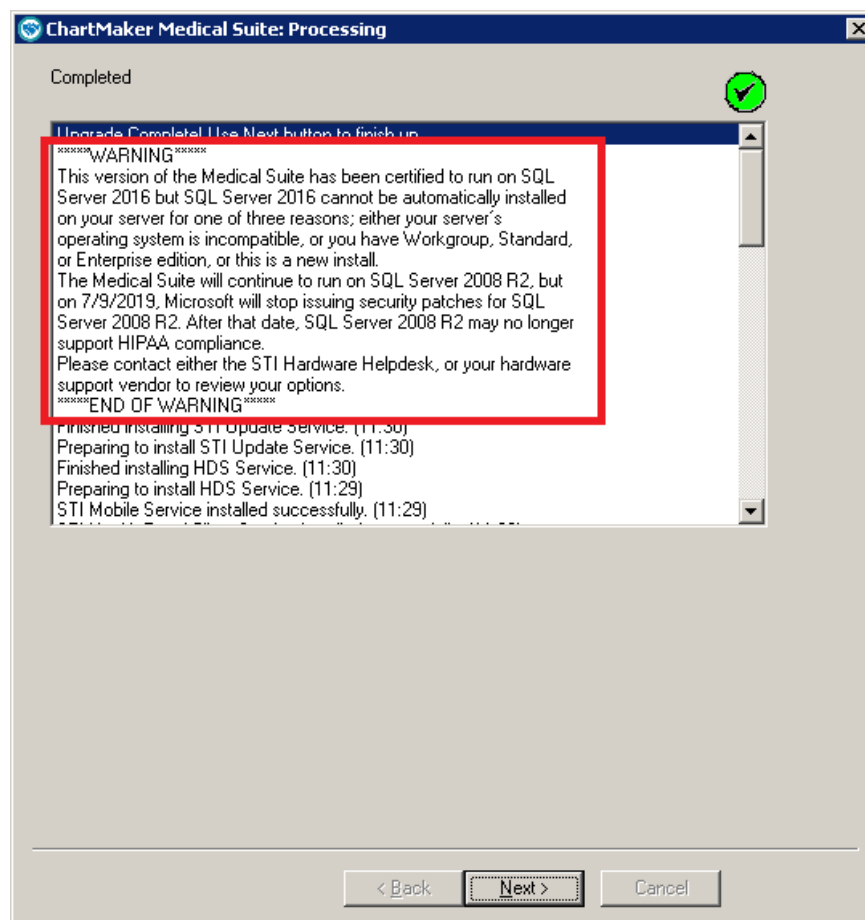


ChartMaker® Clinical Release Notes

ChartMaker® 2018.2 (fv6.5.4)

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

- **Audit Trail** – The Audit Trail has been updated to track whenever a PDF copy of a chart note is exported to the ChartMaker® PatientPortal. When an audit event occurs, the Event column will display **Export**; the Group column will display **Note**; the Audit Trail Description will display **Export to Patient Portal - PDF**; and the Metadata column will contain the patient's **Account ID**, the **Note Heading** (in the Comments), the **Note ID**, and **Visit Date**.
- **Audit Trail** – The Audit Trail has been updated to track whenever the **Export PDF copy of chart note to Patient Portal** preference has been modified in the **Signing** tab of the Preferences dialog. When an audit event occurs, the Event column will display **Modified**; the Group column will display **Configuration**; the Audit Trail Description will display **Patient Access PDF Note Export Setting modified**; the Old Value will display Enabled (checked) or Disabled (unchecked); the New Value will display Enabled (checked) or Disabled (unchecked) and the Metadata column will contain the **User ID** that made the change.
- **Audit Trail*** – The Audit Trail has been updated to track whenever the **Release to Patient** option in the Note Header has been modified. When an audit event occurs, the Event column will display **Modified**; the Group column will display **Note**; the Audit Trail Description will display **Release to patient: [Note Heading]**; the Old Value will display **ON** (if previously checked) or **OFF** (if previously unchecked); the New Value will display **ON** (if currently checked) or **OFF** (if currently unchecked); and the Metadata column will contain the **Account ID**, **Note ID**, **Visit Date**.

