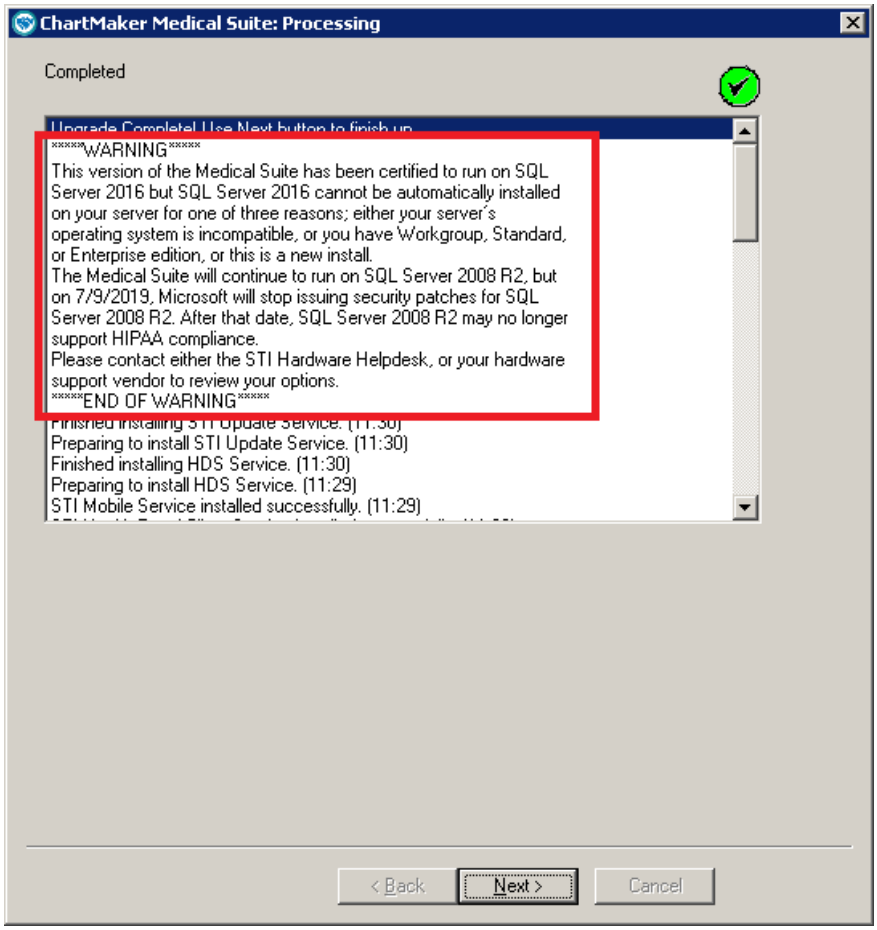
ChartMaker® Practice Manager Release Notes

ChartMaker® 2018.2 (fv6.5.9)

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 – Charge –** The **Charge Preferences** section of the **Charge** tab, in the Maintain System Default Preferences dialog, has been updated with a **Use Facility POS for Next CPT** option. See Figure 1. This preference will be unchecked by default, and if inactive (unchecked), when processing multiple pending charges for a single encounter, the system will default the Facility POS for the initial charge (if there is no Facility POS, the Procedure POS will be used), and if that POS is modified it will retain that same modified POS for the next charge processed.

  If this preference is active (checked), when processing the multiple pending charges individually (by highlighting the initial charge for the encounter in Pending Charges screen, processing the charge, then highlighting the second charge for the encounter in the Pending Charge screen, processing that charge, etc.) the POS will default to the Facility POS for the initial charge (if there is no Facility POS, the Procedure POS will be used), and then the Procedure POS will default for each subsequent pending charge processed. If this preference is active (checked), when processing multiple pending charges by using the **Select All Related Charges** button or highlighting all the pending charges you want to process in the Pending Charges screen, and then processing the charges, the system will default the Facility POS (if no Facility POS, the Procedure POS will be used), for the initial and each subsequent charge processed.

