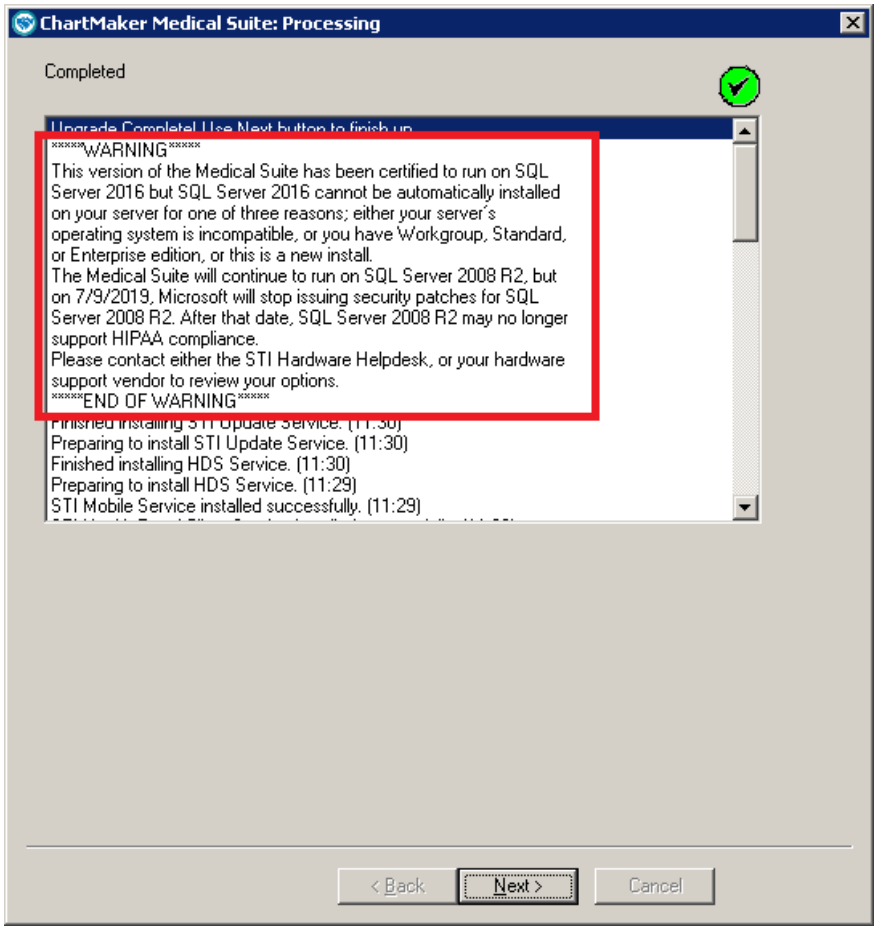
ChartMaker® Practice Manager Release Notes

ChartMaker® 2018.2 (fv6.5.3)

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

- **Administration – Preferences – System Level Preferences –** The **Payment** tab, of the Maintain System Default Preferences dialog, has been updated with a **Default Payment Type for InstaMed payments** field that allows you to configure the default payment type you want to be used when posting payments from InstaMed in the Pending Payments tab of the Payment screen, or when creating a credit from a pending payment received from InstaMed in the Enter a Credit tab of the Payment screen. See Figure 1.

