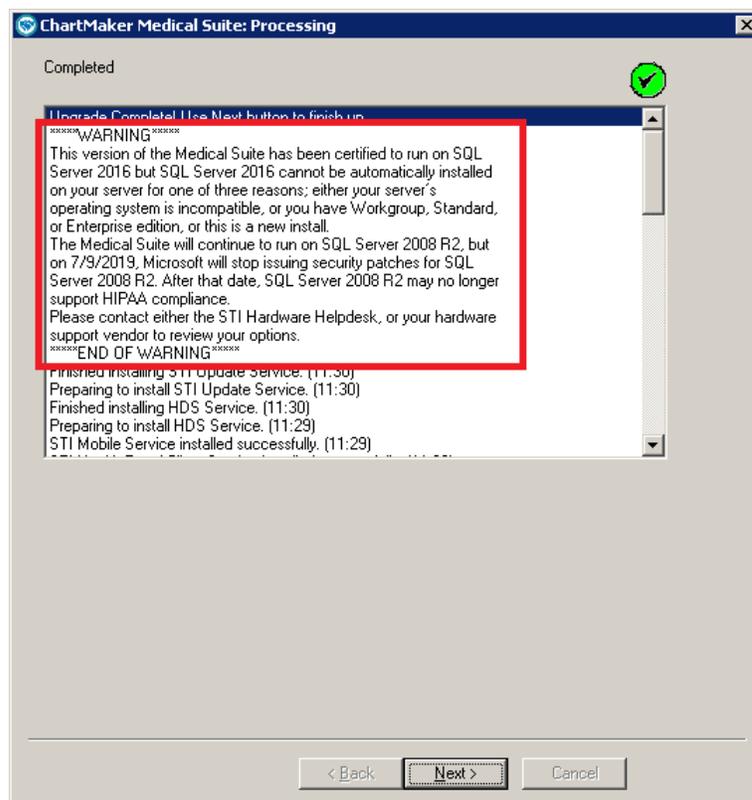


## ChartMaker® Practice Manager Release Notes

### ChartMaker® 2018.2 (fv6.4.8)

#### Important Notifications

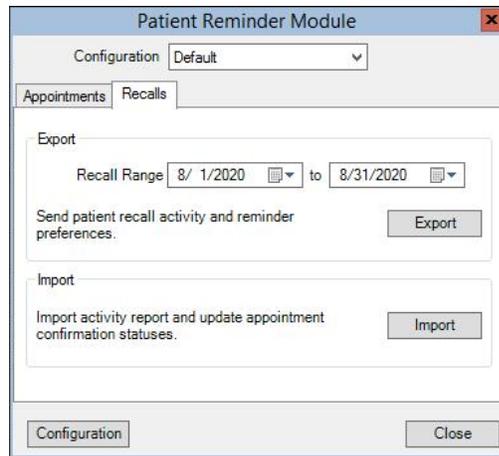
- **Electronic Patient Statements** – If your office sends electronic patient statements (EPS), you must upgrade to CMMS 6.4.5 or later. The 6.4.5 and later versions will resolve the electronic patient statement transmission issue that occurred at the end of February 2020. Please reference the email 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

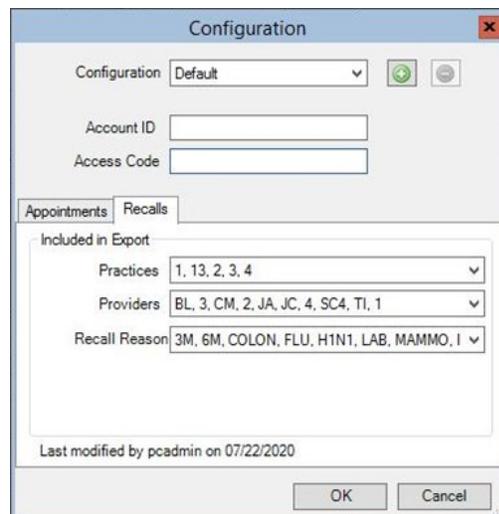
## Add-Ins

**Patient Reminder Module** – The Patient Reminder Module dialog (**Add-Ins > Patient > Patient Reminder Module**) has been updated with a **Recalls** tab that allows you to export and import recall data to and from RevSpring in a similar manner as Appointments. See Figure 1. In the new **Recalls** tab, you can select the appropriate recall dates to send reminders for, using the **Recall Range** fields. The system will default these fields from today's date to 30 days into the future. Clicking the **Export** button will trigger the export, where the system will collect the applicable recall data and then send it to RevSpring. Also, in a similar manner as importing Appointments, you can click the **Import** button to import patient recall activity and update Reminder method throughout the system. After the Import button is clicked, the system will download any recall activity since the last import, update the various reminder methods in the system (**Charge > Patient Recall, Appointment > Select Patient Recall** screen, and **Inquire > Recalls**, etc.), and a Report dialog will appear summarizing the imported details (Account Number, Recall Date, Patient Name, Confirmation Status Updated, and the Details of the contact) that you can print, if needed.