* This enhancement was released in the CMMS 6.5.4.542 hot fix release.

- **Export – Export Patient Data – Note PDF** – The system has been updated to export PDF copies of chart notes to the patient's ChartMaker® PatientPortal, in addition to the usual Note Summary and electronic results already being exported. This new enhancement provides an alternative solution that also supports the requirements against Information Blocking as outlined in the 21st Century Cures Act (21CCA). With this change, when a chart note is signed, that signed note in its entirety will be converted to PDF and then exported to the PatientPortal upon closing of the patient's chart, if that patient is enabled for Patient Access and is in an active state (not in a suspended state) for PatientPortal. However, PDF copies of chart notes will not be generated for auto-drug logs, auto In-House Orders, batch signing of documents, new messages/tasks, and PatientPortal messages. Also, when the PDF copy of the chart note is created it **will not** contain any information configured in a Confidentiality widget within the chart note. The confidential information configured in that widget will be excluded from the exported PDF copy of a chart note that is exported to the patient's PatientPortal.

An indicator in the bottom-right of the Note Header will appear for patient's that are activated for the PatientPortal, indicating whether the Note to PDF export functionality is on or off based on whether the **Export PDF copy of chart note to Patient Portal** signing preference is active or not (see the Preferences — Signing entry below). When the preference is active, a green PDF icon will be displayed followed by ON. See Figure 1. If the preference is deactivated, a grayed-out PDF icon will be displayed followed by OFF. Do note, the indicator will not be displayed for patient's whose PatientPortal has been suspended via the PatientPortal Practice Administration.

Likewise, when the Note to PDF is active, you can exclude chart notes from being exported, should a medical decision be made that it is in the patient's best interest to do so. A new **Release to Patient** option is available in the Note Header that defaults to selected (active) for new chart notes and when opening legacy notes. See Figure 1. If you unselect this option, then both the PDF copy of the note and the Note Summary will not be exported to the PatientPortal after the note is signed. Exclusions must comply with at least one of the [Eight Information Blocking Exceptions](#) outlined in the 21st Century Cures Act.

Do note, the Release to Patient option will be disabled and grayed out for patients that have the **Do not export on note, lab and scan signing** option checked in the Patient Access dialog, and for those patients whose PatientPortal has been suspended via the PatientPortal Practice Administration, and for users who only have **Read** (only) **Chart** privileges*.

The Release to Patient option can also be modified for signed chart notes*.

Added Features (continued)

Export – Export Patient Data – Note PDF (continued)

Also, when the Release to Patient option is unchecked, the **Send note to Patient Access** option that is accessed by right-clicking in the chart note will be disabled and grayed out*. If you then check the Release to Patient option in that note, the **Send note to Patient Access** option will then be activated allowing you to manually send a PDF copy of the chart note and a Note Summary for that chart note.

* These additional enhancements were released in the CMMS 6.5.4.542 hot fix release.

03-17-2021 GENERAL Progress Note Folder: Progress Notes

Provider: Ben Davidson, (5) Practice: Fictional Physicians (1) Case: Normal

Order Status Not Signed Facility:

☒ Release to patient ON

ADR

Date of Service: 03-17-2021
Patient: John Doe
DOB: 03/15/2002 Age: 19 years
Chart #: 10255

Figure 1 – Chart Note Header – Release to patient

- Export – Export Patient Data – Previous Summary** – The **Print Previous Summaries** dialog (accessed via the **Previous Summaries** button in the Export Patient Data dialog) has been updated to include any exports of PDF copies of chart notes that were previously sent to the patient's PatientPortal, allowing you to reprint these documents, as needed. These PDF copies of chart notes will be indicated by a Summary Type of **Note PDF** and a Destination of **PatientPortal**. See Figure 2. These documents can be reprinted in a similar manner as the other documents in this area.