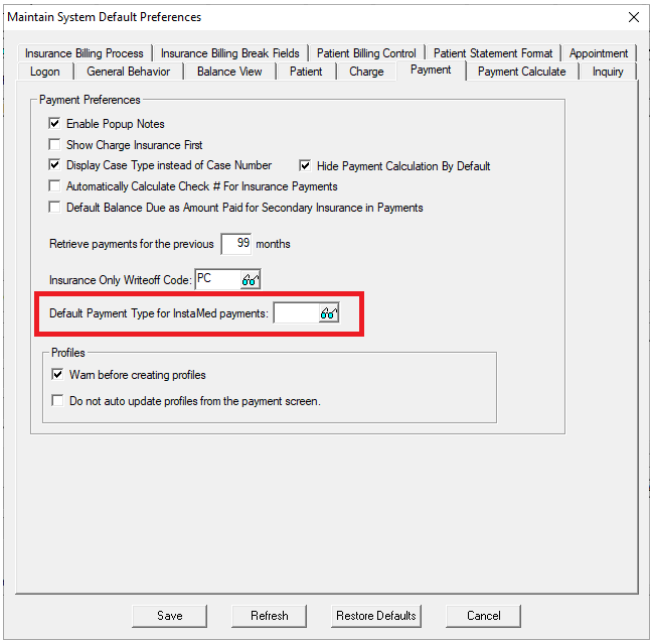


Figure 1 – Maintain System Default Preferences

- **Administration – Preferences – Practice Level Preferences –** The **Payment** tab, of the Maintain Practice Preferences dialog, has been updated with a **Default Payment Type for InstaMed payments** field that allows you to configure the default payment type you want to be used when posting payments from InstaMed in the Pending Payments tab of the Payment screen, or when creating a credit from a pending payment received from InstaMed in the Enter a Credit tab of the Payment screen. See Figure 2.

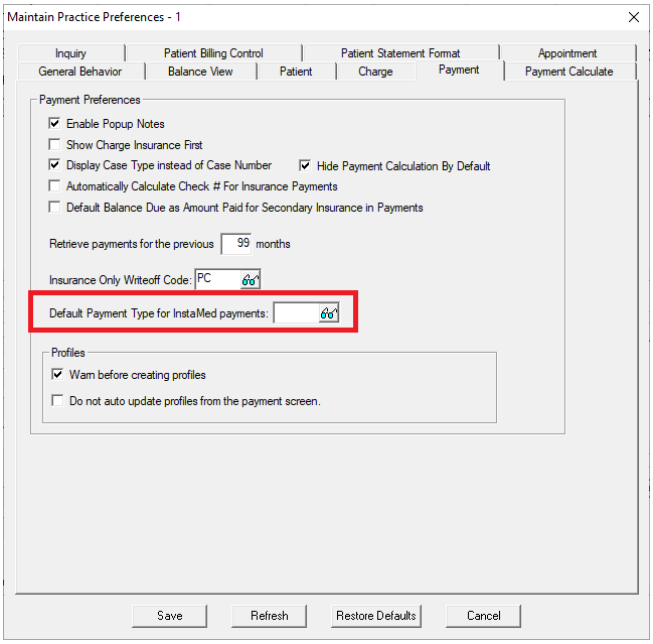


Figure 2 – Maintain Practice Preferences

- **Administration – Preferences – Screen Config – Payment Grid –** The Review Payments view, of the Payment Grid Column Order dialog, has been updated with a **From Pending Payments** heading that allows you to modify the position this column will appear in the Review Payments tab of the Payment screen. See Figure 3.