The screenshot shows the 'Patient Reminder Module' dialog box with the 'Recalls' tab selected. At the top, there is a 'Configuration' dropdown menu set to 'Default'. Below this are two tabs: 'Appointments' and 'Recalls'. The 'Recalls' tab contains two sections: 'Export' and 'Import'. The 'Export' section has a 'Recall Range' field with two date pickers, currently showing '8/1/2020' to '8/31/2020', and an 'Export' button. Below it is the text 'Send patient recall activity and reminder preferences.' The 'Import' section has an 'Import' button and the text 'Import activity report and update appointment confirmation statuses.' At the bottom of the dialog are 'Configuration' and 'Close' buttons.

**Figure 1 – Patient Reminder Module – Recalls**

Prior to using the Patient Reminder Module for exporting and importing recall data to and from RevSpring, your system needs to be configured with an Account ID and Access Code for RevSpring via the Configuration dialog (accessed via the **Configuration** button in the Patient Reminder Module dialog). See Figure 2. The appropriate **Practices, Providers, and Recall Reasons** codes selected, will determine what is included in the export via the **Recalls** tab of the Configuration dialog. If your office is currently enrolled in the PRM Recall Reminder Service, an STI Support Representative will contact you to convert your office from using the exporter tool to this new method of transmitting patient recall data. If your office is interested in signing up for the Patient Reminder Module's Services please enroll online at <https://sticomputer.com/solutions/patient-reminders/>.

The screenshot shows the 'Configuration' dialog box with the 'Recalls' tab selected. At the top, there is a 'Configuration' dropdown menu set to 'Default' with a green checkmark and a grey minus sign button. Below this are two text input fields: 'Account ID' and 'Access Code'. Below these are two tabs: 'Appointments' and 'Recalls'. The 'Recalls' tab contains a section titled 'Included in Export' with three dropdown menus: 'Practices' (selected: 1, 13, 2, 3, 4), 'Providers' (selected: BL, 3, CM, 2, JA, JC, 4, SC4, TI, 1), and 'Recall Reason' (selected: 3M, 6M, COLON, FLU, H1N1, LAB, MAMMO, I). At the bottom of the dialog is the text 'Last modified by padmin on 07/22/2020' and 'OK' and 'Cancel' buttons.

**Figure 2 – Configuration – Recall**

## Administration

- **Administration – Utilities – Audit – Audit Trail** – The Audit Trail has been updated to track whenever the **Do not export unsigned results** option is checked in the Patient Access dialog (accessed via the Patient Access button in the patient's facesheet). When an audit event occurs, the Event column will display **Export**; the Group column will display **Patient**; the Audit Trail Description will display **Suspend document export for unsigned results to API and PatientPortal**; and the patient's **Account ID** will be listed in the Metadata column.
- **Administration – Utilities – Audit – Audit Trail** – The Audit Trail has been updated to track whenever the **Do not export unsigned results** option is unchecked in the Patient Access dialog (accessed via the Patient Access button in the patient's facesheet). When an audit event occurs, the Event column will display **Export**; the Group column will display **Patient**; the Audit Trail Description will display **Document export has been enabled for unsigned results to API and PatientPortal**; and the patient's **Account ID** will be listed in the Metadata column.

## Patient

- **Patient – Patient Access** – In conjunction with the 21st Century Cures Act (21CCA), specifically as it details requirements against Information Blocking, the system has been updated so that on November 1, 2020 and after, any electronic results (lab, radiology, etc.) that are received into the ChartMaker Medical Suite will be automatically transferred to the applicable patient's PatientPortal and/or API without needing to be viewed or signed by the provider, if they are activated for Patient Access. Likewise, whenever an unmatched result has been matched to a specific patient, those results will automatically be sent to the applicable patient's PatientPortal and/or API without needing to be viewed or signed by the provider, if that patient is activated for Patient Access.

After the note has been reviewed and signed by the provider, if any comments were added prior to signing, then after signing the system will then automatically resend and replace the results on the patient's PatientPortal and/or API that were automatically sent prior to signing (i.e., the original unsigned results) with an updated note that contains those results and the additional comments, and the patient will be sent a notification that changes were made. If the note does not contain any comments or changes, upon signing no additional exports or notifications will be sent.