Print Previous Summaries

Patient: Doe, John

Visit Date	Provider	Date Created	Summary Type	Destination
4/14/2021	Ben Davidson (5)	4/14/2021 9:47 AM	Note PDF	PatientPortal
4/14/2021	Ben Davidson (5)	4/14/2021 6:52 AM	Clinical Summary	PatientPortal
4/14/2021	Ben Davidson (5)	4/14/2021 8:36 AM	Note PDF	PatientPortal
4/14/2021	Ben Davidson (5)	4/14/2021 9:47 AM	Clinical Summary	PatientPortal
4/14/2021	Ben Davidson (5)	4/14/2021 8:57 AM	Clinical Summary	PatientPortal
4/9/2021	Ben Davidson (5)	4/13/2021 4:16 PM	Note PDF	PatientPortal
10/29/2018	Ben Davidson (5)	10/29/2018 6:10 ...	Clinical Summary	PatientPortal
10/29/2018	Ben Davidson (5)	10/29/2018 5:58 ...	Order	PatientPortal
10/29/2018	Ben Davidson (5)	10/29/2018 5:58 ...	Order	Local
10/23/2018	Ben Davidson (5)	10/23/2018 2:24 ...	Order	PatientPortal
10/23/2018		10/23/2018 2:06 ...	Scan	PatientPortal
10/23/2018	Ben Davidson (5)	10/23/2018 2:24 ...	Order	PatientPortal
10/23/2018	Ben Davidson (5)	10/23/2018 2:17 ...	Order	Local
10/23/2018	Ben Davidson (5)	10/23/2018 2:16 ...	Clinical Summary	PatientPortal
10/23/2018	Ben Davidson (5)	10/23/2018 2:09 ...	Clinical Summary	PatientPortal

Reprint Cancel

Figure 2 – Export Patient Data – Print Previous Summaries

Added Features (continued)

