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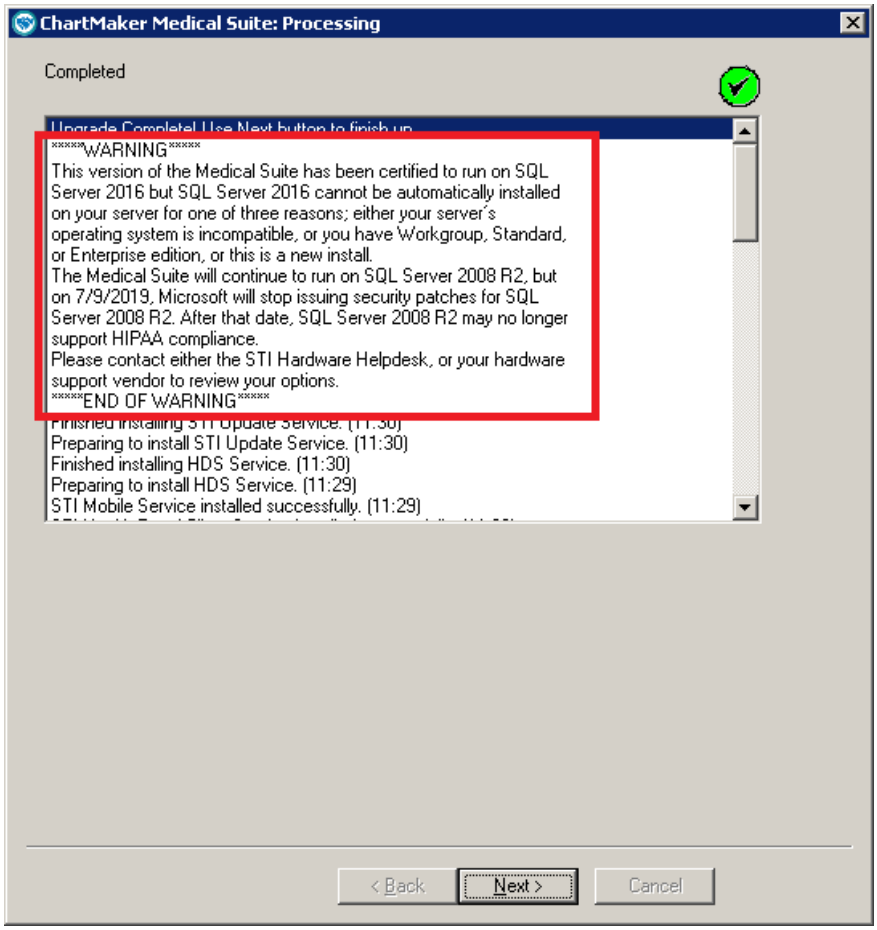
ChartMaker® Practice Manager Release Notes

ChartMaker® 2018.2 (fv6.5.5)

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

Add-Ins

- **Month End – Database Cleanup** – In previous versions, the ChartMaker Medical Suite performance may have been adversely affected while using the STI HL7 Interface to export appointment information after purging old appointments during the Month End process. This issue has been resolved.

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.

Inquire

- **Payments – ERA** – The Payments tab in the Inquire screen has been updated with a new **ERA** button that allows you to view ERA data associated with a specific payment for a patient. See Figure 1. The ERA button will become enabled when a payment is highlighted, and that payment was posted via the ERA through the Remittance module in Practice Manager. The ERA button will also become enabled if the payment was posted manually, because the payment did not post through the automatic remittance, and the ICN number from the ERA is entered in the Control # field.

