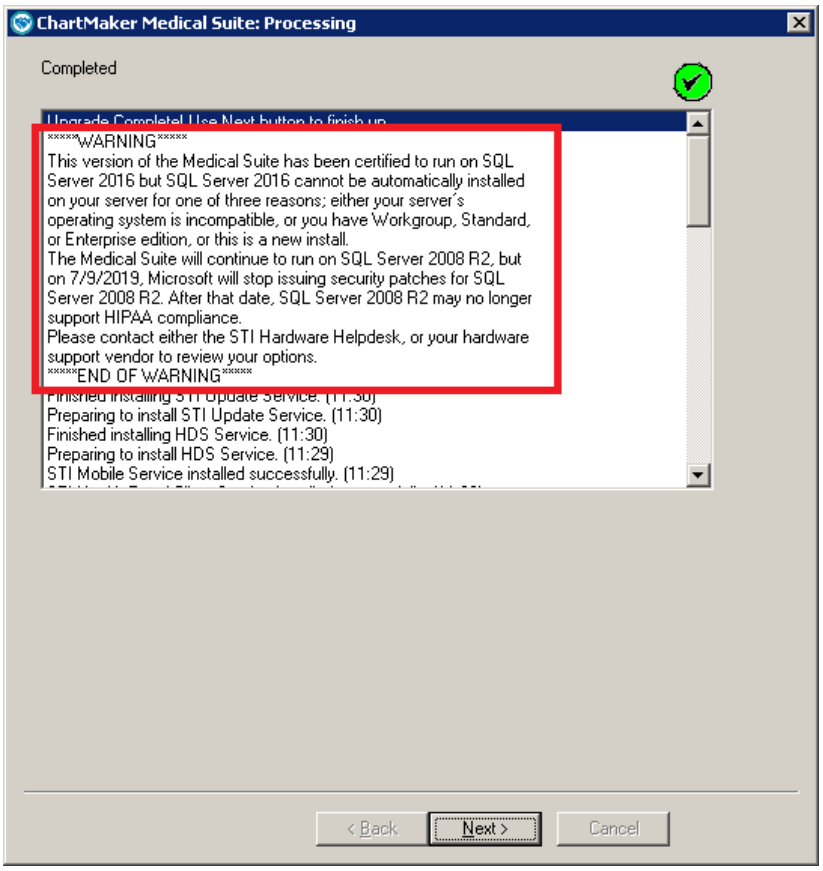
ChartMaker® Clinical Release Notes

ChartMaker® 2022.1 (fv6.7.0)

Important Notifications

- **Upgrade from Microsoft Server 2008/2012 and Windows 7/8 –** Since January 2020, your **Windows 7/8** workstations and **Microsoft 2008 Servers** are no longer supported. Likewise, support for **Windows 8.1** will end on January 10, 2023, and support for **Windows Server 2012/2012R2** will end on October 10, 2023. 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 change is made to the **To-Do List Access Restrictions** privilege for a user. When an audit event occurs, the Event column will display **Modified**; the Group column will display **User**; the Audit Trail Description will display **Privilege changed: To-Do List Access Restrictions**; the Old Value and New Value columns will display None or All as applicable; and the Metadata column will contain the **Login ID** and **User Name**.

- **ChartMaker® API –** The system has been updated with a totally redesigned ChartMaker® API that allows the sharing of patient clinical data with third-party applications per the requirements outlined in the 21st Century Cures Act. To support this new feature, a new STI Data Transfer Service and STITransferData database will be installed upon upgrade. Likewise, new registration and administration areas have been created allowing you to maintain access for patients, providers, and third-party applications. Once the registration process is completed, the system will begin process of exporting applicable clinical data for the patients to be shared with the authorized third-party apps. Registration information for the API, as well as the patient data exported, will be tracked in the Audit Trail. Further details regarding this feature are outlined below.

- **ChartMaker® API – Patient Administration –** A new **Patient ChartMaker API Administration** dialog (accessed via **Chart** > **ChartMaker API** > **Patient Administration**) has been created allowing you to register patients for the ChartMaker® API. See Figure 1. In the Patient Registration tab, you can create a **New** registration, **Resend** an enrollment notification for a patient, **Cancel** the registration for a patient, and **Refresh** the list of pending registrations.

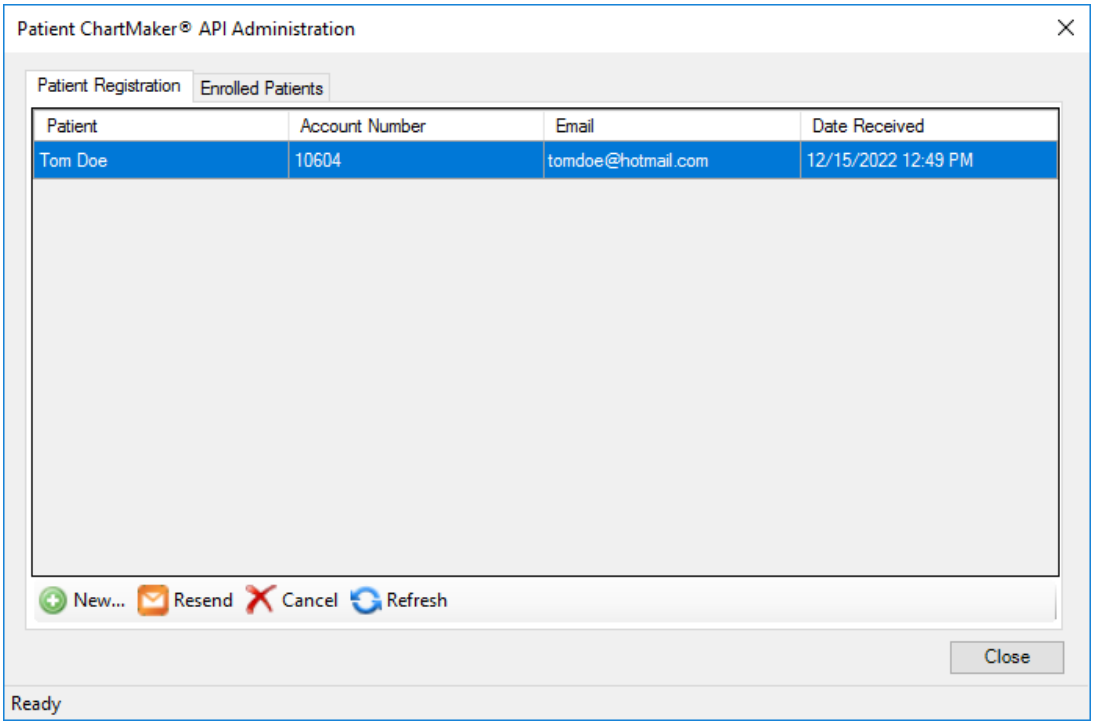


Figure 1 – Patient ChartMaker® API Administration – Patient Registration

To register a patient for the ChartMaker® API, in the Patient Registration tab, click the **New** button and a **Register Patient** dialog will appear, allowing you to search the specific patient. See Figure 2. Once the patient is located and highlighted, their **Status** and **Email Address** will populate on the right-hand side. If they have a status of Not Registered, the **Register** button will be accessible; click this button to register the patient. An email message will then be sent to the patient with directions and information about completing the registration and creating an account for the API. Once their account is created, they will be able to view the approved third-party apps that they want to share their clinical data with, determine what clinical information those third-party apps can access, as well as the ability to revoke an apps access.