There are, however, exceptions to automatically sending electronic results that can be manually configured on a patient basis, should a medical decision be made that it is in the patient's best interest to not automatically send these results. Do note that these exceptions must comply with those exception cases outlined in the 21st Century Cures Act (21CCA), as actors (i.e., providers) can be penalized for conducting information blocking practices that do not comply with those outlined in the final rule.

To this end, the Patient Access dialog (accessed via the **Patient Access** button) has been updated with a **Do not export unsigned results** option. See Figure 3. When this option is checked, the system will *not* automatically send unsigned results to the patient's PatientPortal and/or API. Do note that a warning message outlining the ramifications of checking this option will be generated when you click the **OK** button (see Figure 4), and the system will also track whenever this option is checked or unchecked in the audit trail. When this option is activated, the system will behave as in previous versions where results, notes, labs, and scans are sent to the patient's PatientPortal and/or API upon signing (unless, of course, if the **Do not export on note, lab and scan signing** option is checked).

## Patient (continued)

### Patient – Patient Access (continued)

Patient Access

PatientPortal account settings

Registration status:

Send an authorization email to the patient for PatientPortal registration. Authorize

or

Print authorization instructions for the patient to manually register on the PatientPortal. Authorize

API Access

Enable this patient for API access

Authentication code: FictionalDrsUed8Dasc

Print this patient's authentication code.

Send an email to this patient with their authentication code.

Generate a new authentication code for this patient. Generate

Do not export unsigned results

Do not export on note, lab and scan signing

Status Legend

- PatientPortal and API are not enabled
- PatientPortal enabled and API is not enabled or PatientPortal not enabled and API is enabled
- PatientPortal pending and API not enabled
- PatientPortal is pending and API is enabled
- PatientPortal and API are enabled
- PatientPortal and API have note data not being sent (suspended)

[Help](#) OK

Figure 3 – Patient Access

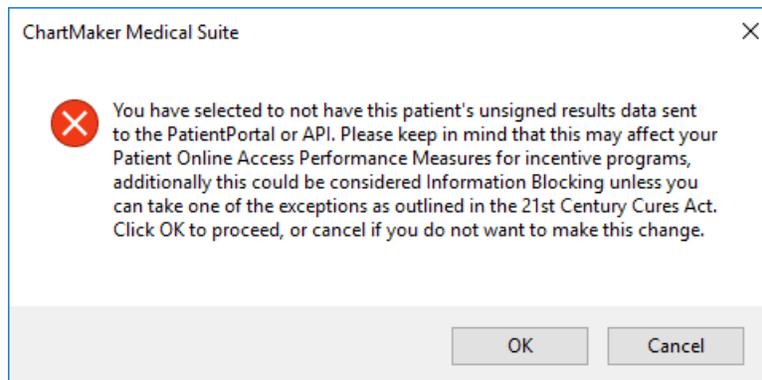


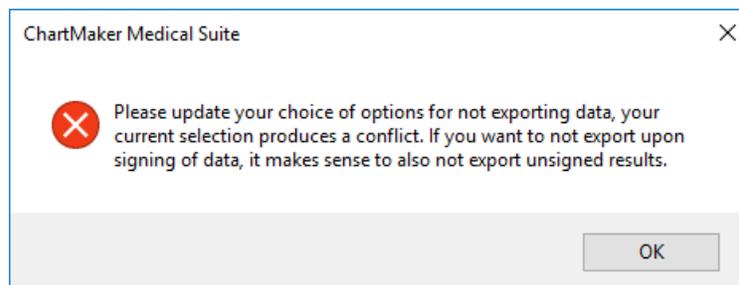
Figure 4 – Patient Access – Do not Export Unsigned Results Warning Message

## Patient (continued)

### Patient – Patient Access (continued)

If the **Do not export on note, lab and scan signing** option is checked, and the **Do not export unsigned results** option is not checked, when you click the **OK** button a warning message will be generated indicating that there is a conflict and you will not be able to continue until both options are checked. See Figure 5. However, the **Do not export unsigned results** option can be checked with the **Do not export on note, lab and scan signing** option not being checked.

Also note, any patient that has the **Do not export on note, lab and scan signing** option checked, when upgrading to this version, the system will automatically check the **Do not export unsigned results** option for that patient, as it is assumed since the patient is not receiving exports when signing should not receive exports for unsigned results.



**Figure 5 – Patient Access – Export Conflict Warning Message**

The features mentioned above are also available and the functionality is the same when accessing Patient Access dialog via the Appointment – Select Patient screen.

