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ChartMaker[®] Practice Manager

Please note that the ChartMaker Medical Suite can no longer be installed on computers using the Windows XP or Windows 2003 Server operating system. Since Microsoft has discontinued support for Windows XP in April 2014, and Windows 2003 Server in July 2015, we can no longer guarantee the stability of computers using this operating system, and recommend that you upgrade the operating system on any computers currently using Windows XP or Windows 2003 Server.

General

System Change – SNOMED Codes – The system has been updated to use the latest (September 2016) version of the SNOMED-CT Codes and have been mapped to the applicable SNOMED categories used throughout the system.

Clinical

• **Clinical – Immunization** – The program has been updated so that the latest immunization codes from the CDC are being used when configuring immunization information.

Insurance Billing

• **Insurance Billing – Response Viewer –** The Response Viewer has been updated with the latest Remittance Advice Remark Codes and Claim Adjustment Reason Codes from CMS, allowing these codes to be displayed correctly when viewing EOBs in the Response Viewer, as well as when importing the files for the payment remittance module.

Patient

- Patient Other More Patient The More Patient Information dialog has been updated with a Previous
 First Name field, and a Previous Middle Name field, where you can view or configure any previous first
 and/or middle name that the patient may have previously had. See Figure 1. Information added or modified in
 the Previous First, Middle, and Last Name fields will be updated in the Audit Trail. Likewise, whenever a previous
 first and last name is entered, the previous name information will be included in any Transition of Care (CCDA)
 documents exported from the system.
- **Patient Other More Patient –** The **Sexual Orientation** and **Gender Identity** sections of the More Patient Information dialog have been updated so that the various orientation and identity options match the SNOMED-CT code descriptions associated with those options. See Figure 1. Likewise, when you hover over these orientation and identity options with your mouse pointer, a tool tip pop-up will display the SNOMED code associated with that option.

More Patient Information			×			
<u>1.</u> . Additional Information			4 Sexual Orientation			
Date of Death: 7 / M	Ailitary Branch: 📃 💌	Previous First Name: Jeffrey	Do you think of yourself as: (Check one.)			
Retirement Date: 7 / M	Ailitary Grade: 🗾 F	Previous Middle Name: Scott	Lesbian, gay or homosexual Straight or heterosexual Bisexual			
Signature Date: 7 / M	dilitary Status: 📃 👻	Previous Last Name: DeLynt	 Something else, please describe Don't know 			
Mother's First Name:		Nickname:	Choose not to disclose			
Mother's Last Name:		Weight: 0				
Mother's Maiden Name:		Advance Directives				
– 2 Billing Information – C	Defer Insurance Claims 🔲	Budget Amount: 0.00				
Defer Patient Bill	Start Date: 77	Charges From: 77				
Start Date: 7 7	End Date: 77	Charges Thrue 7.7	5. Gender Identity			
End Date: / /	Cycle Date: 77	Activation: 77	What is your current gender identity / [Lheck all that apply.] Identifies as Male Identifies as Female			
Last Bill:			☐ Female-to-Male (FTM)/Transgender Male/Trans Man ✓ Male-to-Female (MTF)/Transgender Female/Trans Woman			
	Address	Home Belationship	Genderqueer, neither exclusively male nor female			
Emergency Contact Pri Rachel Doe	5621 Main Stree	et (315) 488-1518 Significant Other	Choose not to disclose			
•						
Add Edit Delete						
		<u>S</u> ave <u>C</u> ancel				

Figure 1 – Patient – More Patient Information

Reports

Managed Care Reports

• Encounter Analysis → Summary – This report has been updated with the ability to sort and select by Case Close Date, Case Open Date, and Patient Status.

Addendum

Insurance Billing Updates Reminder

In the version 4.1 release of Practice Manager, there was an important enhancement that was made to the Insurance Billing screen to alert you whenever a new insurance billing update is available. Once alerted you can then download these updated billing components at your convenience. **Do note that if you are running the 4.1 version of Practice Manager, the update process needs to be performed on the server.**

In the version 4.2 release of Practice Manager, the system was updated so that billing components reside on each individual workstation. Therefore, if you are running the 4.2 version or higher of Practice Manager, the update process (described below) will need to be initiated for each workstation that will be doing insurance billing. If the updates are not downloaded and registered on each workstation that will be doing insurance billing, then claims generated for those workstations may be denied if they are not updated.

• **Insurance Billing Updates** – The Insurance Billing tab has been updated with an Update button that allows you to download the latest insurance billing components if new components are available. See Figure A1. An Update button is available in both the Manual Billing and Automatic Billing sub-tabs and will become highlighted to alert you when new billing components are available.

	🍪 Insurance Billing					
Manual Billing Automatic Billing						
Billing Forms Practices and Providers						
Mode Form	Description	E Central Me	dical Associates (1)			
Paper CMSBSPA	CMS1500 for BSPA (N)					
Paper CMSIBC	CMS1500 for PA IBC Product Line (N)					
Paper CMS1500	CMS1500 Red Form (N)					
Paper HPARTPPA	A Health Partners Philadelpha, PA (N)					
Paper MCDPPA	PA Medicaid (CMS1500)(N)					
Paper MCRPPA	Pennsylvania Medicare (N)					
Electronic DEMLD_PS	 Delaware Medicaid Prof.837 (ANSI 5010 A1) Member J Medicaid Prof. 027 (ANSI 5010 A1) 					
Electronic MDMCD_P	NEIC AVERMEND Prof 927 (ANSI 2010 A1)					
	Electronic NEL_F4 NEL(WEDMD)F076337 (ANSI 4010 A1)					
Electronic NJMCD P5	Electronic NURCPS New Jerse Medicaid Prof.837 (ANSI 5010.41)					
Electronic PABSKA_P	Electronic PABSKA P4 PA BS Keystone/AmeriAalth P106/837 (AN1341)					
Electronic PABSKA_P	lectronic PABSKA_P5 PA BS Keystone/AmeriHealth Prof.837 (ANSI 5010 A1)					
Electronic PABS_P4	Pennsylvania Blue Shield Prof.837 (ANSI 4010 A1) 🛛 🤎					
A DADO DE	Demonstration Diversibility Des (0007 (AMC) E010 A1)					
			,,			
Select <u>All</u> Deselect All			Seject All Deselect All			
Batch Run Options		Results				
Dist Frances Departs after anti-		Charle Times	End These			
Print Forms or Heports after gathering claims		Start Lime:	End lime:			
Create An Electronic Test File Test Claims: 25		Good Charges:	\$			
Description	Description		\$			
Advanced Selections						
Statue						
Jordino.						
				Erint/Send Batch		

Figure A1 – Insurance Billing – Manual Billing

Once the download is initiated by clicking the **Updates** button, another dialog will appear confirming that you want to download and install the latest billing updates. See Figure A2.



Figure A2 – Insurance Billing Updates Download

Insurance Billing Updates Reminder (continued)

Once the **Yes** button is clicked the insurance billing updates will start to download and the following message will appear in Figure A3. Do note that once the billing updates are initiated by a user, the Updates button will disable for all users and other users who try to initiate the download will receive a message stating that updates have started from another machine. Once the updates have been downloaded you will be prompted to install the updates, as well as to close out of the Practice Manager application to ensure a successful update.



Figure A3– Insurance Billing Updates Download Confirmation

Once the updates have been successfully downloaded and installed, log back into Practice Manager and be sure to register the Billing Component Manger (Add-Ins > Insurance Billing > Billing Component Manager).

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