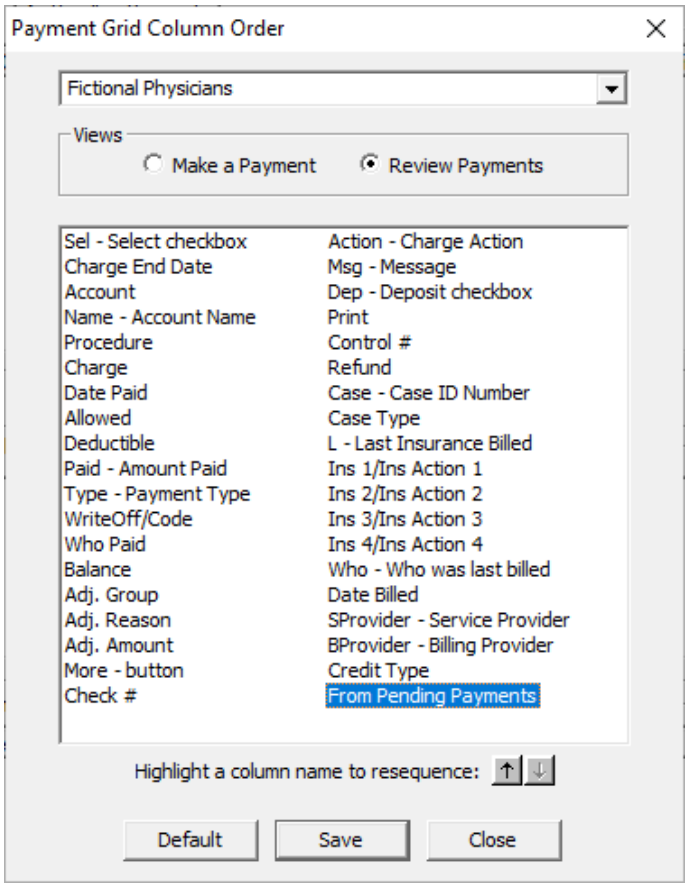


Figure 3 – Payment Grid Column Order

- **Administration – Utilities – Audit – Audit Administration –** The Audit Administration dialog has been updated with a **Payment** audit item that allows you to control whether payments that are created from the Pending Payments tab in the Payment screen will be audited. See Figure 4. This audit item will default as checked and will audit these types of payments unless it is changed.

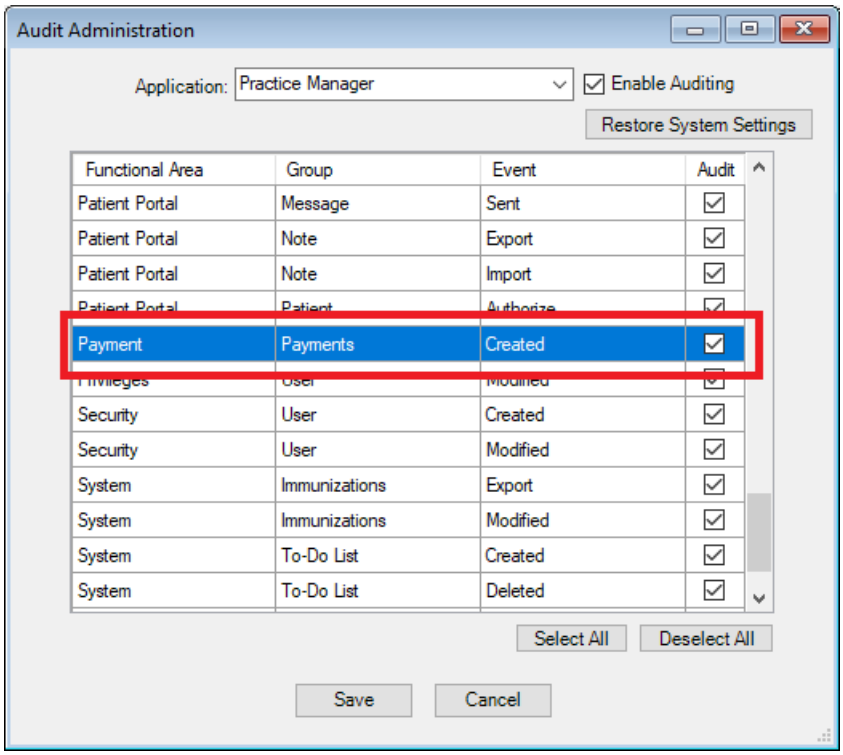


Figure 4 – Audit Administration

- **Administration – Utilities – Audit – Audit Trail –** The Audit Trail has been updated to track whenever a payment has been created from the Pending Payments tab. When an audit event occurs, the Event column will display **Created**; the Group column will display **Payments**; the Audit Trail Description will display **Payment: Date: [MM/DD/YYYY] Amount: $[XX.XX]**; and the patient's **Account ID** will be listed in the Metadata column. See Figure 5.



Figure 5 – Audit Trail

Clinical

- **Clinical – Immunization** – The Immunization section of the Immunization Entry dialog has been updated so that whenever a COVID-19 vaccine **CVX Code** is selected for the immunization, a **Priority Group** drop-down field will appear below the Administered By field, allowing you to select the priority group type the patient falls into for the vaccine. See Figure 6. The Priority Group type is required when sending COVID-19 immunization information for NYSIIS, and when configured, will be included in the OBX segment of the immunization file. If you click the **Priority Group** link a legend will appear outlining the priority types. See Figure 7.

- **Clinical – Immunization*** – The Priority Group drop-down list and legend have been updated with three new codes that can be used when sending COVID-19 immunization information to NYSIIS: **Pregnant**, **Eligible Age**, and **Under 30 Years**. See Figure 7.

  * This feature was released in the CMMS 6.5.3.398 hot fix release.