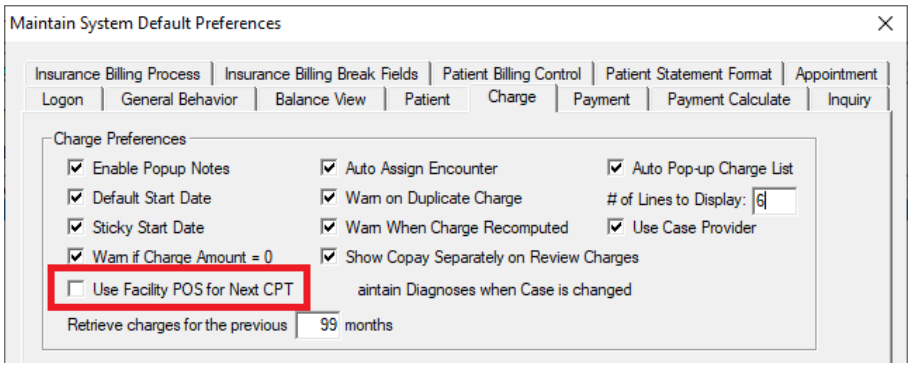


Figure 1 – Maintain System Default Preferences – Charge

- **Administration – Preferences – System Level Preferences – Payment –** The **Pending Payments** section of the **Payment** tab, in the Maintain System Default Preferences dialog, has been updated with a **Charges selected by default** option. See Figure 2. This preference will default as checked, and when active (checked) charges will be selected by default when entering the Pending Payments tab. When this preference is inactive (unchecked), the charges will not be checked when entering the Pending Payments tab and the user must select one or more of the charges to save.

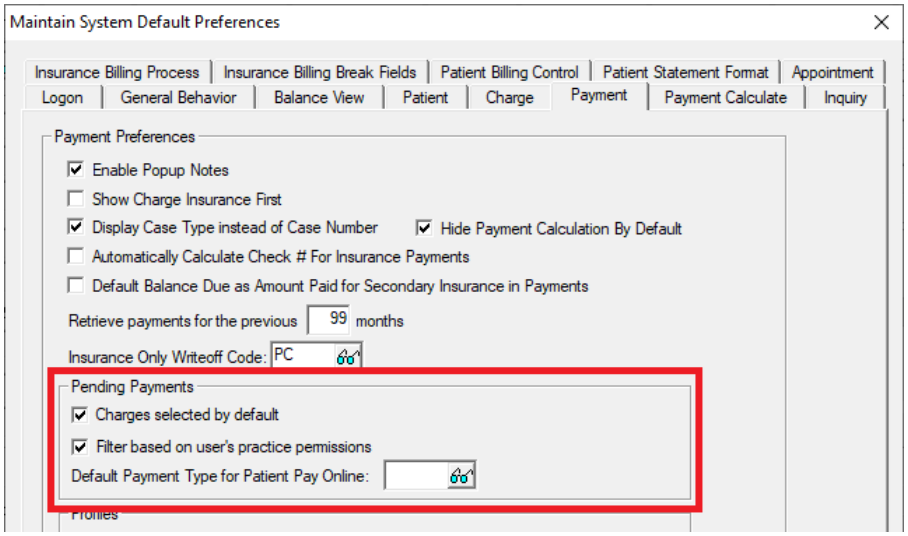


Figure 2 – Maintain System Default Preferences – Payment

- **Administration – Preferences – Practice Level Preferences – Charge** – The **Charge Preferences** section of the **Charge** tab, in the Maintain Practices Preferences dialog, has been updated with a **Use Facility POS for Next CPT** option. See Figure 3. This preference will be unchecked by default, and if inactive (unchecked), when processing multiple pending charges for a single encounter, the system will default the Facility POS for the initial charge (if there is no Facility POS, the Procedure POS will be used), and if that POS is modified it will retain that same modified POS for the next charge processed.

  If this preference is active (checked), when processing the multiple pending charges individually (by highlighting the initial charge for the encounter in Pending Charges screen, processing the charge, then highlighting the second charge for the encounter in the Pending Charge screen, processing that charge, etc.) the POS will default to the Facility POS for the initial charge (if there is no Facility POS, the Procedure POS will be used), and then the Procedure POS will default for each subsequent pending charge processed. If this preference is active (checked), when processing multiple pending charges by using the **Select All Related Charges** button or highlighting all the pending charges you want to process in the Pending Charges screen, and then processing the charges, the system will default the Facility POS (if no Facility POS, the Procedure POS will be used), for the initial and each subsequent charge processed.

