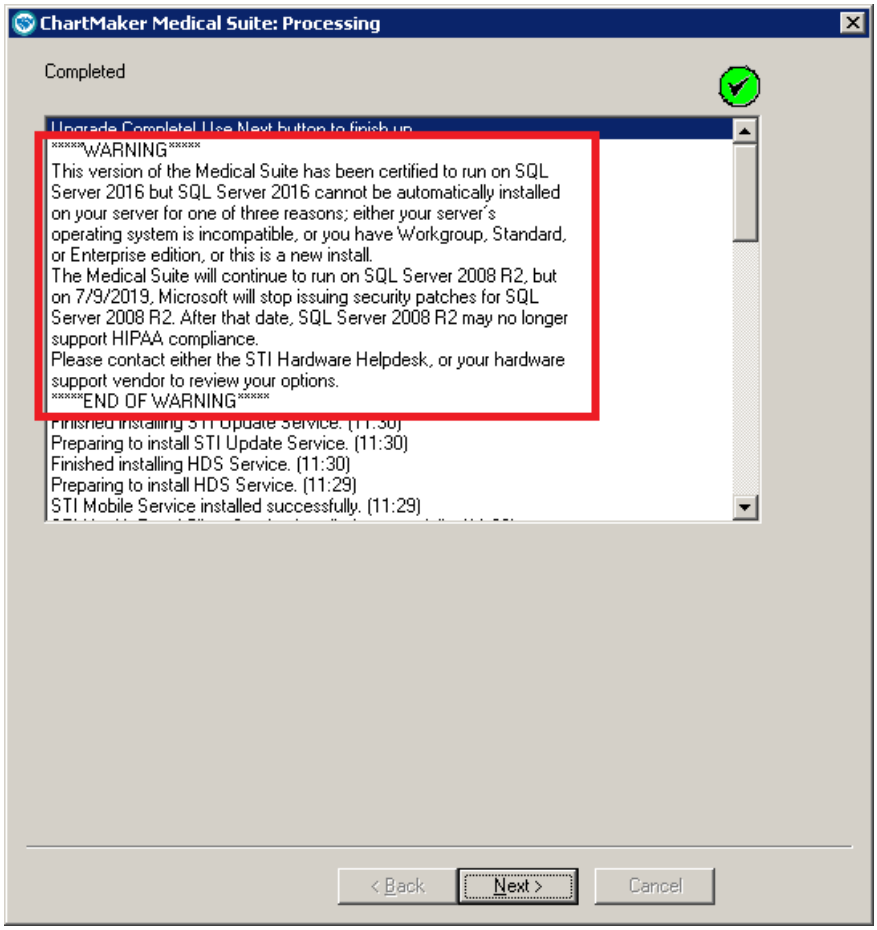
ChartMaker® Practice Manager Release Notes

ChartMaker® 2018.2 (fv6.5.7)

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 –** The **Payment** tab, of the Maintain System Default Preferences dialog, has been updated with a **Pending Payments** section that contains a new **Filter based on user's practice permissions** option and a **Default Payment Type for Patient Pay Online** field. See Figure 1. The latter field was relabeled from the **Default Payment Type for InstaMed payments** field in previous versions and retains the same functionality that allows you to configure the default payment type you want to be used when posting payments from Patient Pay Online (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.

  The new **Filter based on user's practice permissions** option will be checked by default and, when active, will display payment information in the Pending Payments tab depending upon a user's practice permissions configured in the Practice Manager Administration Tool (PCAdmin). If a user does not have permission to access payment information for a practice, when clicking the Pending Payments tab a warning message will be generated indicating, "We're sorry, you do not have access to this screen." When the **Filter based on user's practice permissions** option is unchecked, and inactive, the system will disregard the user's practice permission and display pending payments across all practices, regardless of those permission configured in the Practice Manager Administration Tool (PCAdmin).

