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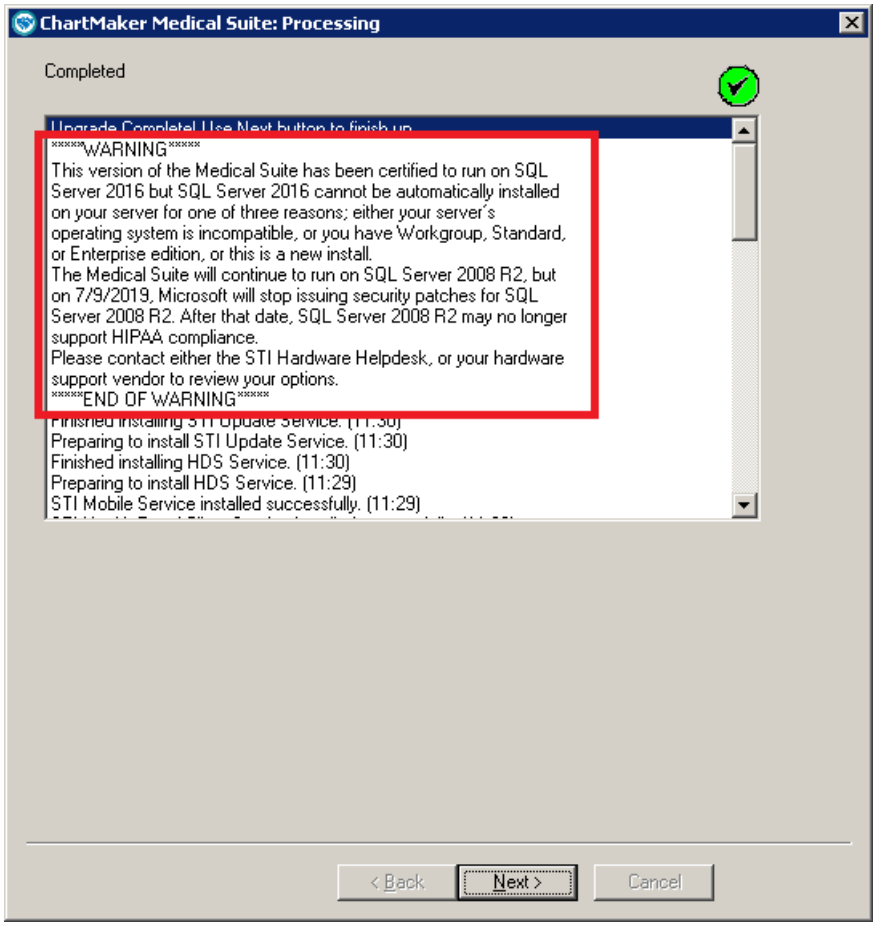
ChartMaker® Clinical Release Notes

ChartMaker® 2018.2 (fv6.6.3)

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

- **Audit Trail –** The Audit Trail has been updated to track whenever an Electronic Case Report is generated for a patient. When an audit event occurs, the Event column will display **Export**; the Group column will display **CCDA**; and the Audit Trail Description will display **Electronic Case Report [Date Range]**; and the Metadata column will contain the **Account ID**, **Output File**, **Trigger Codes**, **Provider ID**, and **Practice ID**.

- **Electronic Case Reporting –** The system has been updated with a new Electronic Case Reporting dialog (accessed outside of a patient's chart, via **Chart** > **Export** > **Electronic Case Report**) that allows you to generate an electronic Initial Case Report (eIRC) for applicable patients for a selected date range. See Figure 1. The Electronic Case Reporting dialog can be accessed by users with Patient Data Export privilege of **Export** or higher.

  In the Electronic Case Report dialog, you can configure a **From** and **To** date, select an active **Practice**, and in the **Provider** field, select all provides or a specific provider, as well as browse to the location of the **Output File**. Clicking the **Export** button will cause the system to query the database for any trigger codes encountered, based on Electronic Reporting and Surveillance Distribution (eRSD) specifications, and will then create the reports for any applicable patients which will be zipped into a single file. If no trigger codes were encountered for the date range, a popup message will appear indicating that no trigger codes were found, and no file will be generated. Whenever a file is generated an entry for each patient for whom a report was generated will be tracked in the Audit Trail.