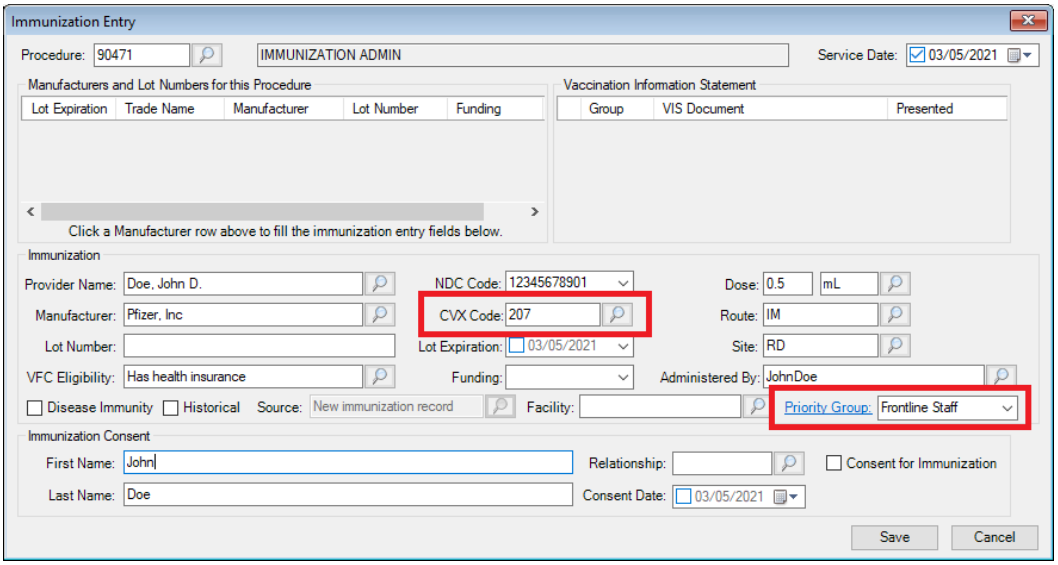
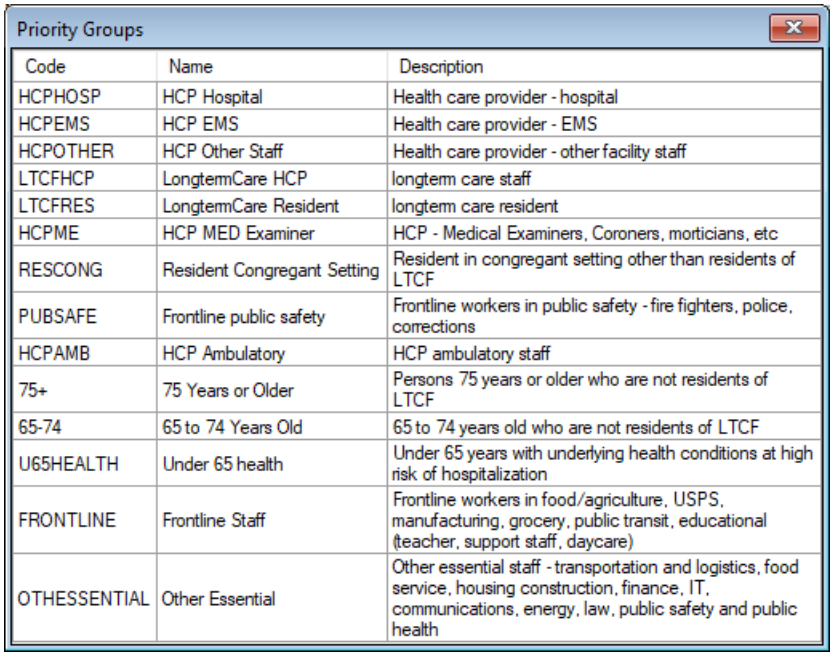


