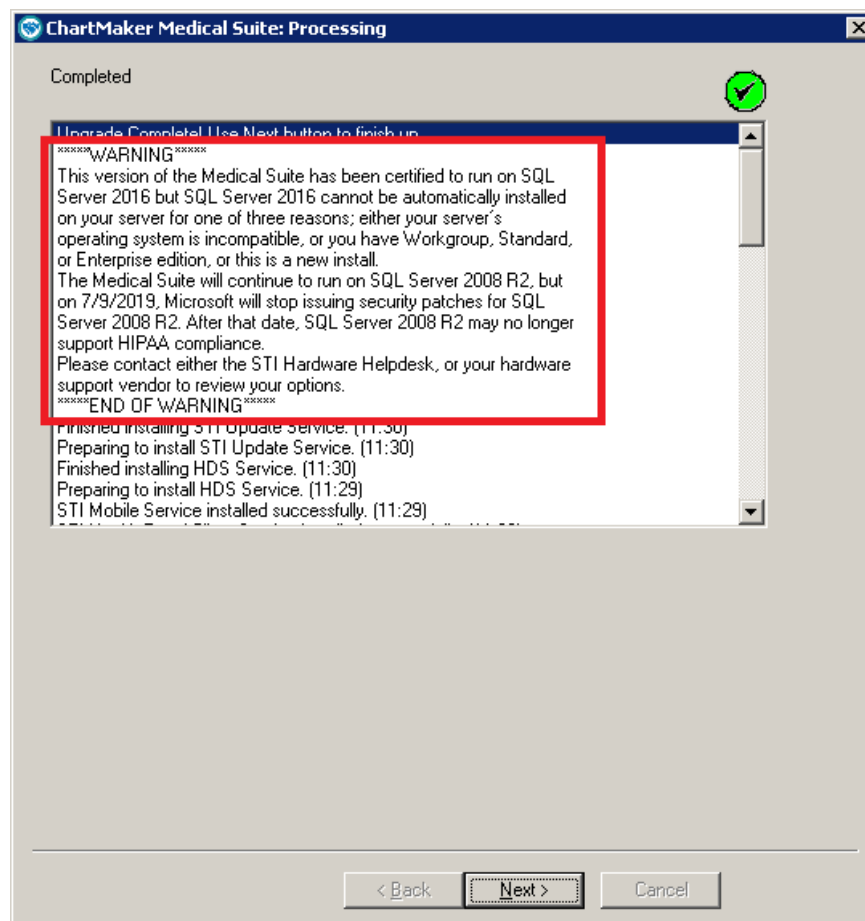


ChartMaker® Practice Manager Release Notes

ChartMaker® 2022.1 (fv6.7.0)

Important Notifications

- **Upgrade from Microsoft Server 2008/2012 and Windows 7/8** – Since January 2020, your **Windows 7/8** workstations and **Microsoft 2008 Servers** are no longer supported. Likewise, support for **Windows 8.1** will end on January 10, 2023, and support for **Windows Server 2012/2012R2** will end on October 10, 2023. 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 HIPAA 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 – Utilities – Audit – Audit Trail** – The Audit Trail has been updated to track whenever a change is made to a write off configuration for remittance (**Remittance > Configuration > Write Off**). When an audit event occurs, the Event column will display **Modified**; the Group column will display **Configuration**; the Audit Trail Description will display **Remittance Configuration - Write Off code added [or modified or removed]**; and the Metadata column will contain **Remittance Type, Group Code, Reason Code, and Penalty Code**.

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.

Insurance Billing

- **Insurance Billing – NFWC_15 – Bad Claims Report** – In previous versions, an issue could arise where charges were appearing in the Bad Claims Report for, "Attachment Control Number is needed for No Fault claims," while the claims in question did have an Attachment Control Number attached to them. This issue has been corrected.

Patient

- **Patient – Patient Access** – With the implementation of the updated ChartMaker® API, the **Patient Access** dialog has been updated to reflect the changes regarding how the patient is enabled and registered for the API. See Figure 1. To this end, the **ChartMaker® PatientPortal** section of the dialog, previously PatientPortal account settings section, contains the options to authorize the patient for the PatientPortal, as well as options to exclude unsigned results and to disable the sending of notes, labs, and scans when signing for the PatientPortal. These latter two options no longer pertain to the API, and the various warning message when these two options are selected have been updated to this end.

The **ChartMaker® API** section, previously the API Access section, has been updated to enable information about the ChartMaker® API to be sent to, or printed for, the patient. An authentication code is no longer generated. Patients will need to register for the API in the Patient ChartMaker® API Administration screen (accessed via **Chart > ChartMaker® API > Patient Administration** in Clinical). Also, the Status Legend has been updated regarding the suspended status, as it only applies to the PatientPortal now.

Patient Access

ChartMaker® PatientPortal

Registration status: Pending

Send an authorization email to the patient for ChartMaker® PatientPortal registration. [Authorize](#)

or

Print authorization instructions for the patient to manually register on the ChartMaker® PatientPortal. [Authorize](#)

☐ Do not export unsigned results

☐ Do not export on note, lab and scan signing

ChartMaker® API

☒ Enable patient to receive information about the ChartMaker® API feature

☒ Send an email to the patient

☐ Print information for the patient

Enabling the patient to receive information about this feature meets the practice reporting requirements for the 'Provide Patient Electronic Access to their Health Information' measure. If a patient wants to enroll to share their medical information with a third-party application, please go to the Chart > ChartMaker® API > Patient Administration screen to register them.

Status Legend

- - PatientPortal and API are not enabled
- - PatientPortal enabled and API is not enabled or PatientPortal not enabled and API is enabled
- - PatientPortal pending and API not enabled
- - PatientPortal is pending and API is enabled
- - PatientPortal and API are enabled
- - PatientPortal note data not being exported (suspended)

[Help](#) [OK](#)

Figure 1 – Patient Hospitalization

Patient Billing

- **Patient Statements** – In previous versions, an issue could arise when the Patient Statement Format preference of Itemized Payments is set to No, and there is a copayment split for a charge, the Patient Statement was displaying insurance payments erroneously. This issue has been corrected.

Remittance

- **Remittance – Configuration – Write Off Codes** – The New Adjustment Code Maintenance dialog has been updated so that you can no longer create an adjustment code using a Group Code of **PR**. The PR option is no longer available in the Group Code drop-down list. See Figure 2. Do note, however, that existing adjustment codes that contain a PR group code will remain. In addition, the system has been updated so that whenever a Write Off Configuration is added, edited, or removed it will be tracked in the Audit Trail.

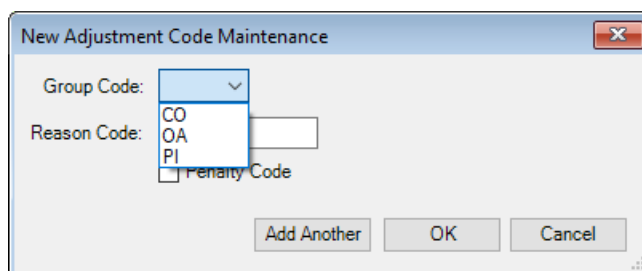


Figure 2 – New Adjustment Code Maintenance

- **Remittance – Post Remittance Payments – NEIC/NY Medicare/PA Medicare Remittance** – The system has been updated so that when processing a remittance file for NEIC, NY Medicare, and PA Medicare, whenever there is a CO-132, CO-144, CO-161, and/or OA-161 adjustment code in the EOB for the , if the amount is positive it will be posted as a write-off, and if the amount is negative it will decrease the Write-Off by the amount specified.

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