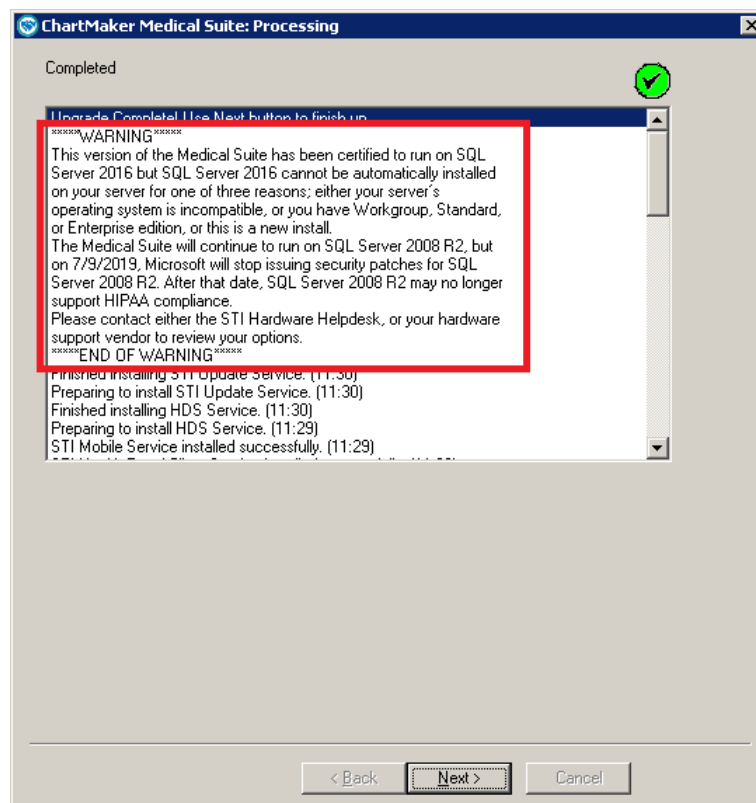


ChartMaker® Practice Manager Release Notes

ChartMaker® 2018.2 (fv6.4.7)

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.



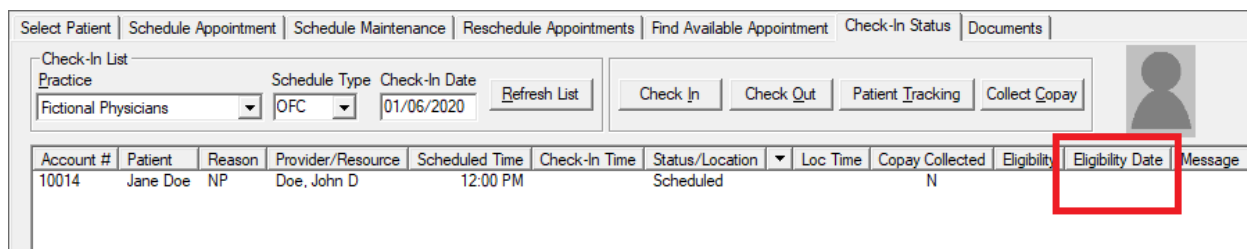
ChartMaker Medical Suite SQL Server 2016 Warning

Administration

- **Administration – Utilities – Audit – Audit Trail** – The Audit Trail has been updated to track whenever a practice is added or deleted. When an audit event occurs, the Event column will display **Added** or **Deleted**; the Group column will display **Practice**; the Audit Trail Description will display the **Practice Added** or **Practice Deleted**; the New Value will display the **[Practice Name]** when a practice is added; the Old Value will display the **[Practice Name]** when a practice is deleted; and the **Practice Name, Address, Phone, Fax, Tax ID, NPI,** and **Taxonomy** information will be listed in the Metadata column.

Appointment

- **Appointment – Check-In Status** – The Check-In List has been updated with an **Eligibility Date** column that will display the date of the most recent eligibility request for the patient if one exists. See Figure 1. This new column works in conjunction with the Eligibility column which lists the most recent eligibility status for the patient if one exists. Do note, however, there can be an Eligibility Date without a value in the Eligibility field.



The screenshot shows a software interface for a 'Check-In List'. At the top, there are navigation tabs: 'Select Patient', 'Schedule Appointment', 'Schedule Maintenance', 'Reschedule Appointments', 'Find Available Appointment', 'Check-In Status', and 'Documents'. Below these is a 'Check-In List' section with a search bar for 'Practice' (set to 'Fictional Physicians'), a 'Schedule Type' dropdown (set to 'OFC'), a 'Check-In Date' field (set to '01/06/2020'), and a 'Refresh List' button. To the right are buttons for 'Check In', 'Check Out', 'Patient Tracking', and 'Collect Copay', along with a user profile icon. Below this is a table with the following columns: Account #, Patient, Reason, Provider/Resource, Scheduled Time, Check-In Time, Status/Location, Loc Time, Copay Collected, Eligibility, Eligibility Date, and Message. A single row of data is visible, and the 'Eligibility Date' column is highlighted with a red box.

Account #	Patient	Reason	Provider/Resource	Scheduled Time	Check-In Time	Status/Location	Loc Time	Copay Collected	Eligibility	Eligibility Date	Message
10014	Jane Doe	NP	Doe, John D	12:00 PM		Scheduled		N			

Figure 1 – Check-In Status – Check-In List – Eligibility Date Column

Clinical

- **Clinical – Immunization** – 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.
- **Clinical – Immunization – Immunization Registry – VFC Eligibility Reconciliation** – The system has been updated with a new **VFC Eligibility Reconciliation** dialog (**Administration > Registries > Immunization > VFC Eligibility Reconciliation**) that allows you to reconcile, at the end of day, all immunizations that were submitted to registries against their respective VFC eligibilities, thereby allowing you to address any missed or incorrectly entered VFC eligibility information and manually access the registry to update your inventory for submitted immunization(s), as needed. See Figure 2.

When first accessing the VFC Eligibility Reconciliation dialog, the Select Date Range section will default the **Immunization Submitted From** and **To** date fields to today's date, and the **Practice** and **Provider** fields in the Filter By section, will default to **All Practices** and **All Providers**. You can modify the dates in the Select Date Range section, **or choose a preset value** (Today, Yesterday, This Week, Last Week, This Month, or Last Month). You can also choose to filter the information by **Practice**, **Provider**, or **Account #** in the Filter By section.

When the select criteria has been configured as desired, click the **Run Report** button to view the applicable patients. The system will then display any immunizations that were submitted, per the configured select criteria, and display the **Registry, Submission Date/Time, Account #, Patient Name, Immunization Name, Lot #, Expiration Date, NDC, and VFC Eligibility** status (the Eligibility plus the IH code).

Whenever there are any results available, you can click the **Print** button to print the results, or you can double-click a specific record, and the system will attempt to open the applicable chart in Clinical, if the Clinical is currently open and running for the user. If Clinical is not running a message will appear indicating that note could not be opened because Clinical is not running.

Registry	Submission Date/Time	Account #	Patient Name	Immunization Name	Lot #	Expiration Date	NDC	VFC Eligibility
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Figure 2 – VFC Eligibility Reconciliation

Insurance Billing

- **Insurance Billing – NY NF-3 Attending Physician Report** – The system has been updated so that printing when NY NF-3 form, the **Place of Service Including Zip Code** field will now include the zip code of the practice location, and the **Fee Schedule Treatment Code** field will now include the units and any modifiers attached to the charge.

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