Figure 6 – Immunization Entry – Immunization



Code	Name	Description
HCPHOSP	HCP Hospital	Health care provider - hospital
HCPEMS	HCP EMS	Health care provider - EMS
HCPOTHER	HCP Other Staff	Health care provider - other facility staff
LTCFHCP	LongtermCare HCP	longterm care staff
LTCFRES	LongtermCare Resident	longterm care resident
HCPME	HCP MED Examiner	HCP - Medical Examiners, Coroners, morticians, etc
RESCONG	Resident Congregant Setting	Resident in congregant setting other than residents of LTCF
PUBSAFE	Frontline public safety	Frontline workers in public safety - fire fighters, police, corrections
HCPAMB	HCP Ambulatory	HCP ambulatory staff
75+	75 Years or Older	Persons 75 years or older who are not residents of LTCF
65-74	65 to 74 Years Old	65 to 74 years old who are not residents of LTCF
U65HEALTH	Under 65 health	Under 65 years with underlying health conditions at high risk of hospitalization
FRONTLINE	Frontline Staff	Frontline workers in food/agriculture, USPS, manufacturing, grocery, public transit, educational (teacher, support staff, daycare)
OTHESSENTIAL	Other Essential	Other essential staff - transportation and logistics, food service, housing construction, finance, IT, communications, energy, law, public safety and public health

Figure 7 – Immunization Entry – Priority Groups

Clinical (continued)

- **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.

  * This feature was released in the CMMS 6.5.3.379/398 hot fix release.

General

- **External Interface — PCImport Module** – In the previous versions, an issue could arise when searching for a patient in the Patient Matching dialog, and the system would produce a System Out of Memory Exception error. This issue has been corrected.

Inquire

- **Inquire – Payments – Summary** – The Summary view of the Payments tab, in the Inquire screen, has been updated with a new **From Pending Payments** column, allowing you to easily see if a payment was created from the Pending Payments area. See Figure 8. This column will contain a **Y** if the payment was created via the Pending Payments tab and will contain a **N** if the payment was created any other way.

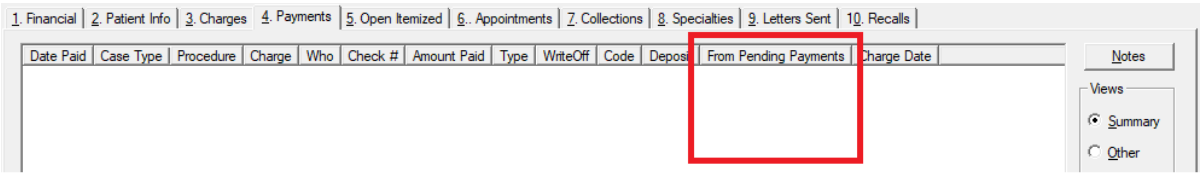


Figure 8 – Inquire – Payments – Summary

Insurance Billing

- **Insurance Billing – Response Viewer –** The Response Viewer has been updated with latest Remittance Advice and Adjustment Codes issued by CMS for viewing and posting ERA 835 (EOB) files (07/01/20 version 3.6.2).

Payment

- **Payment – Review Payments –** The payment grid in the Review Payments tab has been updated with a **From Pending Payments** column that allows you to easily see if the payment was generated from the Pending Payments tab. These payments that were generated from the Pending Payments tab will have a **Yes** in this column. See Figure 9. You can modify the location of this column via the Payment Grid Column Order dialog (**Administration** > **Preferences** > **Screen Config** > **Payment Grid**).

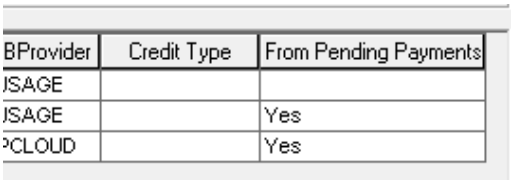


Figure 9 – Payment – Review Payments – From Pending Payments

- **Payment – Enter Credits –** The Enter Credits tab has been updated with a new **Pending Payments** section that will list any pending payments for the selected patient. You can then create a new credit from a pending payment for the total amount of that payment, if applicable. See Figure 10. When creating a new credit, you can highlight a payment in this section, and the **Amount** field, in the Credit Information section, will default to the pending payment amount and will be grayed out and inaccessible. The **Credit Type** will default to **Patient** and will also be grayed out and inaccessible. The Payment Type will default to whatever value is in the **Default Payment Type for InstaMed payments** field in the Payment tab of the Maintain System Preferences (**Administration** > **Preferences** > **System Level Preferences**) or the Maintain Practice Preferences (**Administration** > **Preferences** > **Practice Level Preferences**) dialog. You can modify the Payment Type as needed. The **Date Paid** will default from the pending payment's date paid.