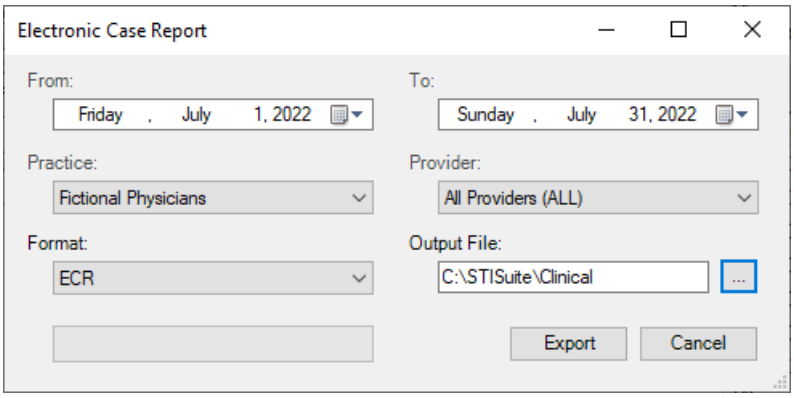


Figure 1 – Electronic Case Report

- **Export – Export Patient Data – Consultation Note –** The **Consultation Note** (accessed via the Note Selection field in the Export Patient Data dialog or when tagging a chart note via the Document Type button in the Note Header) has been updated to include all **Family History** data that is in a patient's chart regardless of which note the family history was originally entered or displayed.

- **Export – Export Patient Data – Discharge Summary –** The **Discharge Summary** (accessed via the Note Selection field in the Export Patient Data dialog or when tagging a chart note via the Document Type button in the Note Header) has been updated to include all **Family History** data that is in a patient's chart regardless of which note the family history was originally entered or displayed.

- **Export – Export Patient Data – History and Physical Note –** The **History and Physical Note** (accessed via the Note Selection field in the Export Patient Data dialog or when tagging a chart note via the Document Type button in the Note Header has been updated to include all **Family History** data that is in a patient's chart regardless of which note the family history was originally entered or displayed.

- **Export – Export Patient Data – Procedure Note –** The **Procedure Note** (accessed via the Note Selection field in the Export Patient Data dialog or when tagging a chart note via the Document Type button in the Note Header) has been updated to include all **Family History** data that is in a patient's chart regardless of which note the family history was originally entered or displayed.

Added Features (continued)

- **Export – Export Patient Data – Referral Summary/Referral Note –** The **Referral Summary** (accessed via the Note Selection field in the Export Patient Data dialog) and the **Referral Note** (accessed when tagging a chart note via the Document Type button in the Note Header) have been updated to include all **Family History** data that is in a patient's chart regardless of which note the family history was originally entered or displayed.

- **Export – Export Patient Data – Note Selection –** The Note Selection drop-down list has been updated so that the Clinical Summary option has been changed to Note Summary to provide clarity and consistency throughout the system, as well as to better delineate the type of information exported when this document type is selected. See Figure 2.

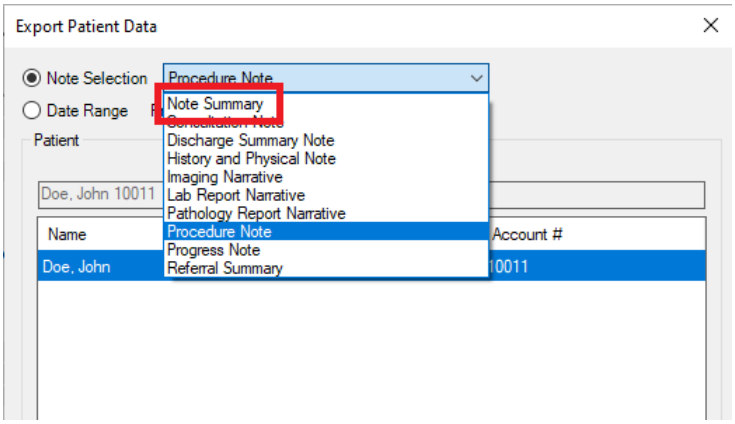


Figure 2 – Export Patient Data – Note Selection

- **Immunization Registry – NJIIS –** In previous versions, an issue could arise that result in errors and connection issues with NJIIS due to invalid characters in the Lot Number when using the barcode scanner when entering an immunization. This issue has been corrected.