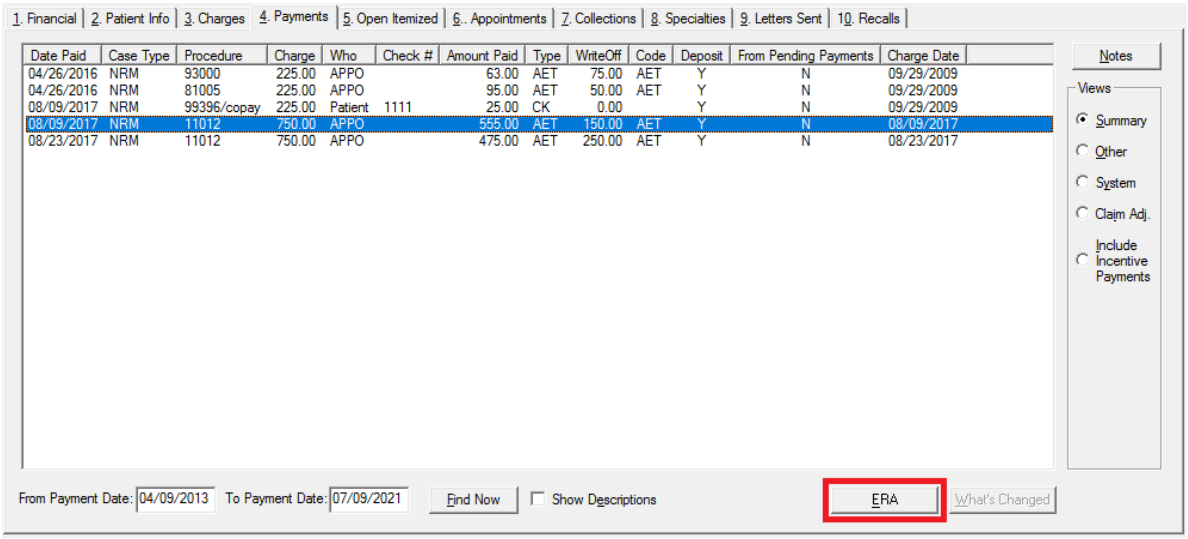


Figure 1 – Inquire – Payments – ERA

Payments – ERA (continued)

Clicking the ERA button, when an applicable payment is highlighted, will open the Response Viewer and the ERA data will be appear for that specific payment. See Figure 2. The ERA data displayed will include the header information from the file, including the payer name, check number and check date, to easily cross-reference the data*. A glossary will be appended to the ERA information allowing you to easily decipher the various explanatory codes in the ERA. Likewise, you have all the functionality of the Response Viewer, should you need to print the ERA information, access the WPC Links, or access other files. If the corresponding imported ERA file has been removed from the PRImported folder on the server, an error will appear indicating that the file associated with payment cannot be found, and the ERA information will not be displayed.

This new feature is available only after updating to CMMS 6.5.5, or above, and then posting ERA files through the Remittance tab. Payment data for previous remittance postings prior to the upgrade will not be available.

* This feature was released in the CMMS 6.5.5.584 hot fix release.