  Once the credit information has been saved, it will appear in the credit listing above, and will have a **Yes** in the **From Pending Payments** column. The pending payment will then be removed from the Pending Payments section below and will no longer appear in Pending Payments tab. You can then apply the credit as any other credit in the system.

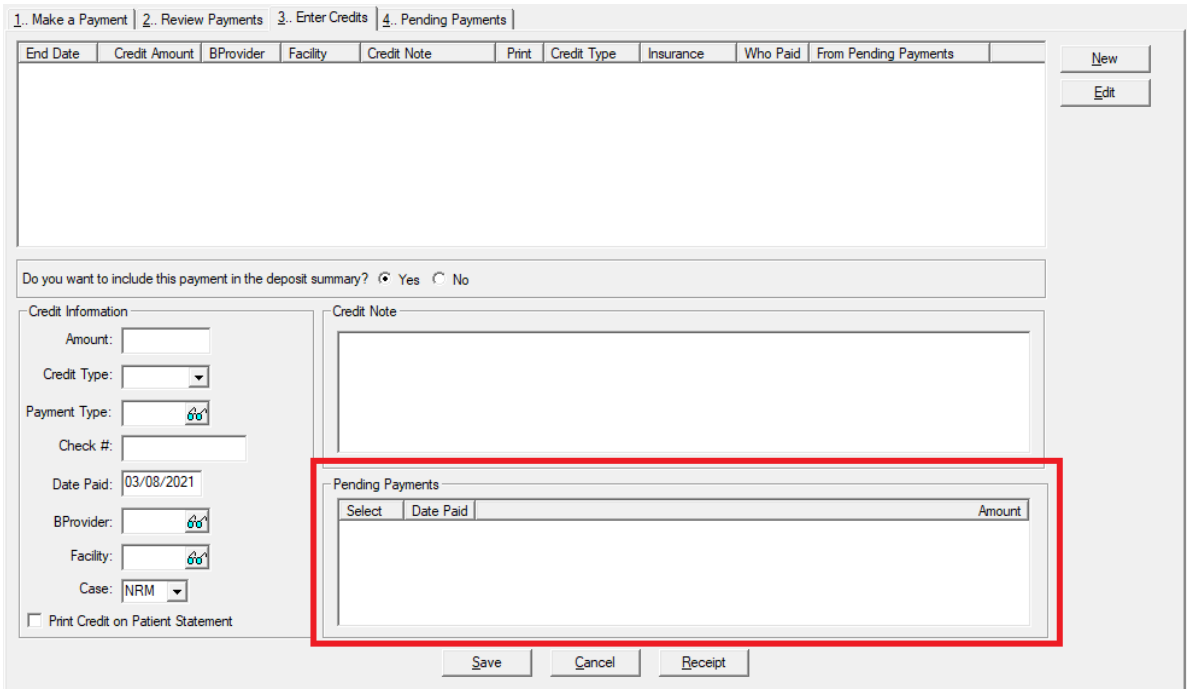


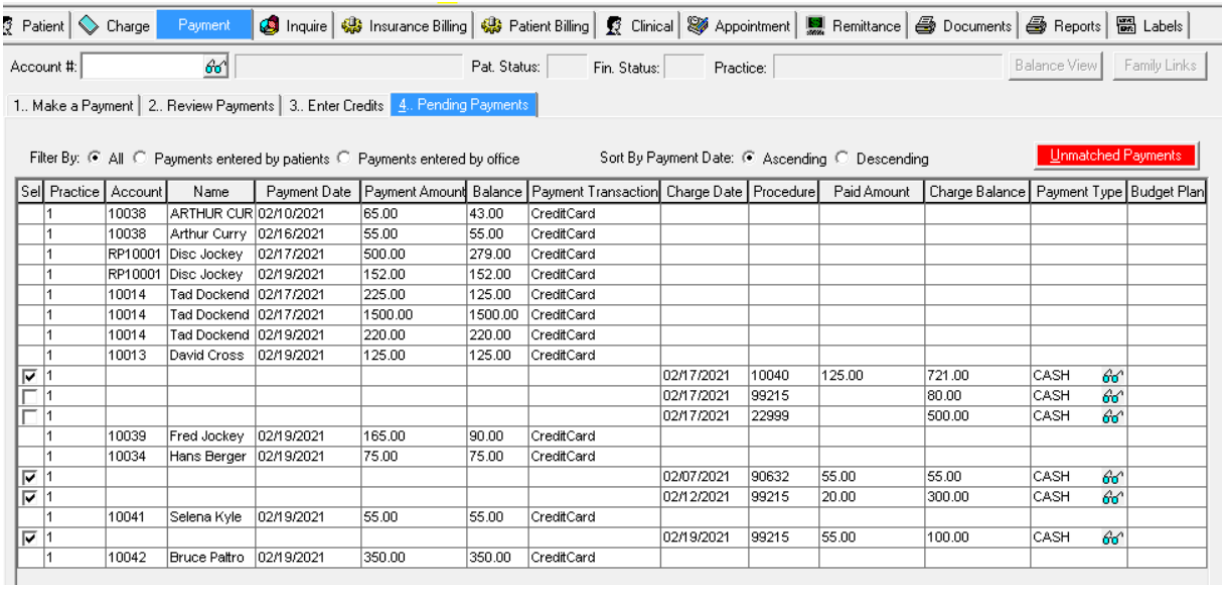
Figure 10 – Payment – Enter Credits – Pending Payments