- **Medications – Prescribe Medication* –** The **Dispense** drop-down list in the Prescribe Medication dialog has been updated to remove all the Quantity Units of Measure that are obsolete. See Figure 3. Starting on September 1, 2022, any e-prescriptions that are using these obsolete units of measure will be rejected by SureScripts, and the e-prescription will not be completed.

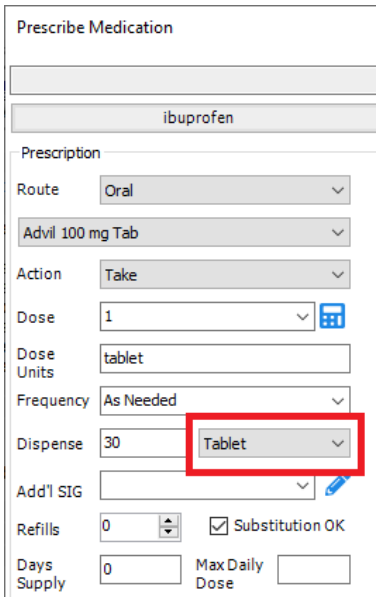


Figure 3 – Prescribe Medication – Dispense

Added Features

- **The Note Tab – Note Header –** The Unknown document type has been updated to **Unknown (Note Summary)** to better clarify and delineate the type of information exported when this document type is selected. To this end, whenever the Unknown (Note Summary) type is selected for a note template, the Note Header will display **Unknown (Note Summary)** in the label and/or the tooltip that appears when hovering over the label. See Figure 4.

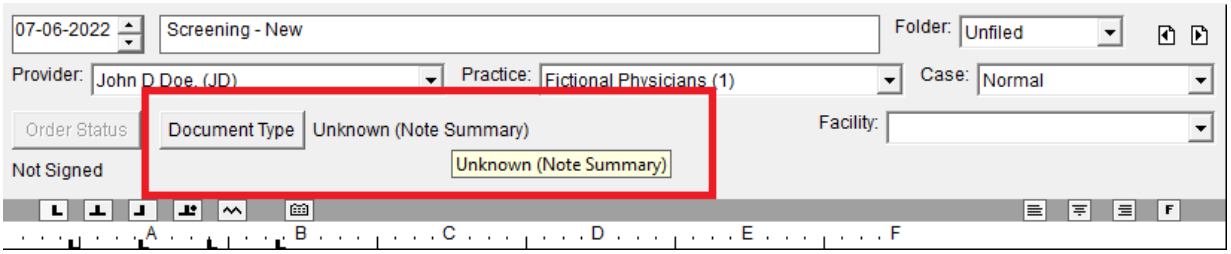


Figure 4 – Note Header – Document Type

Likewise, the Document Type dialog has been updated to display **Unknown (Note Summary)** for the previously labeled Unknown document type. See Figure 5.

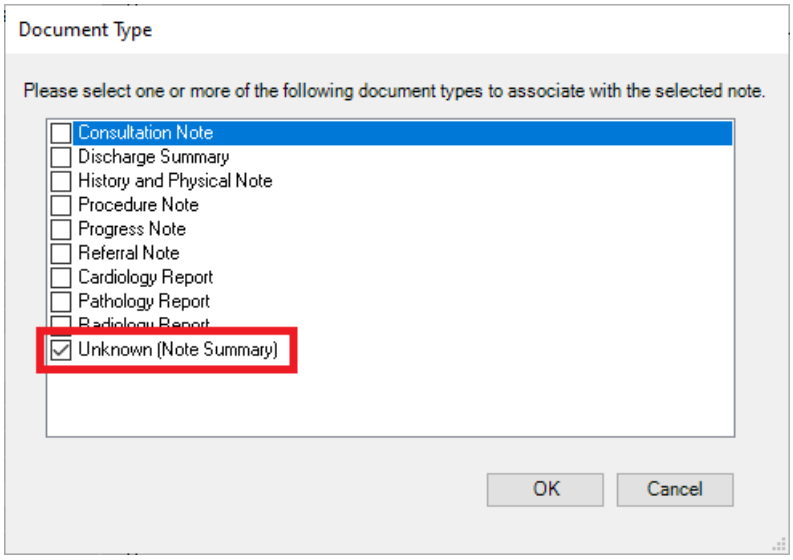


Figure 5 – Document Type

- **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.

* This feature was released in the CMMS 6.6.3.431 hot fix release.