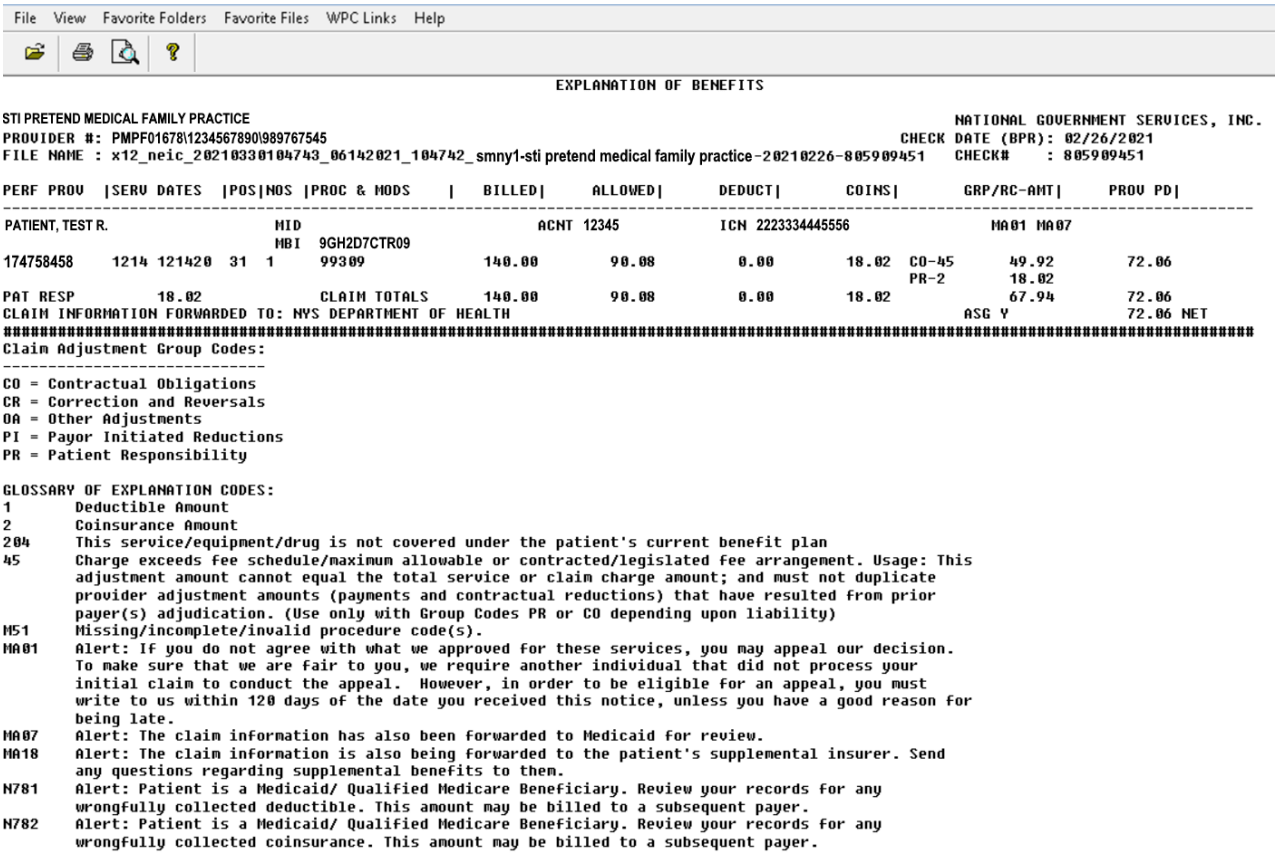


Figure 2 – Response Viewer – ERA

Payment

- **Payment – Pending Payments –** The Pending Payments tab has been updated with a **Delete Mode** button at the bottom of the screen, between the Refresh and Cancel buttons, that allows you to toggle from the posting mode to the delete mode. When clicking the Delete Mode button, the tab will change to delete mode and all the pending payments will be listed. The Select column will turn to a Delete column, and the Save button changes to a Delete button. See Figure 3. Select any pending payments that you want to delete, and then click the **Delete** button. After confirming the deletion, the payments will be deleted, and the deletion will be tracked in the audit trail. A deleted payment cannot be retrieved and restored in the Pending Payments tab. When finished deleting pending payments, you can toggle back to the posting mode by clicking the **Post Mode** button.