Added Features (continued)

ChartMaker® API – Patient Administration (continued)

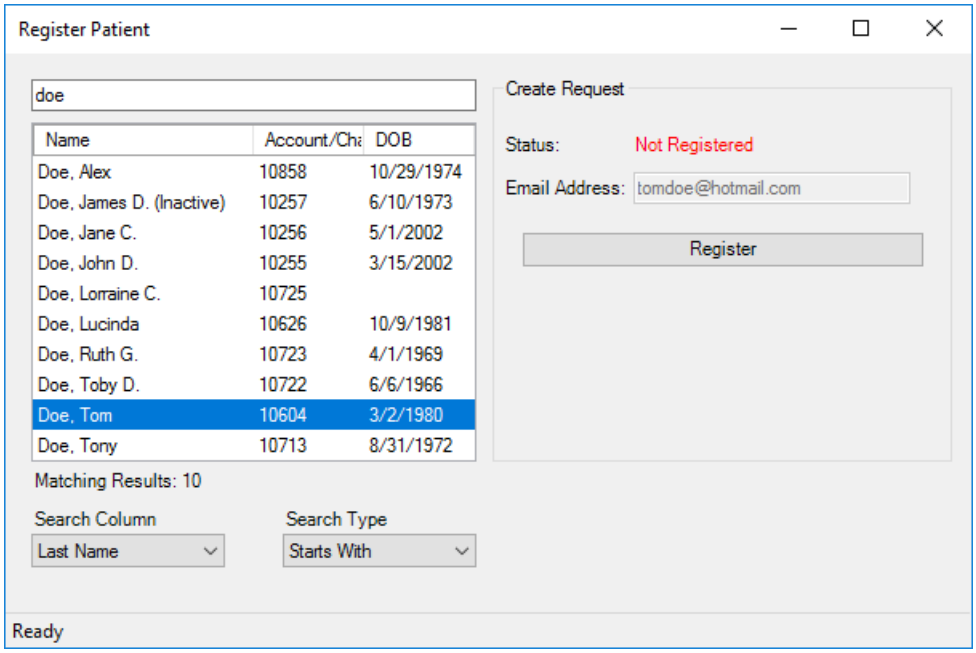


Figure 2 – Register Patient

After a patient has completed their registration and are enrolled, they will be transferred to the Enrolled Patients tab. In the Enrolled Patients tab, you can view a patient's **Upload Status**, their **Upload Start Date**, and **Upload Completed Date**. See Figure 3. Likewise, you can also **Deactivate** a patient, and **Refresh** the list of enrolled patients.

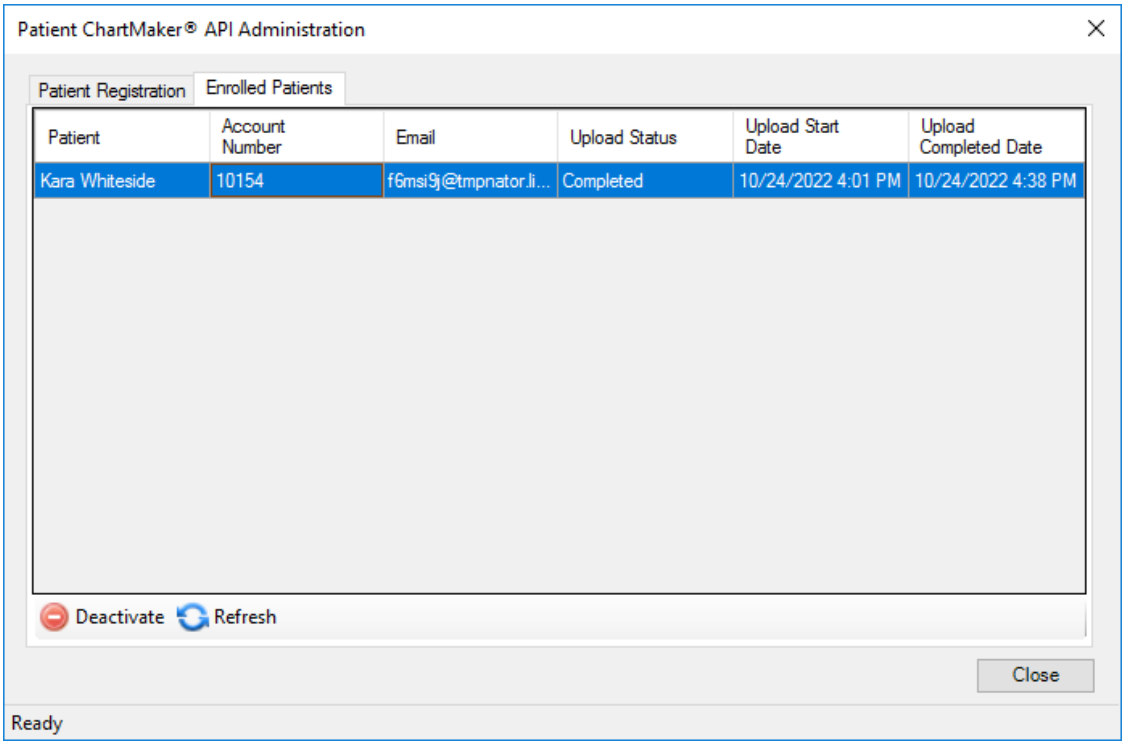


Figure 3 – Patient ChartMaker® API Administration – Enrolled Patients

Added Features (continued)

- **ChartMaker® API – Provider Administration –** A new **Provider ChartMaker API Administration** dialog (accessed via **Chart** > **ChartMaker API** > **Provider Administration**) has been created allowing you to register providers for the ChartMaker® API. See Figure 4. In the Provider Registration tab, you can create a **New** registration, **Resend** an enrollment notification for a provider, **Cancel** the registration for a provider, and **Refresh** the list of pending registrations.

