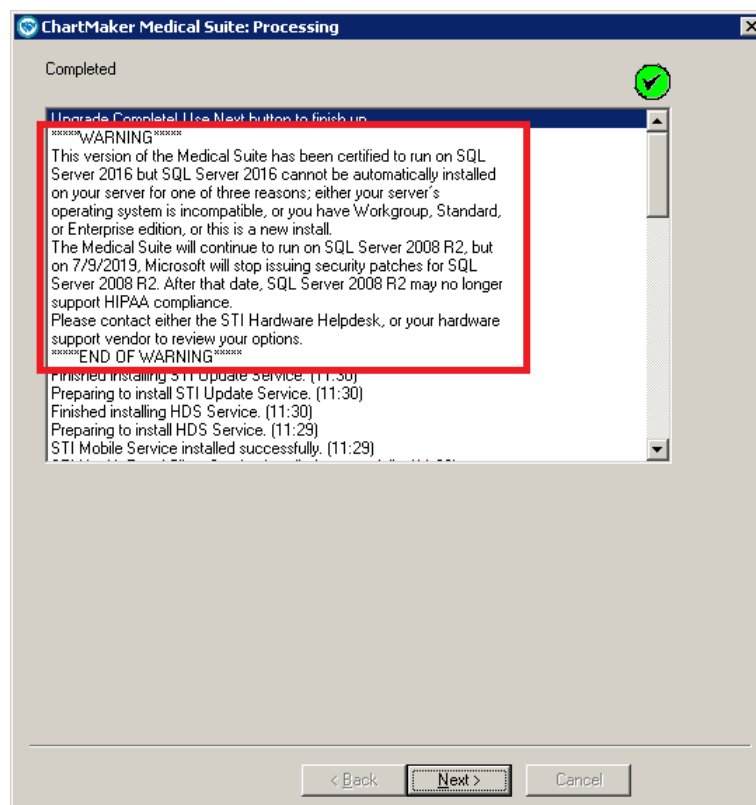


## ChartMaker® Practice Manager Release Notes

### ChartMaker® 2018.2 (fv6.4.6)

#### Important Notifications

- **Electronic Patient Statements** – If your office sends electronic patient statements (EPS), you must upgrade to CMMS 6.4.5 or later. The 6.4.5 and later versions will resolve the electronic patient statement transmission issue that occurred at the end of February 2020. Please reference the email notification sent to your office on March 3, 2020. Do note that STI handles all updates for Cloud clients.
- **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**

## Administration

- **Administration – Preferences – System Level Preferences** – The **Charge Preferences** section, in the **Charge** tab of the Maintain System Default Preferences dialog, has been updated with a **Maintain Diagnoses when Case is changed** option. See Figure 1.

When the **Maintain Diagnoses when Case is changed** option is checked, when entering a new charge or processing a pending charge, any diagnoses that were currently entered for the charge will remain if the Case is changed.

When the **Maintain Diagnoses when Case is changed** option is not checked, when entering a new charge or processing a pending charge, any diagnoses that were currently entered for the charge will be removed if the Case is changed. Likewise, if any default diagnoses were configured for the newly selected Case, those will populate the Diagnosis field. If no default diagnoses were configured for the newly selected Case, the Diagnosis field will be blank.