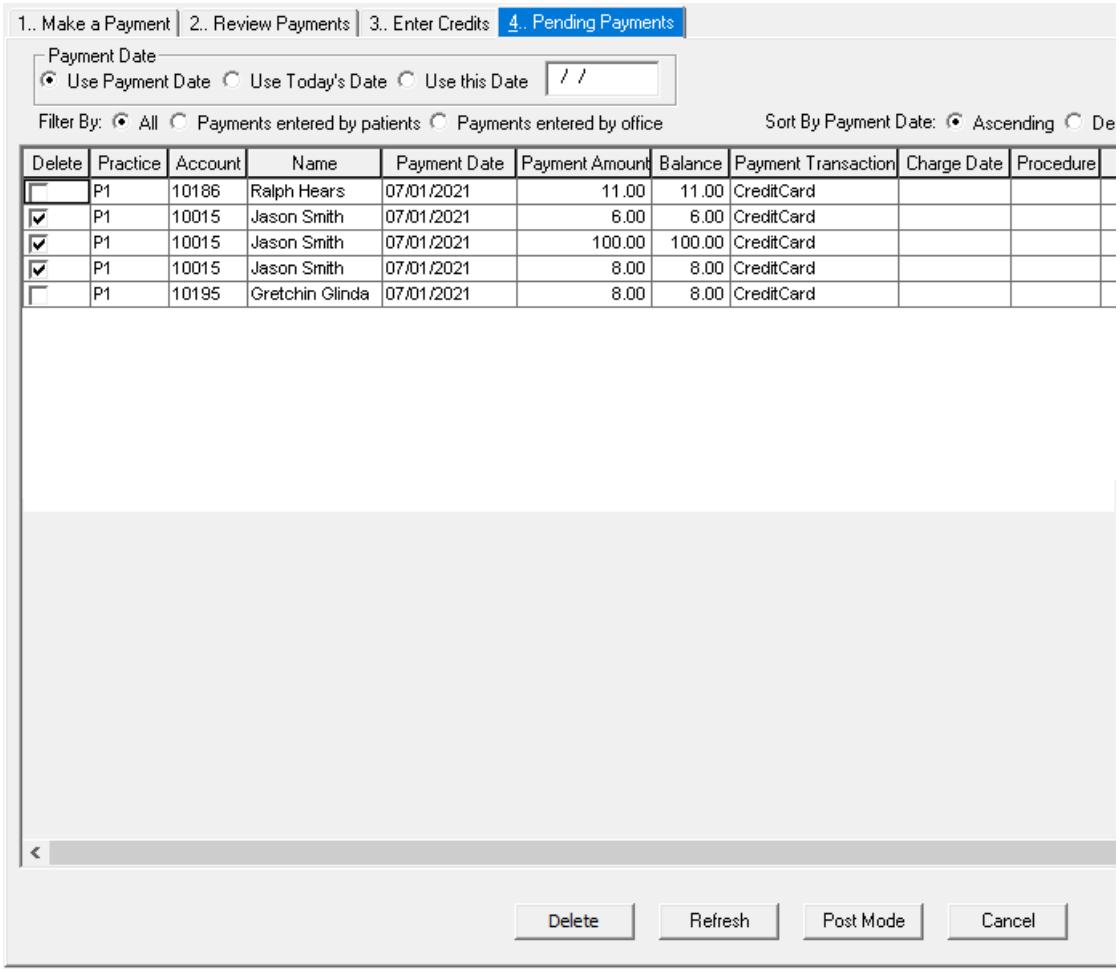


Figure 3 – Payment – Pending Payments – Delete Mode

Payment (continued)

- **Payment – Pending Payments –** The Pending Payments tab has been updated with a **Payment Date** section allowing you to select what payment date to use when posting pending payments. You can select **Use Payment Date**, **Use Today's Date**, or **Use this Date** where you can enter a specific date in the date field to the right. See Figure 4.

  When the **Use Payment Date** option is selected, and there are two or more pending payments selected to post to a charge, and those payments have different payment dates, then a **Pick Payment Date** dialog will appear allowing you to select which payment date you want to use.

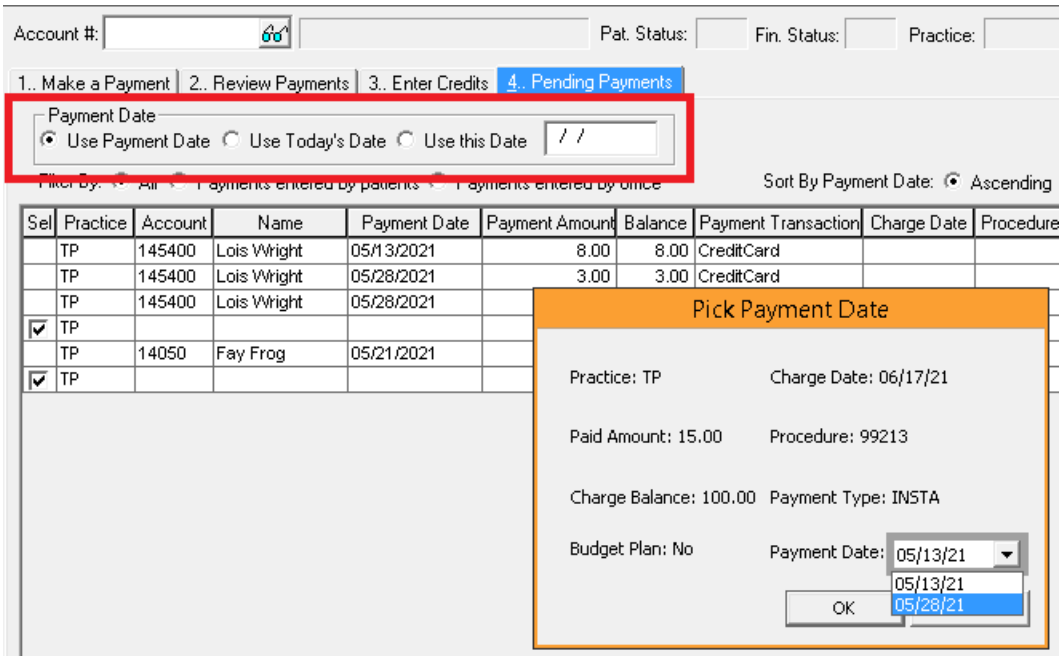


Figure 4 – Payment – Pending Payments – Payment Date

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