- **Export – Export Patient Data – Consultation Note** – The **Consultation Note** (accessed via the Note Selection field) has been updated to contain the following new sections in the export: **Advance Directives**, **Family History**, **Functional Status** (containing information in a checklist tagged as Functional Status), **General Status** (containing information in a checklist tagged as General Status), **Immunizations**, **Medical Equipment** (containing information in a checklist tagged as Medical Equipment), **Mental Status**, **Nutrition** (containing information in a checklist tagged as Nutrition), **Past Medical History** (containing information in a checklist tagged as Past Medical History), **Reason for Visit**, **Review of Systems** (containing information in a checklist tagged as Review of Systems), and **Social History**. Also, the **Encounters** section has been removed for the export.
- **Export – Export Patient Data – Discharge Summary** – The **Discharge Summary** (accessed via the Note Selection field) has been updated to contain the following new sections in the export: **Advance Directives**, **Assessment** (containing information in a checklist tagged as Assessment), **Family History**, **Functional Status** (containing information in a checklist tagged as Functional Status), **History of Present Illness** (containing information in a checklist tagged as History of Present Illness), **Immunizations**, **Nutrition** (containing information in a checklist tagged as Nutrition), **Past Medical History** (containing information in a checklist tagged as Past Medical History), **Procedures**, **Reason for Visit**, **Review of Systems** (containing information in a checklist tagged as Review of Systems), and **Social History**, and **Vitals**.
- **Export – Export Patient Data – History and Physical Note** – The **History and Physical Note** (accessed via the Note Selection field) has been updated to contain the following new sections in the export: **Assessment** (containing information in a checklist tagged as Assessment), **Chief Complaint** (containing information in a checklist tagged as Chief Complaint), **History of Present Illness** (containing information in a checklist tagged as History of Present Illness), **Immunizations**, **Plan of Treatment** (containing information in a checklist tagged as Plan of Treatment), **Procedures**, and **Reason for Visit**.
- **Export – Export Patient Data – Procedure Note** – The **Procedure Note** (accessed via the Note Selection field) has been updated to contain the following new sections in the export: **Assessment** (containing information in a checklist tagged as Assessment), **Anesthesia** (containing information in a checklist tagged as Anesthesia), **Chief Complaint** (containing information in a checklist tagged as Chief Complaint), **Family History**, **History of Present Illness** (containing information in a checklist tagged as History of Present Illness), **Medications Administered**, **Past Medical History** (containing information in a checklist tagged as Past Medical History), **Physical Exam** (containing information in a checklist tagged as Physical Exam), **Plan of Treatment** (containing information in a checklist tagged as Plan of Treatment), **Procedures**, **Procedure Findings** (containing information in a checklist tagged as Procedure Findings), **Reason for Visit**, **Review of Systems** (containing information in a checklist tagged as Review of Systems), and **Social History**.
- **Export – Export Patient Data – Progress Note** – The **Progress Note** (accessed via the Note Selection field) has been updated to contain the following new sections in the export: **Instructions**, **Interventions** (containing information in a checklist tagged as Interventions), **Nutrition** (containing information in a checklist tagged as Nutrition), **Objective** (containing information in a checklist tagged as Objective), **Physical Exam** (containing information in a checklist tagged as Physical Exam), **Review of Systems** (containing information in a checklist tagged as Review of Systems), and **Subjective** (containing information in a checklist tagged as Subjective).
- **Export – Export Patient Data – Referral Note** – The **Referral Note** (accessed via the Note Selection field) has been updated to contain the following new sections in the export: **Chief Complaint** (containing information in a checklist tagged as Chief Complaint), **Family History**, **General Status** (containing information in a checklist tagged as General Status), **History of Present Illness** (containing information in a checklist tagged as History of Present Illness), **Medical Equipment** (containing information in a checklist tagged as Medical Equipment), **Mental Status**, **Nutrition** (containing information in a checklist tagged as Nutrition), **Past Medical History** (containing information in a checklist tagged as Past Medical History), **Physical Exam** (containing information in a checklist tagged as Physical Exam), **Plan of Treatment** (containing information in a checklist tagged as Plan of Treatment), and **Review of Systems** (containing information in a checklist tagged as Review of Systems).
- **Medications – Medication Eligibility/Medication History*** – In previous versions, an issue could arise where the medication eligibility and medication history were not processing and being received for patients associated with certain providers. This issue has been corrected.

* This enhancement was released in the CMMS 6.5.4.515 hot fix release.

Added Features (continued)

- **Medications – Prescribe Medication – Formulary *** – In previous versions, an issue could arise where the Formulary section displayed an error stating, "Data unavailable at this time, please contact STI Customer Support if you continue to receive this error." This issue has been corrected.

* This enhancement was released in the CMMS 6.5.4.542 hot fix release.

- **The Note Tab – Note Header** – In previous versions, an issue could arise where all the practices would not appear in the Practice drop-down list, if two or more practices had similar or identical practice names. This issue has been corrected.
- **The Note Tab – Note Header – Release to Patient*** – The system has been updated so the Release to Patient option is enabled for electronic results (LABs). The functionality works in a similar manner as chart notes (see the **Export – Export Patient Data – Note PDF** above), with updates specific to the electronic labs since they can be automatically uploaded to the PatientPortal on import.

The Release to Patient option will be active and checked for an electronic lab note regardless of whether the lab was uploaded to the PatientPortal on import.

When the electronic lab is signed, if the Release to Patient option is checked, and the electronic lab had been uploaded to the PatientPortal on import, then it will only be exported to the PatientPortal if there was an annotation to the lab. If the electronic lab had NOT been uploaded on import, and the Release to Patient option is checked, then the lab will be exported to the PatientPortal upon signing.