Payment (continued)

- **Payment – Pending Payments –** In conjunction with our partnership with InstaMed for our Patient Pay Online billing payment solution, that provides a full suite of payment options for patients to pay their bills, the Payment tab has been updated with a Pending Payments tab, that allows you to easily view and post those payments that were received via InstaMed. See Figure 11. If no Account # is entered, the Pending Payments tab will list all pending payments received from InstaMed; if an Account # is entered, only those pending payments for that patient will be listed. You can also filter the payments listed by **All**, which will display all pending payments regardless of them being entered by patient or by office; by **Payments entered by patients**, which will display only those pending payments entered by patient with a patient bill date; and by **Payments entered by office**, which will only display pending payments entered by the office. Likewise, you can sort the pending payments by payment date in **Ascending** order, or **Descending** order.

  In the payment grid, any pending payments, and the open charges for which those may payments apply, will be listed. The payment information will include the patient or the responsible party **Account** number, the patient or responsible party **Name**, the **Payment Date**, **Payment Amount**, payment remaining **Balance**, and the **Payment Transaction** type. For the payments any applicable open charges will be listed directly below the payment, and the applicable charges will be auto selected until the payment balance is used. The charge information will include patient **Name** (if a payment is from a responsible party), **Charge Date**, **Procedure**, **Paid Amount** (being applied from the payment), **Charge Balance**, **Payment Type**, and **Budget Plan** (a Yes will be displayed if the patient has a budget plan).

  You can uncheck and check the applicable charges, as well as configure the modify the Payment Type as needed. When the proper charges are selected, click the **Save** button to apply the payments to those selected charges. Any payments or payment balances that were not applied to a charge, or if there were no open charges selected, will remain in the Pending Payments tab.



Sel	Practice	Account	Name	Payment Date	Payment Amount	Balance	Payment Transaction	Charge Date	Procedure	Paid Amount	Charge Balance	Payment Type	Budget Plan
	1	10038	ARTHUR CUR	02/10/2021	65.00	43.00	CreditCard						
	1	10038	Arthur Curry	02/16/2021	55.00	55.00	CreditCard						
	1	RP10001	Disc Jockey	02/17/2021	500.00	279.00	CreditCard						
	1	RP10001	Disc Jockey	02/19/2021	152.00	152.00	CreditCard						
	1	10014	Tad Dockend	02/17/2021	225.00	125.00	CreditCard						
	1	10014	Tad Dockend	02/17/2021	1500.00	1500.00	CreditCard						
	1	10014	Tad Dockend	02/19/2021	220.00	220.00	CreditCard						
	1	10013	David Cross	02/19/2021	125.00	125.00	CreditCard						
☑	1							02/17/2021	10040	125.00	721.00	CASH	
☐	1							02/17/2021	99215		80.00	CASH	
☐	1							02/17/2021	22999		500.00	CASH	
	1	10039	Fred Jockey	02/19/2021	165.00	90.00	CreditCard						
	1	10034	Hans Berger	02/19/2021	75.00	75.00	CreditCard						
☑	1							02/07/2021	90632	55.00	55.00	CASH	
☑	1							02/12/2021	99215	20.00	300.00	CASH	
	1	10041	Selena Kyle	02/19/2021	55.00	55.00	CreditCard						
☑	1							02/19/2021	99215	55.00	100.00	CASH	
	1	10042	Bruce Paltro	02/19/2021	350.00	350.00	CreditCard						

Figure 11 – Payment – Pending Payments

Payment – Pending Payments (continued)

If there are any unmatched payments, the **Unmatched Payments** button to the right will be highlighted, and if you click it, a Payment Reconciliation dialog will appear allowing you to match the received payments to the correct patient. See Figure 12.