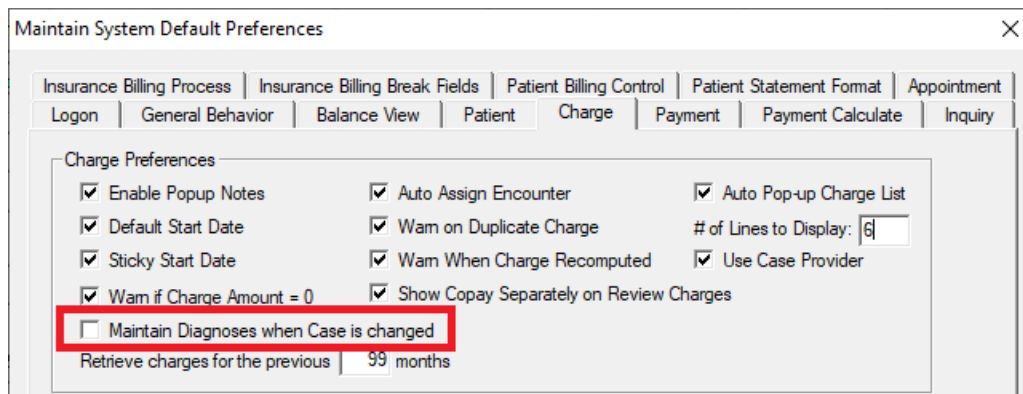


Figure 1 – Maintain System Default Preferences – Charge

- **Administration – Preferences – Practice Level Preferences** – The **Charge Preferences** section, in the **Charge** tab of the Maintain System Default Preferences dialog, has been updated with a **Maintain Diagnoses when Case is changed** option. See Figure 2.

When the **Maintain Diagnoses when Case is changed** option is checked, when entering a new charge or processing a pending charge, any diagnoses that were currently entered for the charge will remain if the Case is changed.

When the **Maintain Diagnoses when Case is changed** option is not checked, when entering a new charge or processing a pending charge, any diagnoses that were currently entered for the charge will be removed if the Case is changed. Likewise, if any default diagnoses were configured for the newly selected Case, those will populate the Diagnosis field. If no default diagnoses were configured for the newly selected Case, the Diagnosis field will be blank.

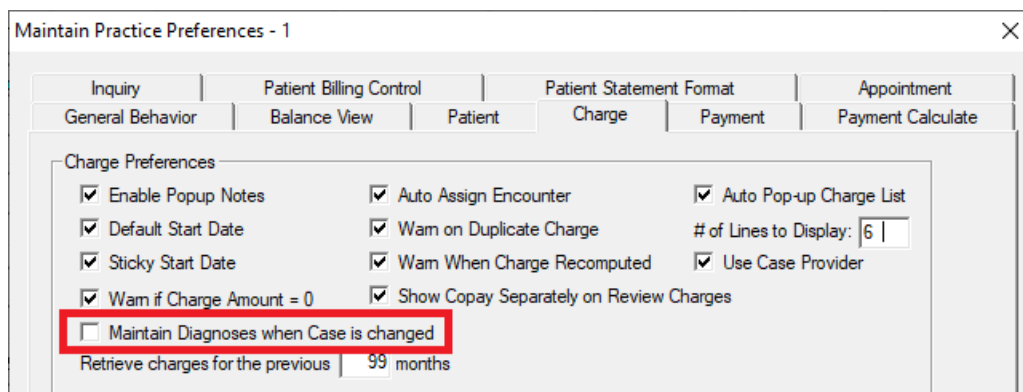


Figure 2 – Maintain Practice Preferences – Charge

## Appointment

- **Appointment – Check-In Status** – The menu, when right-clicking a patient’s appointment in the Check-In List, has been updated with a **Print Future Appointments, Cancel, No Show (N), Detail, and History** option, allowing you to easily perform these functions from the Check-In List. See Figure 3. Do note, when multiple appointments are selected, the Print Future Appointments, Detail, and History options will be disabled in the menu.