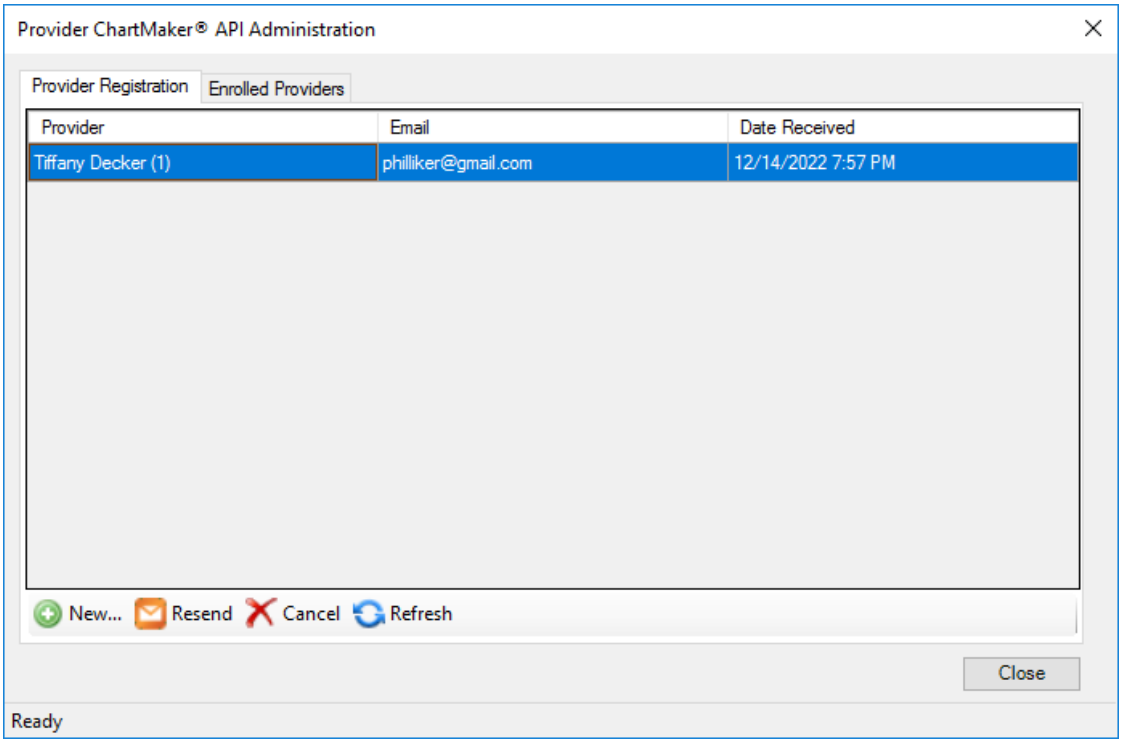


Figure 4 – Provider ChartMaker® API Administration – Provider Registration

To register a provider for the ChartMaker® API, in the Provider Registration tab, click the **New** button and a **New Provider Registration** dialog will appear, allowing you to Select a User. See Figure 5. Once the provider is located and highlighted, they will appear in the User Selected field. You can then enter their **Email Address**, and then click the **Send** button. An email message will then be sent to the email address with directions and information about completing the registration. The provider will then be able to create an account for the API, and once their account is created, they will be able to view the approved third-party apps that they want to share their clinical data with, determine what clinical information those third-party apps can access, as well as the ability to revoke an apps access.

Added Features (continued)

ChartMaker® API – Provider Administration (continued)

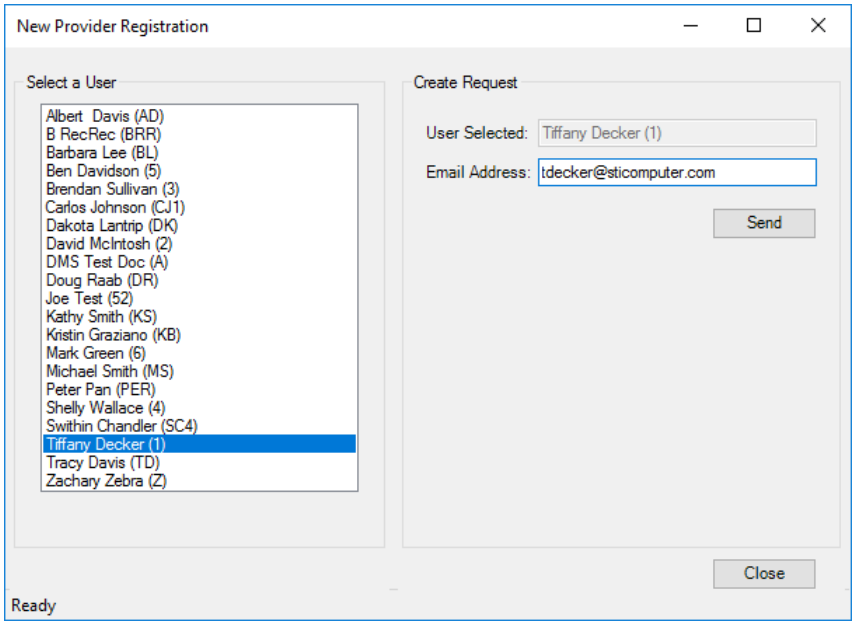


Figure 5 – New Provider Registration

After a provider has completed their registration and are enrolled, they will be transferred to the Enrolled Providers tab. In the Enrolled Patients tab, you can view a provider's **Upload Status**, their **Upload Start Date**, and **Upload Completed Date**. See Figure 6. Likewise, you can also **Deactivate** a provider, **Refresh** the list of enrolled providers, and **Upload Initial Data** for the provider.