## Patient (continued)

- **Patient – Patient Reminder** – The Patient Reminder Preferences dialog (accessed via the **Patient Reminder** button in the Patient screen), has been updated with a **Patient doesn't want to be contacted for Appointments** checkbox and a **Patient doesn't want to be contacted for Recalls** checkbox. See Figure 6.

Patient Reminder Preferences

To configure your patient's reminder preferences, please enter the information below. If you are using the Patient Reminder Module, your patient will be contacted based on your practice's configurations. If you need additional information, please reference the help link on this screen.

Patient doesn't want to be contacted for Appointments

Patient doesn't want to be contacted for Recalls

Contact Preferences

Email:

Primary number:  Primary Home

Secondary number:

Tertiary number:

Appointment Contact Preference

Phone calls allowed

Text messages allowed

These preferences will not affect recalls. Recall contact methods are configured by an STI representative.

[Help](#)

Patient Representatives OK Cancel

Figure 6 – Patient Reminder Preferences

When the **Patient doesn't want to be contacted for Appointments** checkbox is checked, the system will not export appointment contact information to RevSpring for the patient. Likewise, the Appointment Contact Preference section of the dialog will be grayed out. When the **Patient doesn't want to be contacted for Recalls** checkbox is checked, the system will not export recall contact information to RevSpring for the patient. When both options are checked, both the Contact Preferences section and the Appointment Contact Preference section will be grayed out. Also note that if no information is selected in the Contact Preferences section, when exiting the dialog via the **OK** button, a warning message will be generated indicating that no contact preferences were selected and the patient will not be contacted for patient reminders. See Figure 7. If you click the OK button, the system will automatically check the **Patient doesn't want to be contacted for Appointments** and **Patient doesn't want to be contacted for Recalls** checkboxes upon closing.

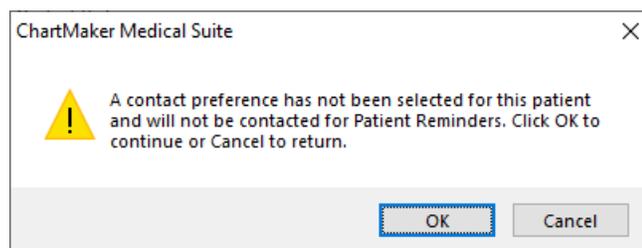


Figure 7 – Contact Preference Warning Message

## Patient Billing – Patient Pay Online

- **Electronic Statement – Practice Setup** — The Electronic Statement – Practice Setup dialog (accessed via **Add-Ins > Patient Billing > Elect Stmt Practice Setup**) has been updated with a **URL** field that allows you to enter a URL for your practice that allows patients to pay their bill online, along with some descriptive text (up to 80 characters) as needed. See Figure 8. Whenever there is information in the URL field, the text and URL will print on the electronic patient statements on the top section of the patient statement.

This new feature works in conjunction with the **Patient Pay Online (PPO)** service we have partnered with InstaMed to provide to our clients that allows your patients to pay their bills online in a simple, seamless, and secure interface that can be accessed anywhere. With this service, patients can view and pay their Healthcare Bill on any device including a mobile phone, tablet, laptop, or desktop computer.

If you are interested in this NEW Patient Pay Online service and currently use InstaMed as your banking merchant, onboarding can begin immediately. If you currently use another banking merchant, we will assist you in transitioning to InstaMed, so you can take advantage of this time saving feature.

If you would like to offer this valuable feature to your patients, you must enrollment with both STI and InstaMed. You can enroll for with us via our website at <https://sticomputer.com/patient-pay-online/>, and someone from our STI team will contact you.

***Please note, integration of automatic posting of those patient payments is not currently available, but will be in a future release.***

Electronic Statement - Practice Setup

Use this name and address as the "Remit To" address on the statement: \*

Name:

Address 1:

Address 2:

Zip Code:  City:  State:

MC

Visa

Disc

Amex

Last Payment

Collection

Ins Pending

Next Appt

Alternate Practice Address

Use this name and address as the return address on the statement: \*

Name:

Address 1:

Address 2:

Zip Code:  City:  State:

Country:

URL:

Special Message:

\* If name and address are left blank, the Practice's name and address will be used.

Save Cancel ?

**Figure 8 – Electronic Statement – Practice Setup**

## System

- **System Change** — In conjunction with the new Patient Reminder Module features that allow you to import and export recall information to RevSpring, the **Reminder Preference** field found in the Patient (Additional Information tab), Charge (Patient Recall tab), Inquire (Recalls tab), and Appointment – Recall dialog has been removed to avoid confusion on how the reminder preferences are configured for appoints and recalls. Likewise, the Patient Recall reports, along with any sort/selection criteria, as well as Letters and Labels have been updated so reference to these obsolete fields have been removed.

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