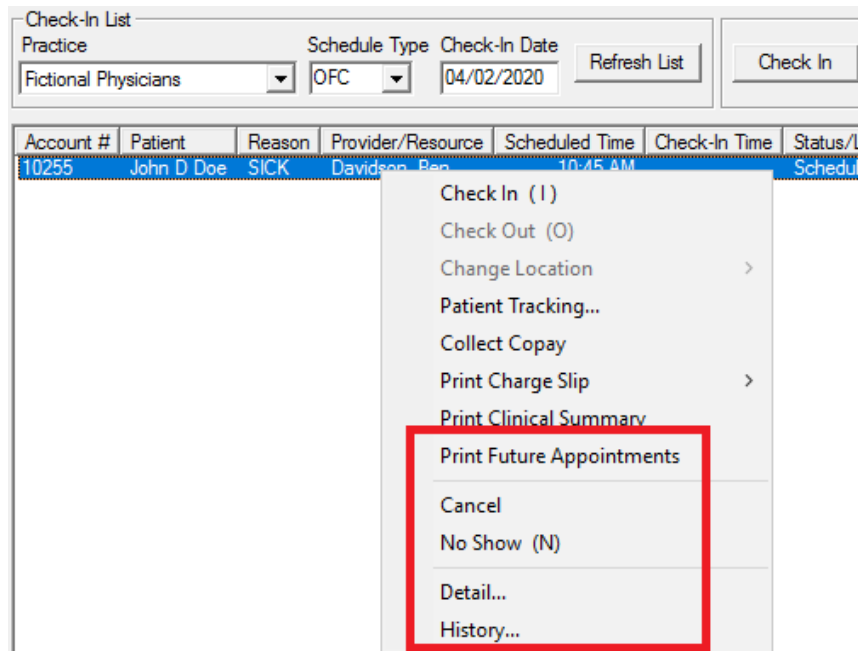


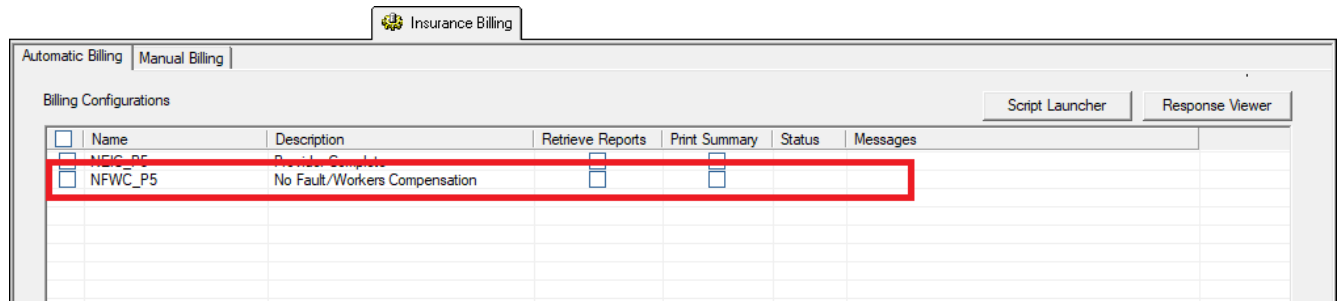
Figure 3 – Check-In Status – Check-In List – Right-Click Menu

## Clinical

- **Clinical – Immunization** – The program has been updated to ensure that the latest Vaccine Information Statements (VISs) for DTaP (Diphtheria, Tetanus, and Pertussis), TD (Tetanus and Diphtheria), TDaP (Tetanus, Diphtheria, and Pertussis), Yellow Fever, and “Your Child’s First Vaccines” – Multi-Vaccines, per the latest CDC guidelines, are used for immunization procedures.
- **Clinical – Immunization – Immunization Registry – Submission Status** – The Submission Status dialog (**Administration > Registries > Immunization > Submission Status**) has been updated so that when hovering over the status of a failed immunization, the status error will display in a tooltip and will remain visible until the you move the mouse cursor away from the failed immunization, allowing you to easily read longer error messages. Likewise, if you double-click the status of a failed immunization, a pop-up window will appear containing the error text allowing you to easily read the error message. When hovering over a successful immunization, no tooltip will appear, and when double-clicking that immunization, the immunization itself will open as normal.

## Insurance Billing

- **Insurance Billing – Automatic Billing – No Fault/Worker’s Compensation Claims** – The system has been updated to automate the billing process for collecting and transmitting No Fault and Worker’s Compensation claims via the Automatic Billing tab. See Figure 4. Email [swsupport@sticomputer.com](mailto:swsupport@sticomputer.com) to schedule an appointment to have your office converted from the Manual Billing tab to the Automatic Billing tab.



**Figure 4 – Insurance Billing – Automatic Billing**

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