If the Release to Patient option is unchecked, if the electronic lab had been uploaded to the PatientPortal on import, then any annotations to the lab will NOT be exported upon signing. Likewise, if the electronic lab had NOT been uploaded on import, and the Release to Patient option is unchecked, then the lab will NOT be exported to the PatientPortal upon signing.

Like chart notes, the Release to Patient option will be disabled and grayed out for patients that have the **Do not export on note, lab and scan signing** option checked in the Patient Access dialog, and for those patients whose PatientPortal has been suspended via the PatientPortal Practice Administration, and for users who only have **Read** (only) **Chart** privileges.

Likewise, when the Release to Patient option is unchecked, the **Send note to Patient Access** option that is accessed by right-clicking in the chart note will be disabled and grayed out. If you then check the Release to Patient option in that note, the **Send note to Patient Access** option will then be activated allowing you to manually export that electronic lab to the patient's PatientPortal.

* This enhancement was released in the CMMS 6.5.4.542 hot fix release.

- **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, NDC codes, and VIS documents, per the latest CDC guidelines, are used for immunization procedures.

* This feature was released in the CMMS 6.5.4.515 hot fix release.

Added Features (continued)

- **Preferences — Signing** – The **Signing** tab has been redesigned with a new **General** section and a new **Patient Access** section to better organize the signing preferences and their respective functionality. Likewise, a new **Export PDF copy of chart note to Patient Portal** preference has been added to the Patient Access section, that allows you to enable and disable the export of a PDF copy of chart notes to the patient's PatientPortal upon signing the note. This option defaults to enabled (checked). See Figure 3. Whenever this new option is modified, it will be tracked in the Audit Trail.

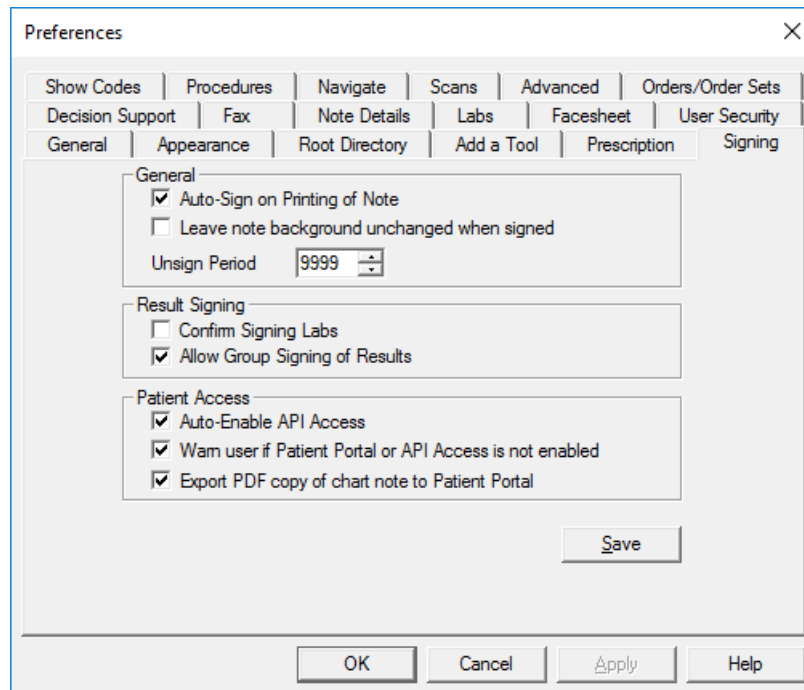


Figure 3 – Preferences – Signing

- **Scans – Scan Manager*** – The system has been updated so that **Release to patient** option in the Scan Manager dialog will only be displayed for those patients for are registered for the PatientPortal. If the patient is not registered for the PatientPortal, this option will not appear.

* This enhancement was released in the CMMS 6.5.4.542 hot fix release.