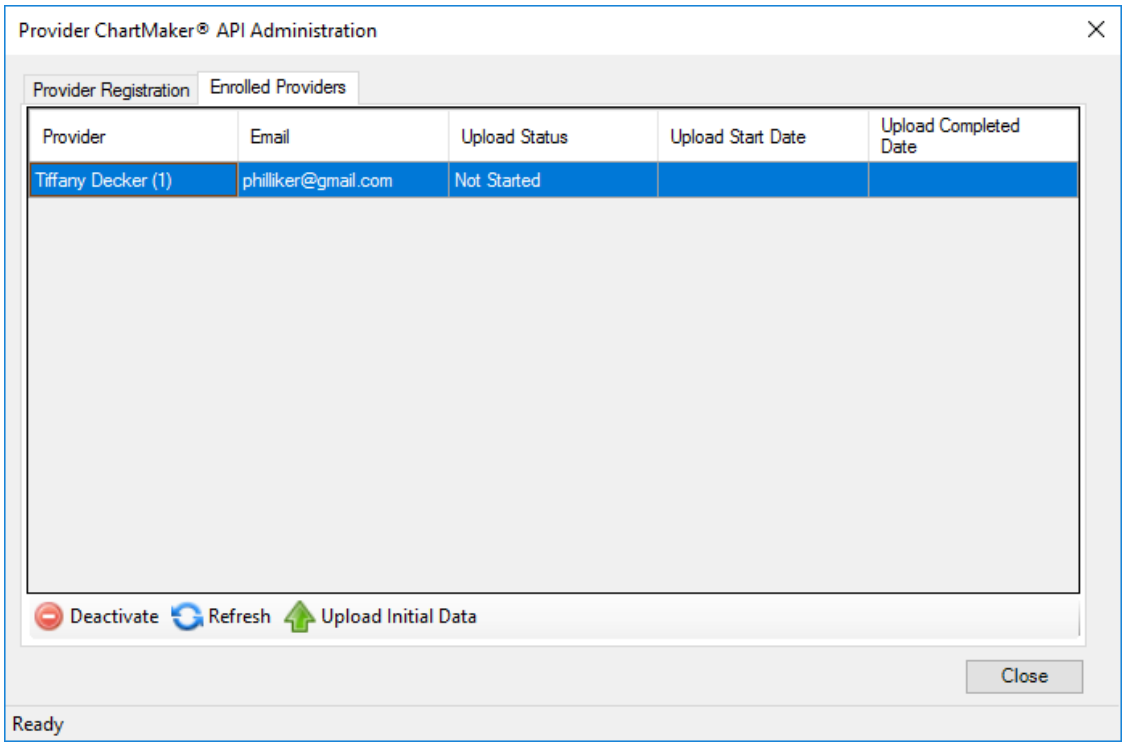


Figure 6 – Provider ChartMaker® API Administration – Enrolled Providers

Added Features (continued)

- **ChartMaker® API – Third-Party Administration –** A new **Third-Party ChartMaker API Administration** dialog (accessed via **Chart** > **ChartMaker API** > **Third-Party Administration**) has been created allowing you to administer third-party companies for the ChartMaker® API. See Figure 7. The Authorized Third-Parties tab will display the approved third-party applications, along with their **Date Authorized**, **Upload Status**, their **Upload Start Date**, and **Upload Completed Date**. You can **Reactivate** and **Deactivate** third-party apps, **Refresh** the list of authorized apps, and **Upload Initial Data** for a third-party app.

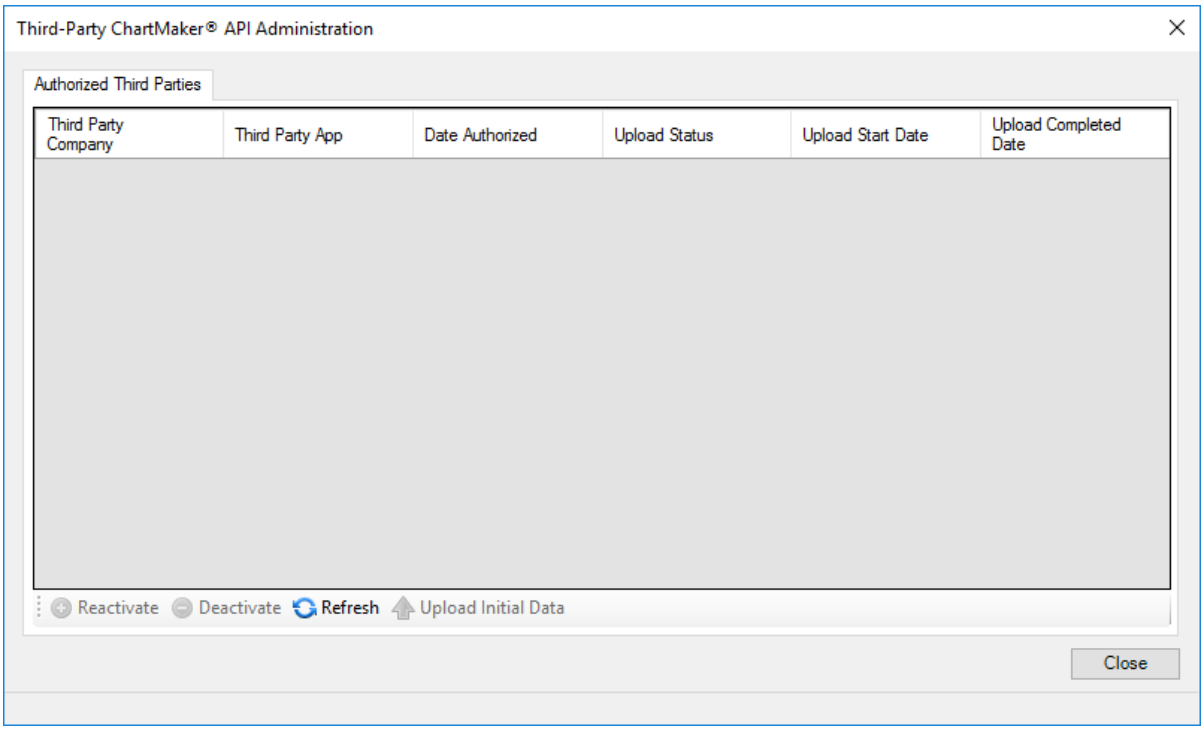


Figure 7 – Third-Party ChartMaker® API Administration – Authorized Third Parties

Added Features (continued)

- **ChartMaker® API – Connect to External Application –** A new **Connect to External Application** dialog (accessed via **Chart** > **ChartMaker API** > **Connect to External Application**) has been created allowing you to search for and select a patient, then enter an **External Application Connection URL**, and then click the **Launch Application** button to view their patient data via the external applications site. See Figure 8.

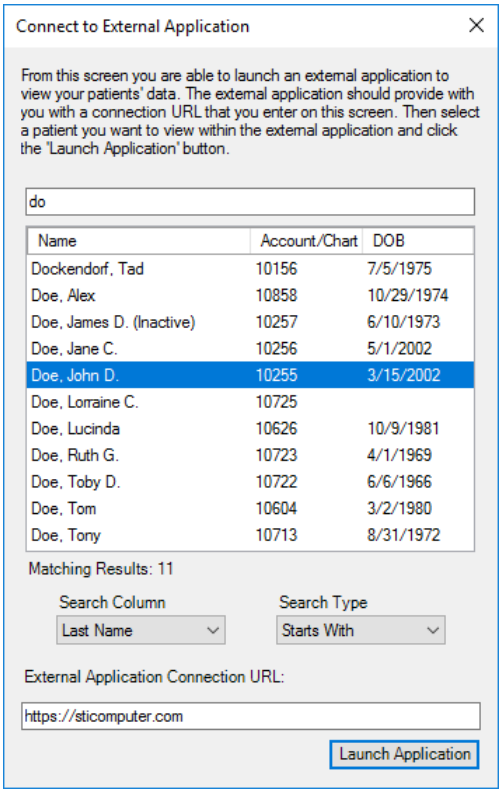


Figure 8 – Third-Party ChartMaker® API Administration – Authorized Third Parties

- **Export – Export Patient Data –** In previous versions, an issue could arise due to invalid XML characters populating the Lot Number for an immunization, causing Continuity of Care Documents (CCD) to fail to export. This issue has been corrected.