Added Features (continued)

- **The Note Tab – Send PDF to the Patient Portal –** The system has been updated to allow to export a PDF copy of a chart note to the patient's PatientPortal, even when the **Export PDF copy of chart note to Patient Portal** preference is off. The right-click menu in a chart note has been updated with a **Send PDF to Patient Portal** option that allows you to send a PDF copy of that note to the patient's PatientPortal. See Figure 6. This new option will be accessible for patient's that are registered for the PatientPortal, the **Release to patient** option is checked in the chart header, and the user has Chart Write privileges.

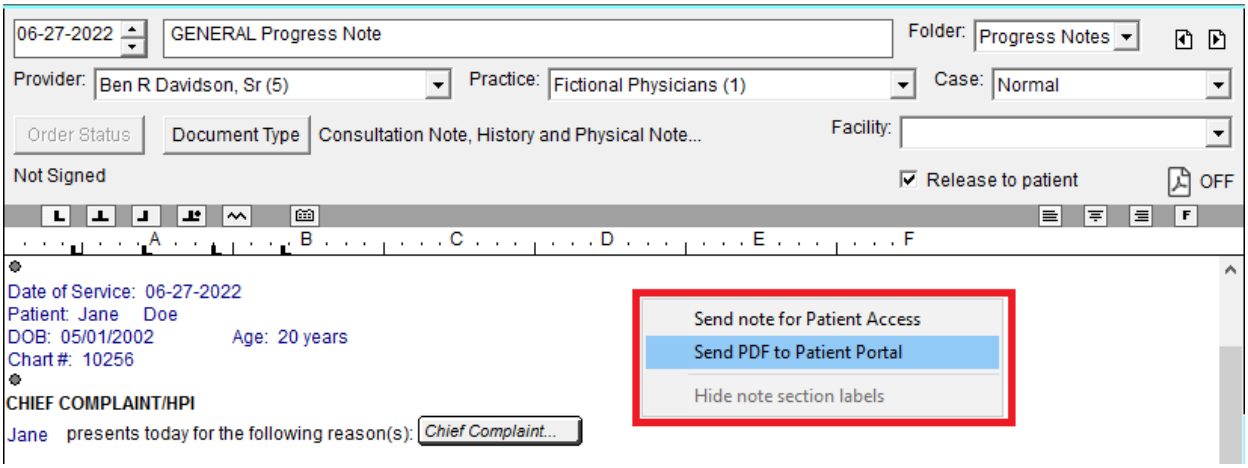


Figure 6 – Chart Note – Send PDF to Patient Portal

Added Features (continued)

- **Organizer – Document Type–** The Document Type column of the Organizer has been updated to display any chart notes that were previously configured with an Unknown document type, as **Unknown (Note Summary)**. Likewise, any chart note (CPN) that did not have a document type configured for it, will default to Progress Note, and will display **Progress (default)** in the Document Type column. See Figure 7.

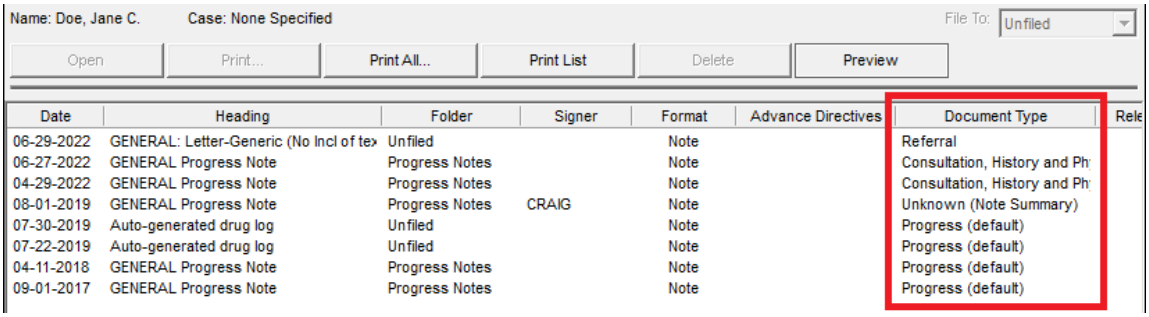


Figure 7 – The Organizer

Likewise, the Document Type dialog has been updated to display **Unknown (Note Summary)** for the previously labeled Unknown document type. See Figure 8.

