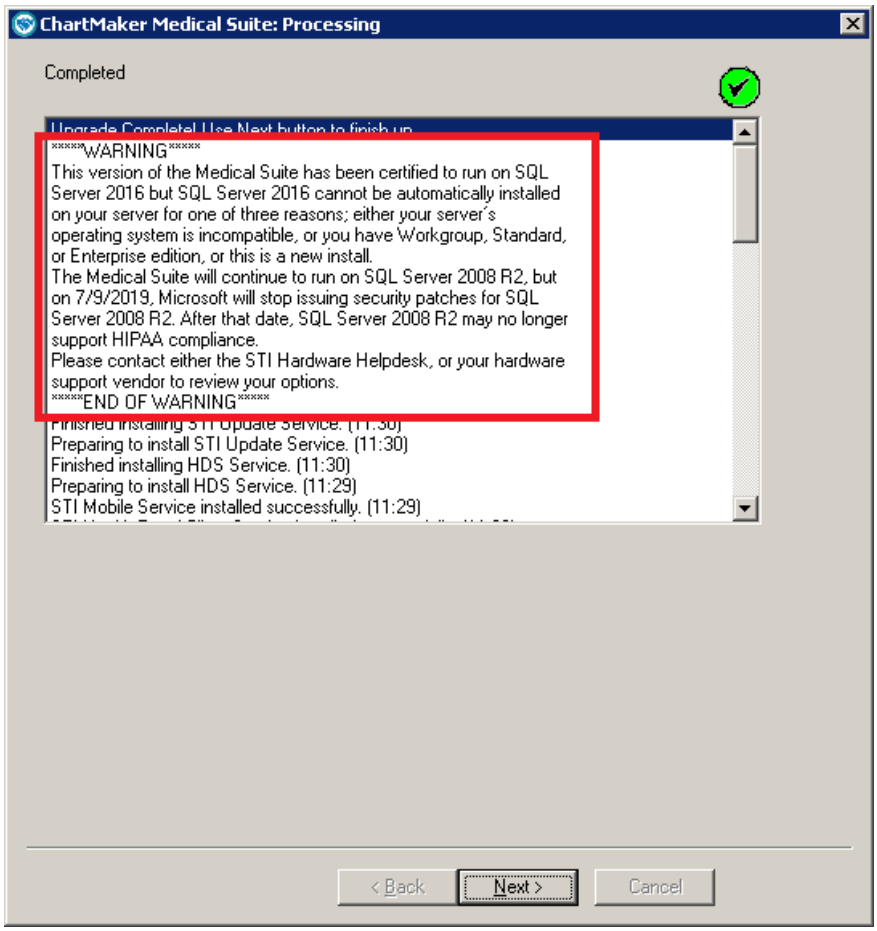
ChartMaker® Practice Manager Release Notes

ChartMaker® 2018.2 (fv6.5.4)

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

- **Administration – Preferences – System Level Preferences* –** In previous versions, an issue could arise where the system was not defaulting the value entered into the **Default Payment Type for InstaMed payments** field in the **Payment** tab of the Maintain System Default Preferences dialog. This issue has been corrected.

  * This feature was released in the CMMS 6.5.4.515 hot fix release.

Appointment

- **Appointment – Select Patient – Reschedule Appointments –** The **Select Patient** tab of the Appointment screen has been updated with a new **Reschedule Appointments** sub-tab that will contain any appointments for the patient that need to be rescheduled. See Figure 1. This new sub-tab functions in similar manner as the Reschedule Appointments tab but will only display appointments that need to be rescheduled for the patient accessed. Likewise, when prompted to view the reschedule list via the pop-up message when accessing a patient in the Appointment screen, if you click **Yes** you will be redirected to this Reschedule Appointments sub-tab.

  When in the Reschedule Appointments sub-tab, you filter appointments by Practice, should the patient be in multiple practices. You can view the Appointment Details for an appointment by double-clicking that appointment, or by highlighting it and then clicking the **Details** button. You can reschedule an appointment by highlighting the appointment and then clicking the **Reschedule** button. Or you can delete an appointment by highlighting the applicable appointment and then clicking the **Delete** button. Once rescheduled or deleted, the appointment will no longer appear in this sub-tab.