- **HIE Export – HealtheConnections –** In previous versions, an issue could arise where exports were not being processed due to an "Object reference not set to an instance of an object" error. This issue has been resolved.

- **Import – From HIE –** The **Import Document from HIE** dialog has been updated so that whenever a CDA retrieval from an HIE has time-out or errored, a pop-up message will appear indicating the error. See Figure 9.

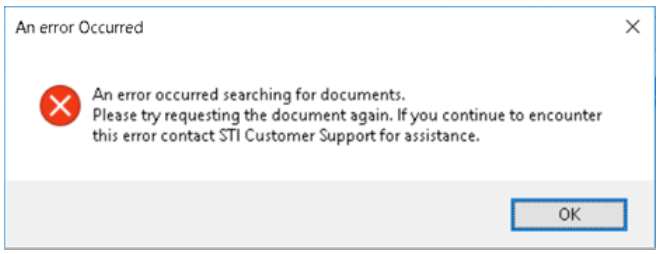


Figure 9 – Import Document from HIE – An Error Occurred

Added Features (continued)

- **Medications – Rx Change –** The system has been updated so that when a Change Request has been processed for a controlled substance medication, when attempting to print that medication afterwards, via the facesheet, it will display a **Queue for Printing as Copy** option in the menu, and the printed copy of the script will contain a "Copy Only, Not Valid for Dispensing" message on the printed/previewed script.

- **MIPS Dashboard – Configuration –** The system has been updated so that whenever certain changes are made in the MIPS Dashboard Configuration dialog, the previous Quality measure calculation will not clear and reset, allowing you to make certain changes in the dialog without losing previous selections and results for the Quality measure.

  Whenever changes are made to the Promoting Interoperability Measure Selection, Promoting Interoperability Exemption, Promoting Interoperability Exclusions, Quality Reporting (changing radio button options only), Improvement Activity, Cost Case Minimums, PCF Identifier, Configuration Name, Performance period, Eligible clinicians, Practice, and/or Facility areas, the Quality measure selections and results will be kept as previously selected and calculated. See Figure 10.

  Whenever a change is made to the **Number of measures reported through STI Quality reporting registry** field in the Quality Reporting section, the system will clear the selected Quality measure and results, and they will need to be reselected and recalculated.

  Likewise, whenever changes are made to the Promoting Interoperability Measure Selection, Promoting Interoperability Exemption, Promoting Interoperability Exclusions, Reporting period, Eligible clinicians, Practice, and/or Facility areas, as well as the **Number of measures reported through STI Quality reporting registry** value within the Quality Reporting section, whenever those changes are saved, a pop-up message will appear stating, "Due to certain configuration changes you will have to recalculate your current MIPS results to get the most accurate results."

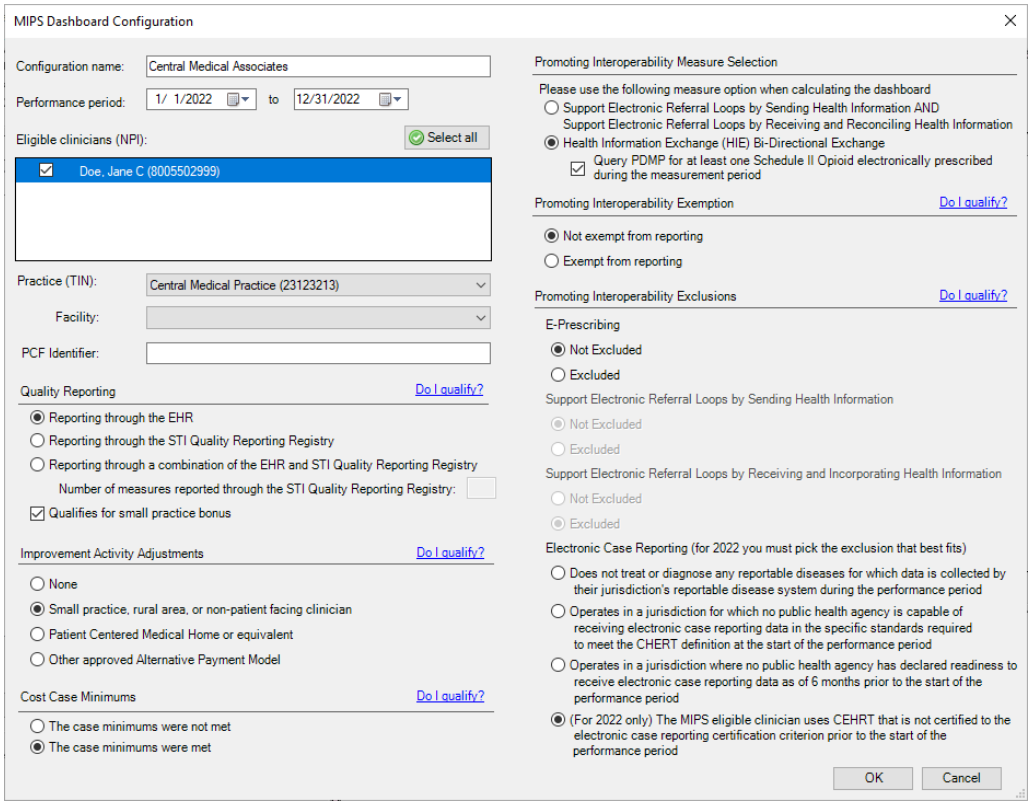


Figure 10 – MIPS Dashboard Configuration

Added Features (continued)

- **The Note Tab – Charge Items/Review Charges –** The Diagnoses area of the Charge Items and Review Charges dialogs (**Note** > **Charge Items/Review Charges**) has been updated so that the drop-down list will contain diagnoses based on how the new **Allow selection of all chart diagnoses** preference (see **Preferences – Procedures** entry below) is configured. See Figure 11. When this preference is active (selected), then all chart diagnoses will be available in the drop-down list. When the preference is inactive (not selected), then only those diagnoses that were added, noted, inactivated, or reactivated in the current note will be available in the drop-down list.