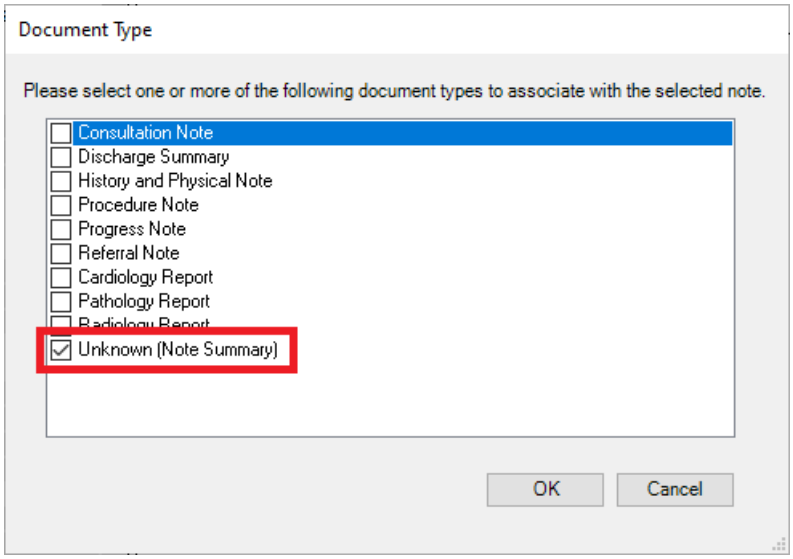


Figure 8 – Document Type

Added Features (continued)

- **Template Editing – Template Editor** – The Template Editor has been updated with a **Release to patient (RTP)** option that allows you to determine whether that template, when used to create a new note or letter, will default to automatically export, or to not export, that chart note or letter to the ChartMaker® PatientPortal. See Figure 9.

  When the **Release to patient (RTP)** option is checked for the template, whenever a new chart note (Note tab > New Note) or a new letter (Note tab > New Letters) is created for patient using that template, the **Release to Patient** option in the chart header of the note or letter will default as checked. When the **Release to patient (RTP)** option is unchecked for the template, whenever new chart notes or letters are created for patient using that template, the **Release to Patient** option in the chart header of the note or letter will default as unchecked. Do note, that these default options can be overridden for a chart note or chart letter by checking or unchecking the **Release to Patient** option in the chart header for the note or letter.

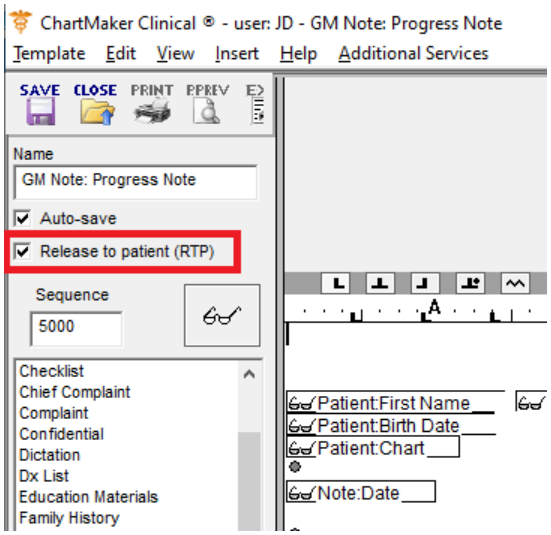


Figure 9 – Template Editor

Additionally, the Template List has been updated with a RTP column that will display whether the template is configured to default the Release to patient (RTP) as checked, or unchecked. See Figure 10. Whenever the **Release to patient (RTP)** option is inactive and unchecked for a template, a **No** will appear in the RTP column. Whenever the **Release to patient (RTP)** option is active and checked for a template, the RTP column will be empty, and nothing will display in the column. Likewise, the Search Column drop-down list now contains a RTP option, allowing you to search for templates that have the RTP option as inactive (No in search field).