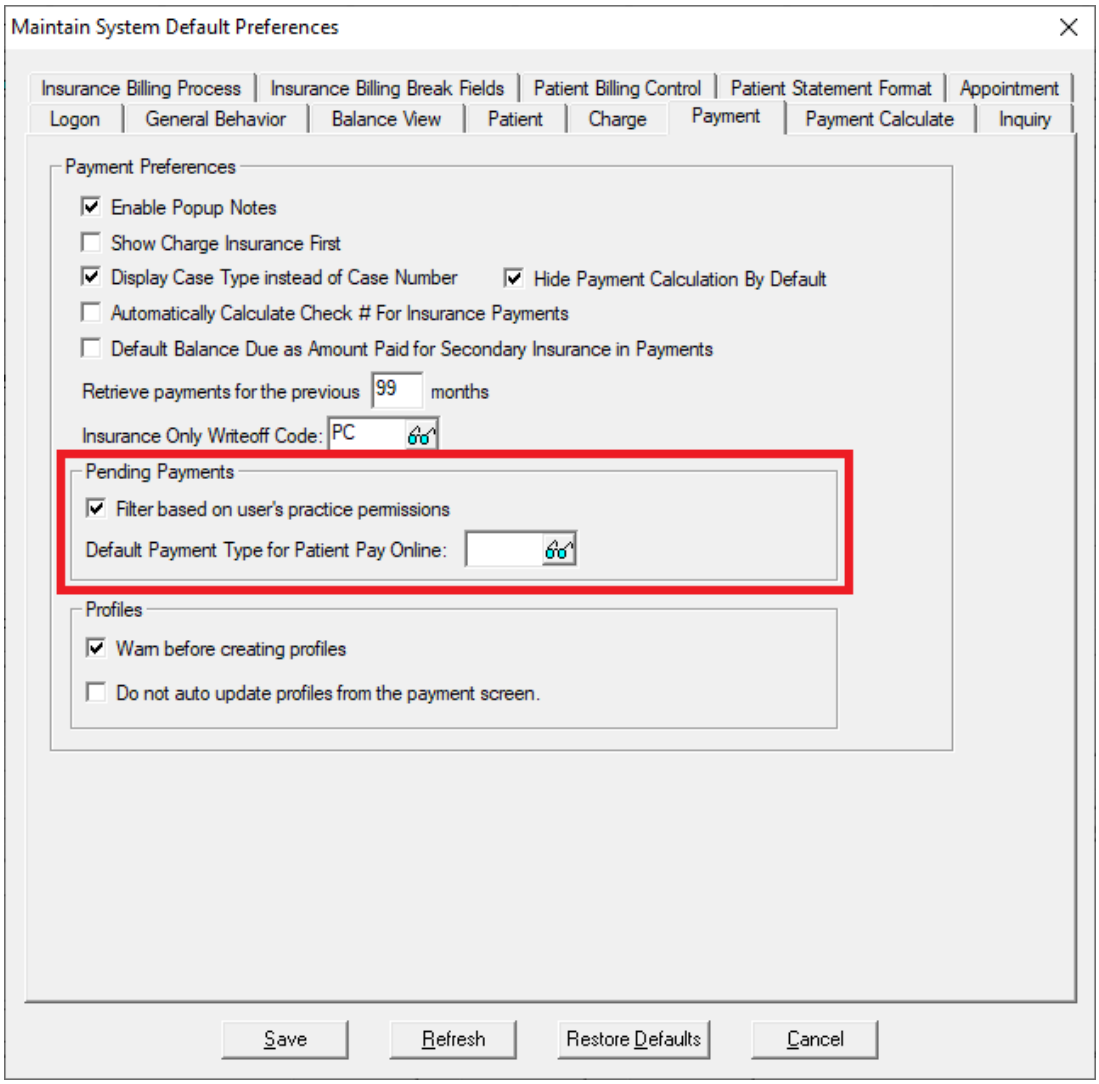


Figure 1 – Maintain System Default Preferences

- **Administration – Preferences – Practice Level Preferences –** The **Payment** tab, of the Maintain Practice Preferences dialog, has been updated with a **Pending Payments** section that contains a new **Filter based on user's practice permissions** option and a **Default Payment Type for Patient Pay Online** field. See Figure 2. The latter field was relabeled from the **Default Payment Type for InstaMed payments** field in previous versions and retains the same functionality that allows you to configure the default payment type you want to be used when posting payments from Patient Pay Online (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.