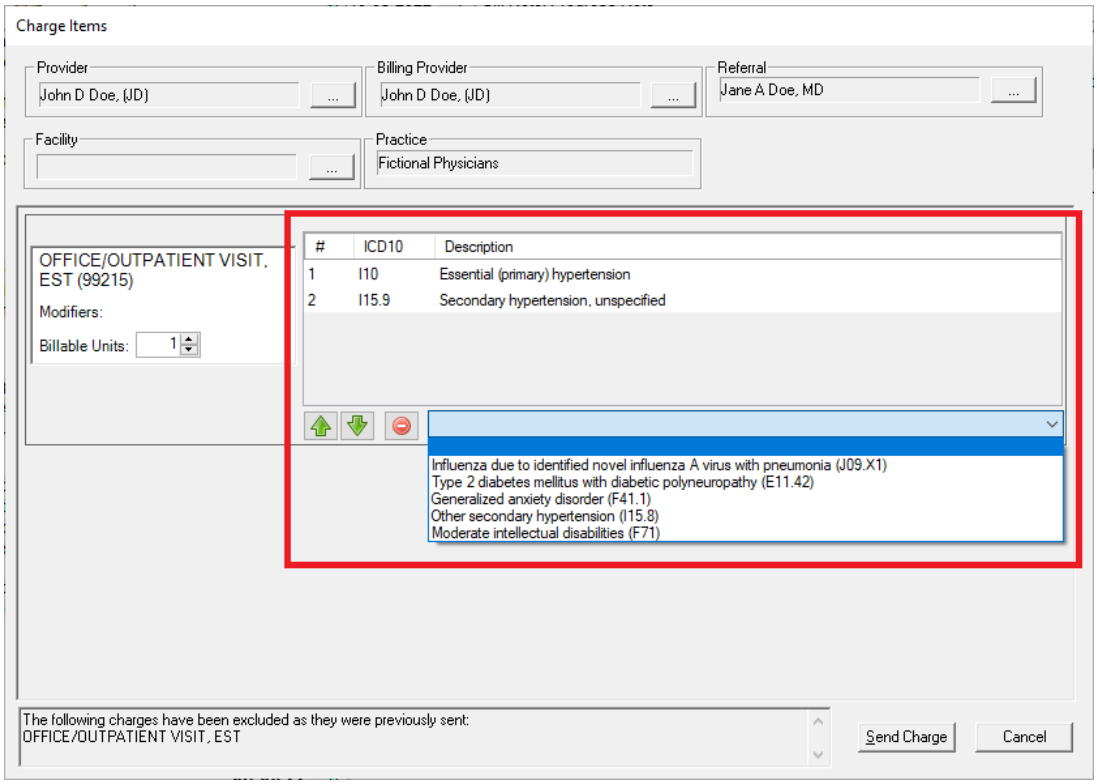


Figure 11 – Charge Items

- **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)

- **The Note Tab – Order Procedure – Procedure Diagnoses –** The Procedure Diagnoses section of the Order Procedure dialog has been updated so that the drop-down list will contain diagnoses based on how the new **Allow selection of all chart diagnoses** preference (see **Preferences – Procedures** entry below) is configured. See Figure 12. When this preference is active (selected), then all chart diagnoses will be available in the drop-down list. When the preference is inactive (not selected), then only those diagnoses that were added, noted, inactivated, or reactivated in the current note will be available in the drop-down list.

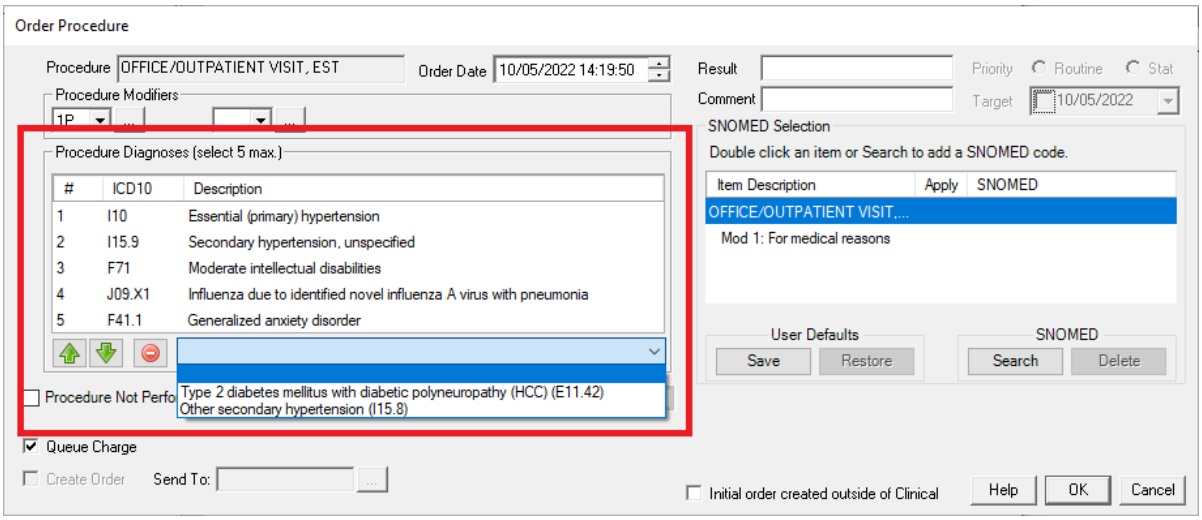


Figure 12 – Order Procedure – Procedure Diagnoses

Added Features (continued)

- **Patient Access –** With the implementation of the updated ChartMaker® API, the **Patient Access** dialog has been updated to reflect the changes regarding how the patient is enabled and registered for the API. See Figure 13. To this end, the **ChartMaker® PatientPortal** section of the dialog, previously PatientPortal account settings section, contains the options to authorize the patient for the PatientPortal, as well as options to exclude unsigned results and to disable the sending of notes, labs, and scans when signing for the PatientPortal. These latter two options no longer pertain to the API, and the various warning message when these two options are selected have been updated to this end.

  The **ChartMaker® API** section, previously the API Access section, has been updated to enable information about the ChartMaker® API to be sent to, or printed for, the patient. An authentication code is no longer generated. Patients will need to register for the API in the Patient ChartMaker® API Administration screen (accessed via **Chart** > **ChartMaker® API** > **Patient Administration**). Also, the Status Legend has been updated regarding the suspended status, as it only applies to the PatientPortal now.