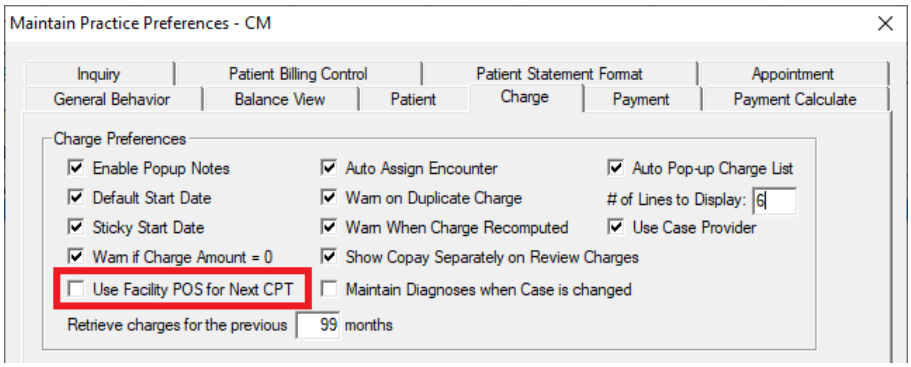


Figure 3 – Maintain Practice Preferences – Charge

- **Administration – Preferences – Practice Level Preferences –** The **Pending Payments** section of the **Payment** tab, in the Maintain Practices Preferences dialog, has been updated with a **Charges selected by default** option. See Figure 4. This preference will default as checked, and when active (checked) charges will be selected by default when entering the Pending Payments tab for the selected practice. When this preference is inactive (unchecked), the charges will not be checked when entering the Pending Payments tab for the selected practice and the user must select one or more of the charges to save.

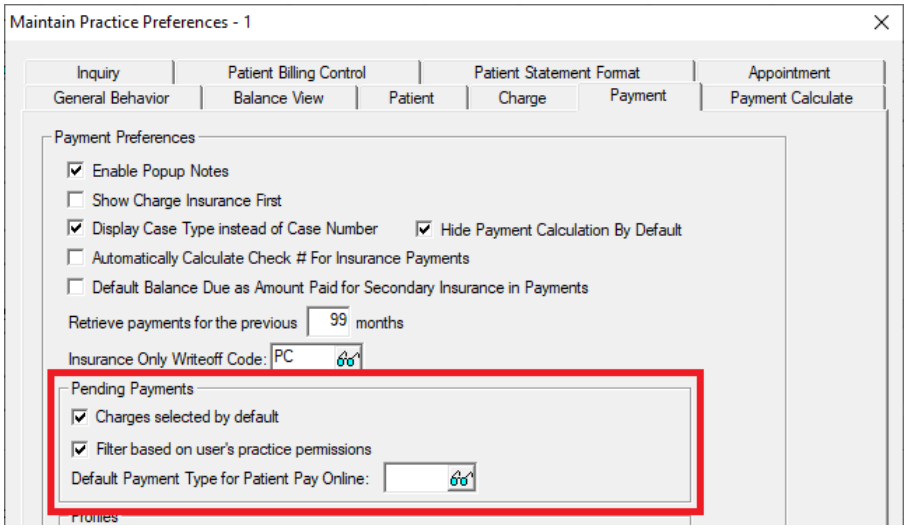


Figure 4 – Maintain Practice Preferences – Payment

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** – In previous versions, an issue could arise where the ERA viewer was not displaying a payment correctly when that payment was entered manually and an ICN, that contains spaces and/or a suffix, is entered in the Control # field without the suffix. This issue has been corrected.

Patient

- **Patient – Patient Access** – In previous versions, when registering a patient for API access, an issue could arise where the practice name was not appearing correctly in the registration email sent to the patient. This issue has been resolved. In addition, the printed and email registration message text has been updated to clarify the API use, instructions, and responsibility.

Payment

- **Payment – Pending Payments –** The Pending Payments tab has been updated with a **Deselect All**/**Select All** button allowing you to easily select all the open charges or deselect all the open charges. See Figure 5. When entering the Pending Payments tab, the button will default depending how the **Charges selected by default** option is configured, if all charges are selected the button will be toggled to Deselect All, if all charges are deselected the button will be toggled to Select All. The button will then toggle in a similar manner as the button works in the Make a Payment screen once charges are manually selected or unselected.

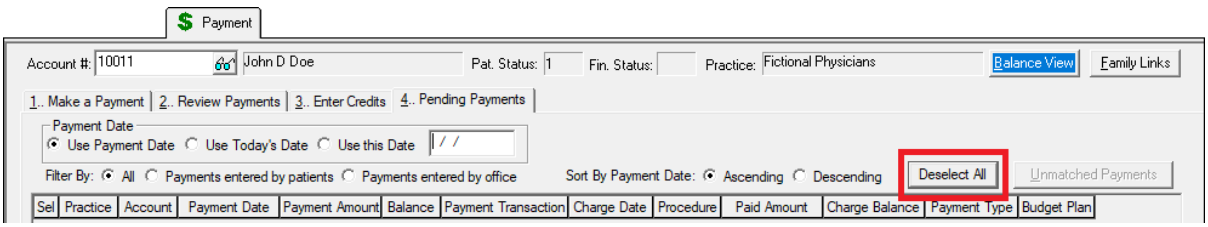


Figure 5 – Payment – Pending Payments

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