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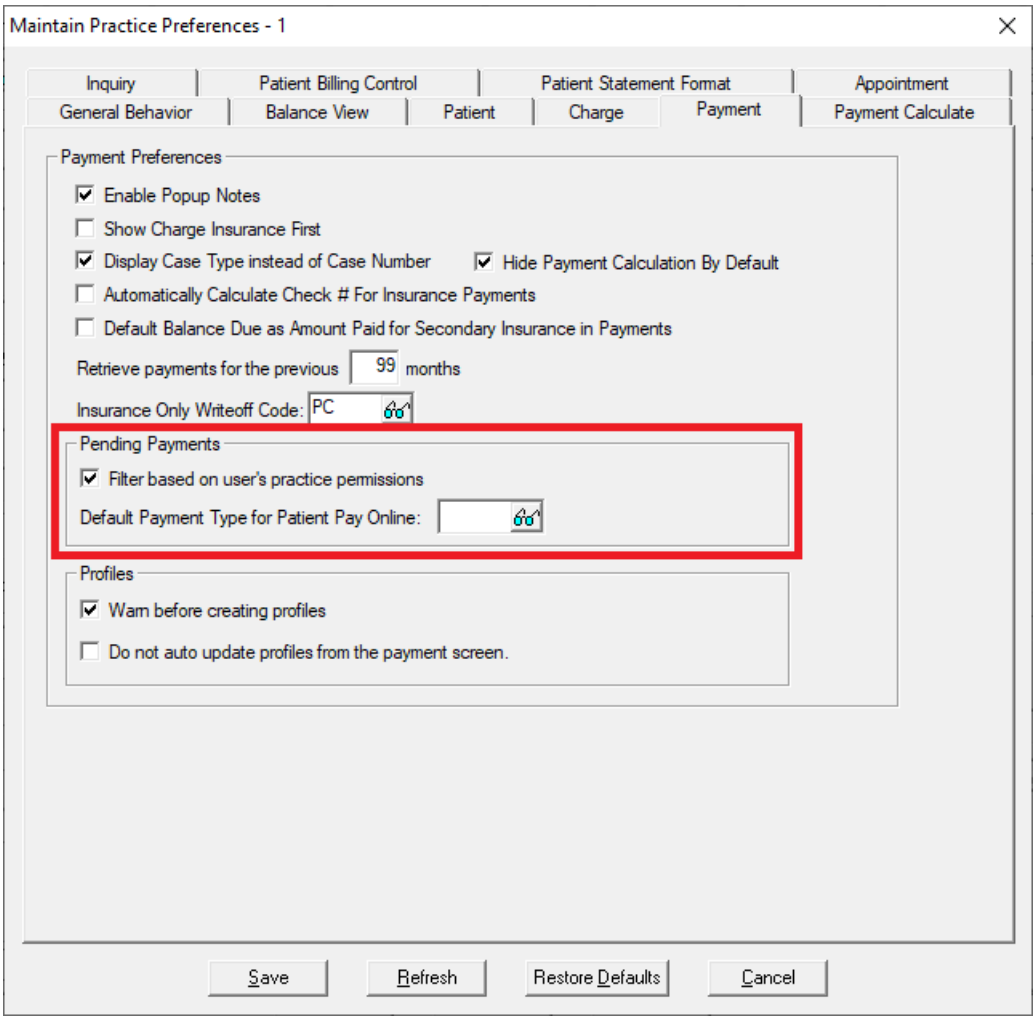


Figure 2 – Maintain Practice Preferences

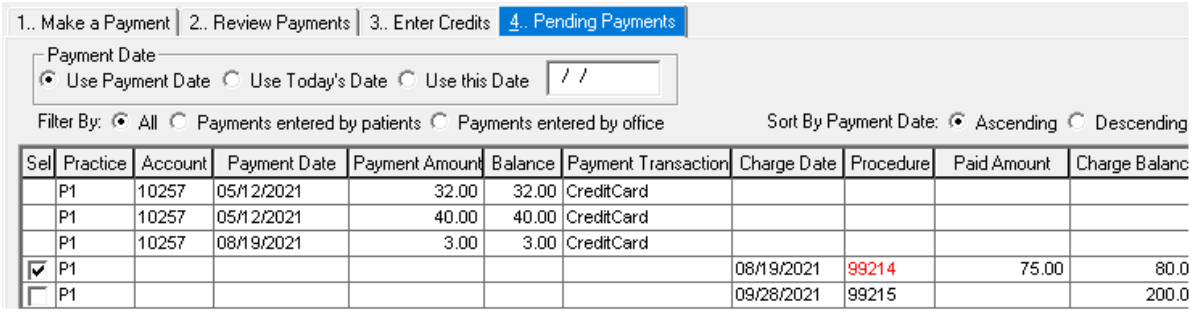
Clinical

- **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.

  * This feature was released in the CMMS 6.5.7.372 hot fix release.

Payment

- **Payment – Pending Payments –** The system has been updated to easily allow you to decipher collection charges when posting pending payments. Whenever an open charge that is in collections is associated with a pending payment, the procedure code for that open collection charge will appear in red. See Figure 3. Likewise, the bottom of the Pending Payments screen has been updated with a key indicating that **Collection charges are in red**.



Sel	Practice	Account	Payment Date	Payment Amount	Balance	Payment Transaction	Charge Date	Procedure	Paid Amount	Charge Balanc
	P1	10257	05/12/2021	32.00	32.00	CreditCard				
	P1	10257	05/12/2021	40.00	40.00	CreditCard				
	P1	10257	08/19/2021	3.00	3.00	CreditCard				
☑	P1						08/19/2021	99214	75.00	80.0
☐	P1						09/28/2021	99215		200.0

Figure 3 – Payment – Pending Payments

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