- **Template Editing – Checklist** – The **Include as** drop-down list in the **Finding Check List Properties** dialog has been updated to include an **Anesthesia** option. See Figure 4. 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 Anesthesia section.
- **Template Editing – Checklist** – The **Include as** drop-down list in the **Finding Check List Properties** dialog has been updated to include an **Interventions** option. See Figure 4. 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 Interventions section.
- **Template Editing – Checklist** – The **Include as** drop-down list in the **Finding Check List Properties** dialog has been updated to include a **Medical Equipment** option. See Figure 4. When this option is selected for a checklist, any data entered in the checklist will be pulled into any CCDA document type that has a Medical Equipment section.
- **Template Editing – Checklist** – The **Include as** drop-down list in the **Finding Check List Properties** dialog has been updated to include a **Nutrition** option. See Figure 4. When this option is selected for a checklist, any data entered in the checklist will be pulled into any CCDA document type that has a Nutrition section.
- **Template Editing – Checklist** – The **Include as** drop-down list in the **Finding Check List Properties** dialog has been updated to include an **Objective** option. See Figure 4. When this option is selected for a checklist, any data entered in the checklist will be pulled into any CCDA document type that has a Objective section.

Added Features (continued)

- **Template Editing – Checklist** – The **Include as** drop-down list in the **Finding Check List Properties** dialog has been updated to include a **Procedure Findings** option. See Figure 4. When this option is selected for a checklist, any data entered in the checklist will be pulled into any CCDA document type that has a Procedure Findings section.
- **Template Editing – Checklist** – The **Include as** drop-down list in the **Finding Check List Properties** dialog has been updated to include a **Subjective** option. See Figure 4. When this option is selected for a checklist, any data entered in the checklist will be pulled into any CCDA document type that has a Subjective section.

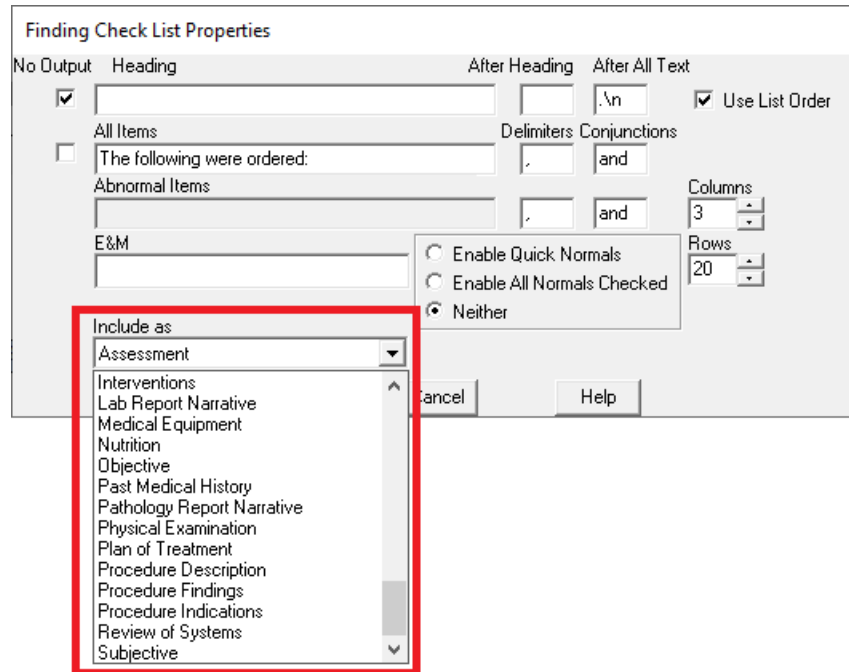


Figure 4 – Finding Check List Properties

- **To-Do List** – In previous versions, an issue could arise when loading the To-Do List that resulted in a transaction deadlock error. This issue has been corrected. [Bug 28080]

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