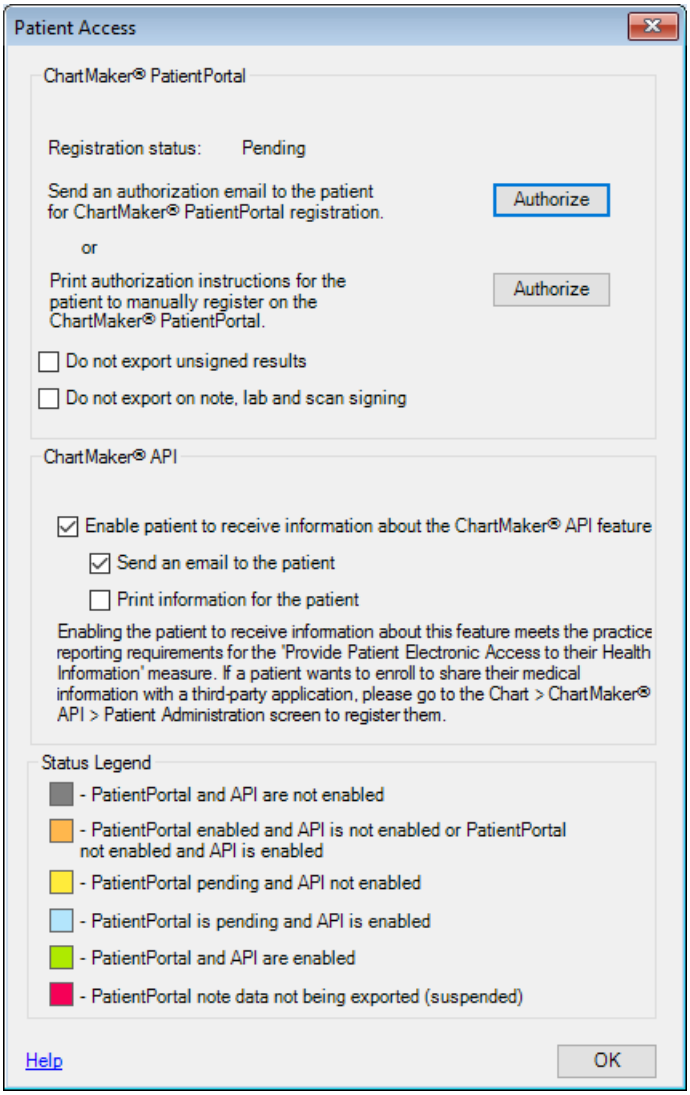


Figure 13 – Patient Access

Added Features (continued)

- **Preferences — Orders/Order Sets –** The **Orders/Order Sets** tab, in the Preferences dialog, has been updated with an **Appropriate Use Criteria** section that contains an **AUC URL** and a **CDSM Name** field allowing you to configure a URL and the name of a qualified Clinical Decision Support Mechanism (CDSM) you will be utilizing when ordering imaging procedures to comply with the Appropriate Use Criteria program requirements. See Figure 14. In previous versions, these fields were in the Procedure tab, and now reside in the Orders/Order Sets tab. The functionality of these fields remains the same.

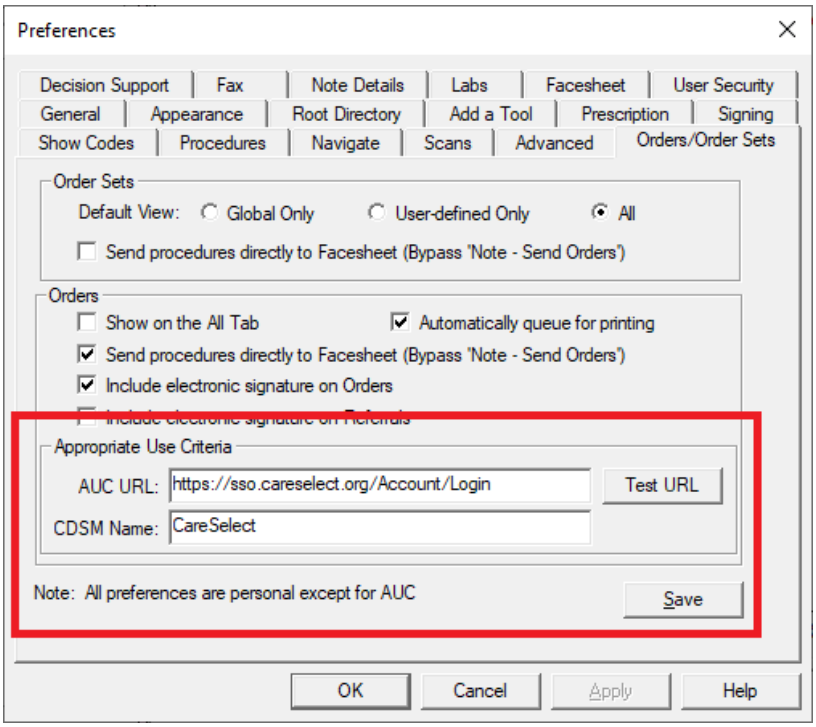


Figure 14 – Preferences – Orders/Order Sets

- **Preferences — Procedures –** The **Order Procedure Screen** section of the **Procedures** tab, in the Preferences dialog, has been updated with a new **Allow selection of all chart diagnoses** preference that allows you to determine whether all chart diagnoses can select in the **Procedure Diagnoses** section of the **Order Procedure** dialog, and in the **Charge Items/Review Charges** dialog; or if only those diagnoses that were added, noted, inactivated, or reactivated in the current note can be selected. See Figure 15. The When the **Allow selection of all chart diagnoses** preference will be unchecked by default and only added or noted diagnoses will be able to be selected in the Order Procedure and Charge Items dialogs. When this preference is checked and active, any chart diagnosis will be available in the drop-down list for selection.

  Likewise, the **Auto-populate note diagnoses** label has been renamed, it was labelled **Auto-populate 'Procedure Diagnoses' Section** in previous versions.

  In addition, the **AUC URL** and **CDSM Name** fields have been removed from the Procedures tab and have moved to the Orders/Order Sets tab.

Added Features (continued)

- **Preferences — Procedures –** The **Charges** section of the **Procedures** tab, in the Preferences dialog, has been updated with a new **Send charges to Practice Manager when signing a note** preference that will default to inactive (not selected). See Figure 15. In addition, the **Do not allow billing provider selection** option has been renamed **Do not allow billing provider selection from Charge Items screen**.

  When the **Send charges to Practice Manager when signing a note** preference is active (checked/selected), the system will not allow you to send charges via the Chart Items screen when the note is unsigned. When the note is unsigned, the Note menu will display a **Review Charges** option (**Note** > **Review Charges**), instead of the Charge Items option, and clicking the Review Charges menu option will open a Review Charges dialog. The Review Charges dialog will display the same information as the Charge Items dialog; however, you are only able to edit the **Billable Units** and **Diagnoses**, and then **Save** that information. You cannot send information to Practice Manager via the Review Charges dialog.