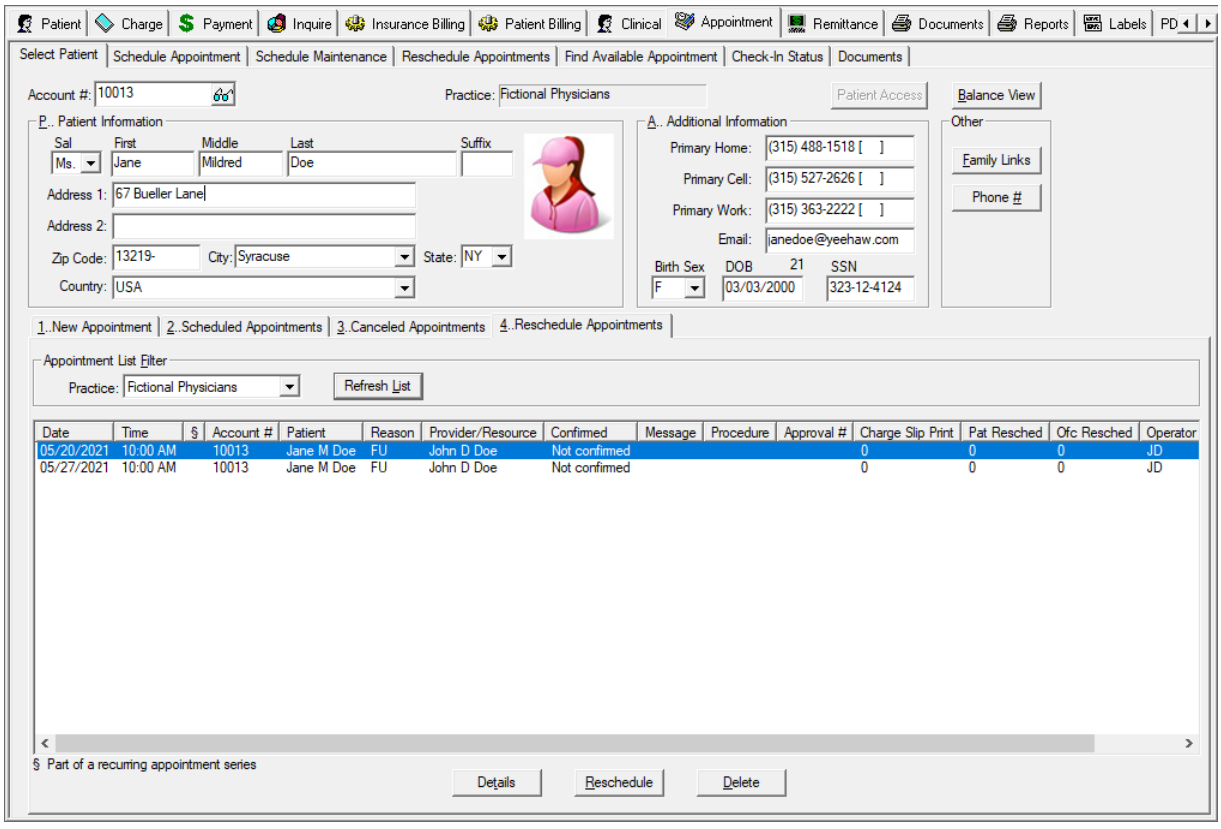


Figure 1 – Appointment – Select Patient – Reschedule Appointments

Charge

- **Charge – Pending Charges** – The system has been updated to improve performance when loading pending charges, allowing faster and more stable experience.

Patient

- **Patient – Adding a Patient** – In previous versions, when adding a patient to another practice, occasionally an inaccurate diagnosis would be attached to that patient in that new practice. This issue has been corrected.

Payer Inquiries

- **Payer Inquiries – Eligibility – Submitted List –** The system has been updated to allow you to delete multiple eligibility response reports in the Submitted List. You can select multiple reports that are sequential by using the **Shift** key (click the first report, then when pressing the Shift key click the last report sequentially, and all the reports between the first and last will be selected) and select multiple report that are not sequential using the **Ctrl** key (while pressing the Ctrl key, click each report you want to delete). After the applicable reports are highlighted, click the **Delete** button. Do note that when multiple reports are highlighted, only the Delete button will be active.

Payment

- **Payment – Enter Credits* –** The Enter Credits tab has been updated so that the Pending Payments section will include any pending payments that are not associated with an open charge, thereby allowing you to create a credit for these pending payments.

  * This feature was released in the CMMS 6.5.4.515 hot fix release.

- **Payment – Pending Payments –** To provide overall consistency throughout the system, the Pending Payments tab has been updated to right-justify any dollar amounts in the **Payment Amount**, **Balance**, **Paid Amount**, and **Charge Balance** columns. All columns not relating to dollar amounts will be left-justified. See Figure 2.

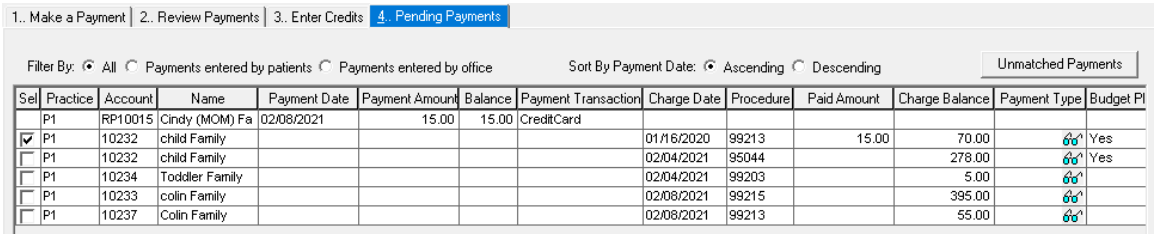


Figure 2 – Payment – Pending Payments

- **Payment – Pending Payments – Unmatched Payments* –** The system has been updated to provide possible patient matches in the Payment Reconciliation dialog, even if those patients do not have an open charge to associate the pending payment.

  * This feature was released in the CMMS 6.5.4.515 hot fix release.

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