In the Payment Reconciliation dialog, any Unmatched Payments will be listed on the left side of the screen. To match a payment to a patient, simply select the payment on the left, and then in the Select Patient area you can click the **Suggestions** radio button for the system to provide any closely matching patients or click the **Search** radio button to search for a specific patient or responsible party. Once the patient has been located, select it in the list below, and any Open Charges will be listed in the corresponding section below. Click the **Create Pending Payment** button, and the system will match the selected payment to the patient's open charge(s), and they will then be viewable in the Pending Payments tab.

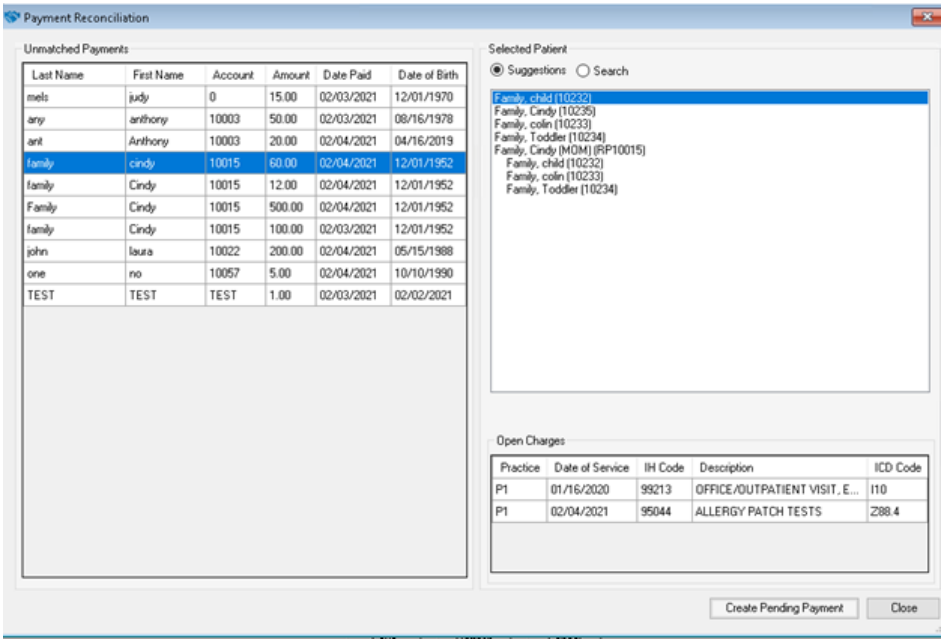


Figure 12 – Payment – Pending Payments – Unmatched Payments

- **Payment – Pending Payments* –** An issue may have occurred when importing payments from InstaMed when a patient or responsible party did not have a first name, last name, or account number. This issue has been resolved.

* This feature was released in the CMMS 6.5.3.373 hot fix release.

Reports

Lists Reports

- **Payment → Pending Payments –** A new **Pending Payments** report has been created to allow you to view any patient payments that were imported from InstaMed's payment portal. This report will default to a Select Criteria of **Paid Date Equal To Today**. However, you can modify the Sort and Select Criteria as needed. This report will display the **Account Number**, patient **Name**, **Date**, and the **Amount** of the payment. In addition, the Payment Type Short Listing report has been moved under the Payment section title, along with this new Pending Payments report.

- **Payment → Pending Payments* –** The **Pending Payments** report has been updated to calculate and display Practice totals, in addition to calculating and displaying a grand total of all pending payments, including unmatched payments. Likewise, a new Matched column has been added to the report to indicate whether the pending payment has been matched or not. A Matched item has also been added to the Sort and Select criteria options, allowing to use the Matched criteria when configuring reports.

  * This feature was released in the CMMS 6.5.3.373 hot fix release.

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