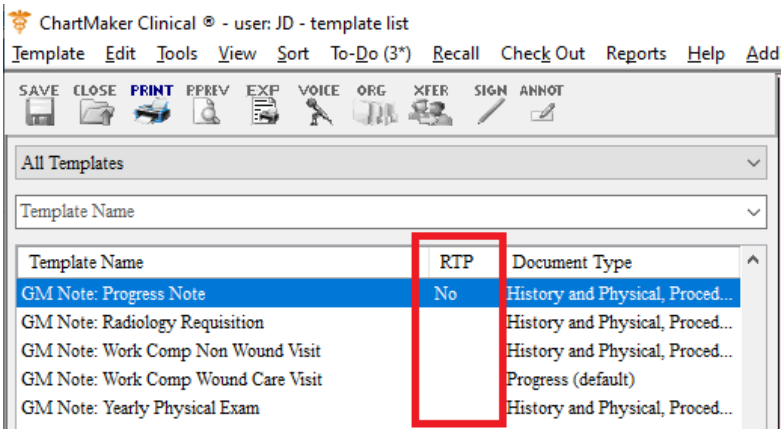


Figure 10 – Document Type

Added Features (continued)

- **Template Editing – Template List** – The Unknown document type has been updated to **Unknown (Note Summary)** to better clarify and delineate the type of information exported when this document type is selected. Therefore, whenever the Unknown (Note Summary) type is selected for a template, the Document Type column in the Template List will display **Unknown (Note Summary)**. Also, any template that does not have a document type configured for it, will be defaulted to Progress Note, and will display **Progress (default)** in the Document Type column. See Figure 11.

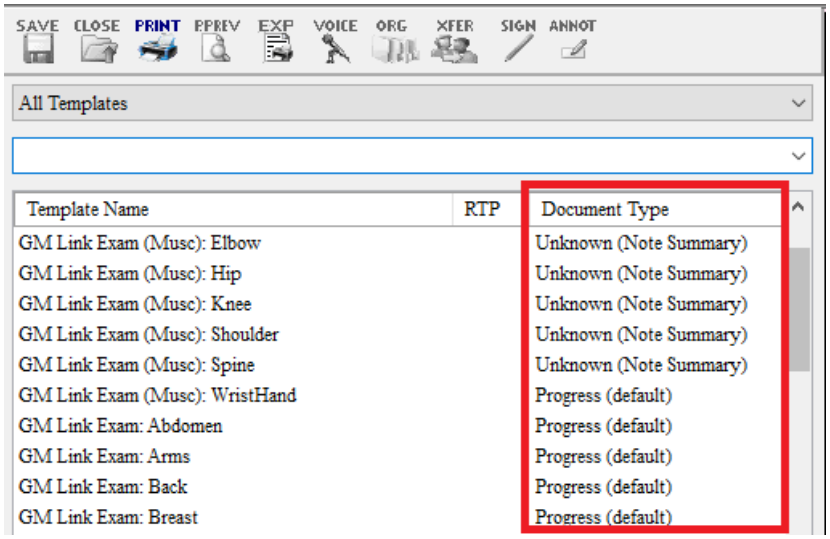


Figure 11 – Template List

Likewise, the Document Type dialog has been updated to display **Unknown (Note Summary)** for the previously labeled Unknown document type. See Figure 12.

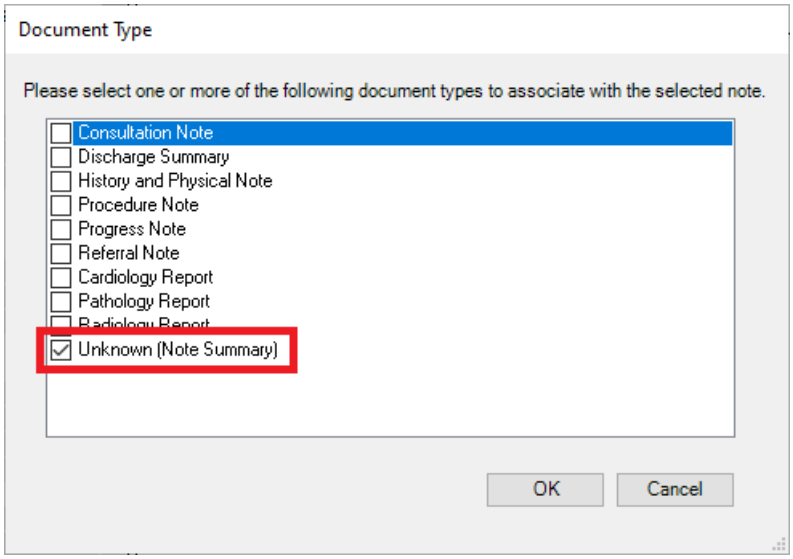


Figure 12 – Document Type

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