option is checked, the **Username** and **Password** fields will become active allowing you to enter your login credentials. You can then click the **Test Updox Credentials** button to verify the credentials entered. A Valid Login Credentials message or Invalid Login Credentials message will appear depending upon the validity of credentials entered. Once the options and credentials are entered as desired, be sure to click the **Save** button to activate those changes. Do note, that if the Updox Faxing Credentials option is checked and a Username and Password are not entered, when you click the Save button an error message will be generated and you will not be allowed to continued until they are entered.



The screenshot shows a 'Preferences' dialog box with a 'Fax' tab selected. The 'Updox Faxing Credentials' section is active, featuring a checked checkbox for 'Enter your login credentials for the MyUpdox website'. Below this is a note: 'Note: Updox Faxing will not work on Windows Server 2008, 2012 or Windows 7, 8.1 operating systems.' There are two input fields: 'Username:' containing 'johndoe@sticomputer.com' and 'Password:' containing a masked password. A 'Show password' checkbox is unchecked. A 'Test Updox Credentials' button is located below the password field. A 'Save' button is positioned at the bottom right of the main content area. At the very bottom of the dialog are 'OK', 'Cancel', 'Apply', and 'Help' buttons.

**Figure 8 – Preferences – Fax – Updox Faxing Credentials**

## Added Features (continued)

- **Template Editing – Screening** – The Screening Selection dialog (accessed via the **Screening** button), has been with a new screening: **Depression, Anxiety and Stress Scale (DASS21)**. See Figure 9. You can view the screening questionnaire by highlighting the applicable screening, and clicking the **Preview** button. To select the screening for use in the Screening button, highlight the screening in the Unused Screening section, and then click the **Use** button. You can then modify the order in which the screening will appear when accessing the Screening dialog in the chart note using the **Move Up** and **Move Down** buttons.

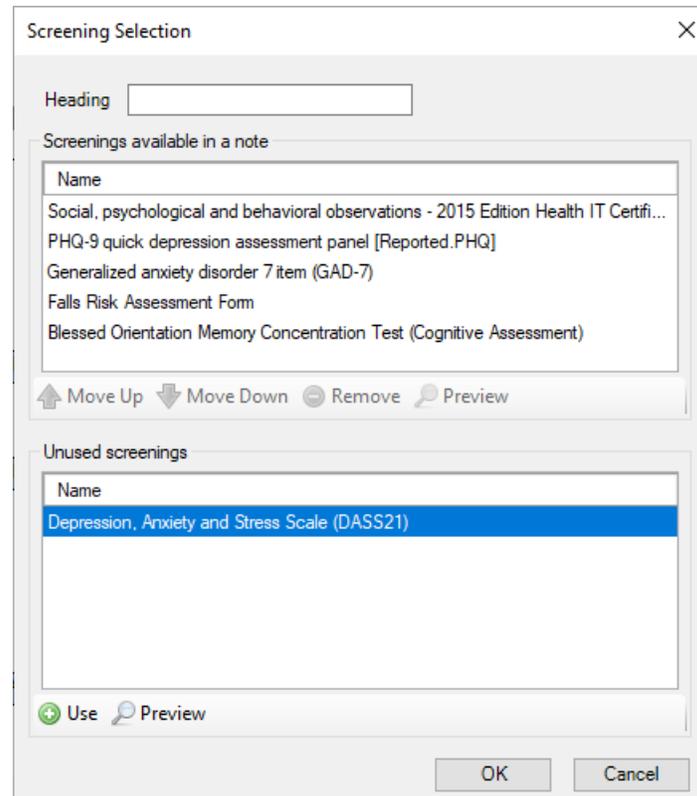


Figure 9 – Screening Selection

---

Some icons are from the Silk icon set by Mark James (<http://www.famfamfam.com/>). All rights reserved. Licensed under a Creative Commons Attribution 2.5 License (<http://creativecommons.org/licenses/by/2.5/>).

Some icons are from the Fugue icon set by Yusuke Kamiyamane (<http://p.yusukekamiyamane.com/>). All rights reserved. Licensed under a Creative Commons Attribution 3.0 License (<http://creativecommons.org/licenses/by/3.0/>).