  Upon signing the note, the Charge Items dialog will automatically appear if there are billable charges, with any previous changes made in the Review Charges dialog included, and you can now modify **Provider**, **Billing Provider** (if applicable), **Referral**, **Billing Units**, and **Diagnoses** as needed, and then **Send Charges**. Do note, if you click the **Cancel** button in the Charge Items dialog, a pop-up message will appear indicating, "**You have chosen not to send charges to Practice Manager for this note. Would you also like to cancel the signing process?**" If you click **Yes**, the not will remain unsigned and you are able to make changes. If you click **No**, the note will be signed, and no charges will be sent to Practice Manager. Also, if additional billable procedures need to be added after the note is signed, you will need to unsign the note, add the additional procedures, resign the note, and then send those procedures when presented with the Charge Items dialog.

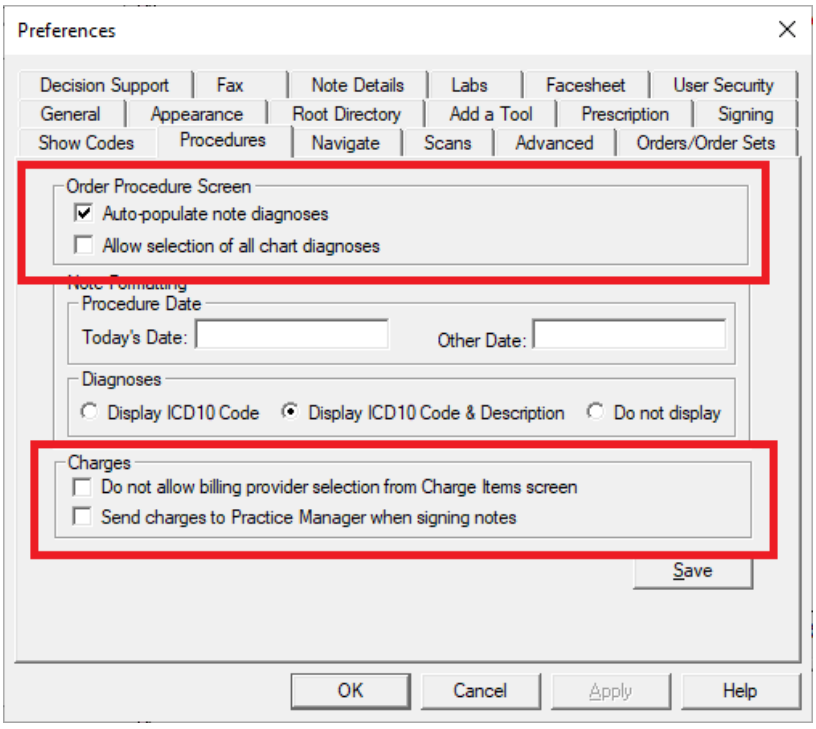


Figure 15 – Preferences – Procedures

- **STI Reporting Registry – Healthmonix –** In previous versions, an issue could arise where certain chart note data was not being uploaded to Healthmonix. This issue has been corrected.

Added Features (continued)

- **System Tables – Users – Privileges –** A new **To-Do List Access Restrictions** privilege has been created allowing you to determine if a user can view other users' To-Do List in Clinical. See Figure 16. The **None** privilege has no restrictions and allows the user access and view other users' To-Do Lists; the **All** privilege prevents a user from accessing any other users' To-Do List. When the **All** privilege is selected, the **Change User For List** option will be grayed out in the To-Do menu, and the **Owner** drop-down list will be disabled in the floating To-Do List (**To-Do** > **View To-Do List**). Any changes made to this privilege is tracked in the Audit Trail.

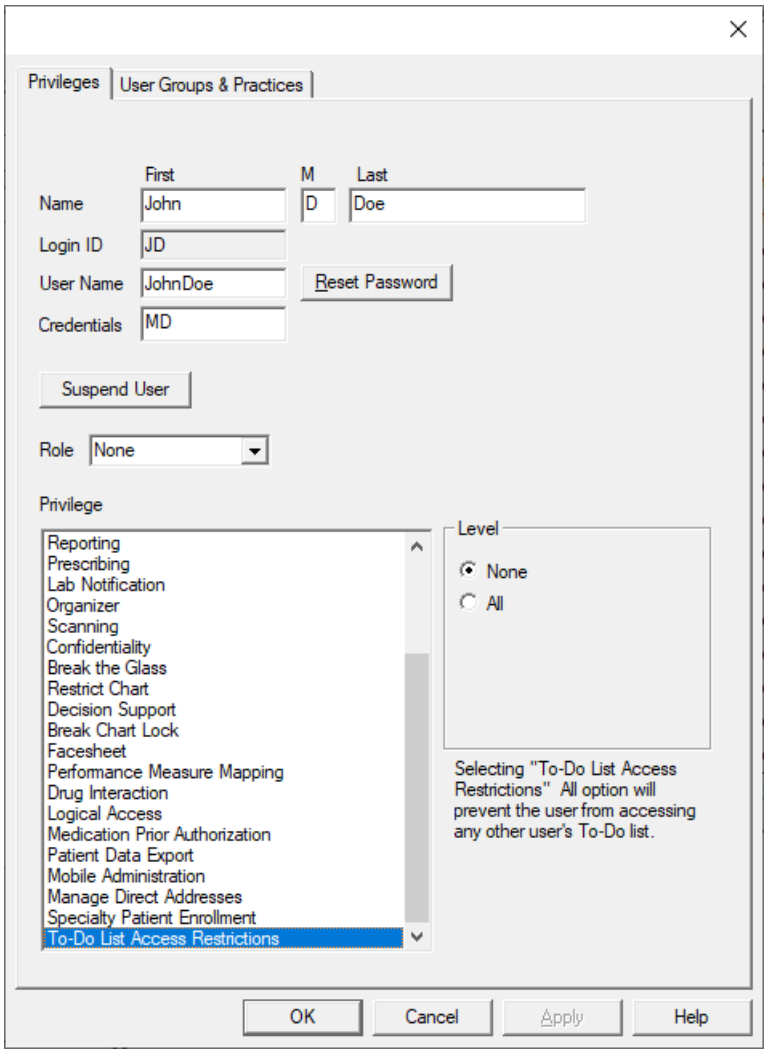


Figure 16 – System Tables – User – To-Do List Access Restrictions Privilege

- **The To-Do List — Transfer –** In previous versions, an issue could arise when transferring a To-Do List item to another user where the item is not being transferred to the selected user. This issue has been corrected.

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