

# Medisoft 21

New Install for Version 21



December 2016

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Medisoft®

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# Chapter 1 - Medisoft Clinical Installation Overview

In this chapter you will find listings of the supported operating systems for Medisoft Clinical, as well as the minimum system requirements for your computers.

# Medisoft 21 Supported Operating Systems

**NOTE:** Medisoft 21 is a 32-Bit application, and on a supported 64-Bit platform, the application will run in a 32-Bit mode.

OPERATING SYSTEM	SERVER		WORKSTATION	
	Version of Medisoft 21		Version of Medisoft 21	
	Network Professional	Single-User or Advanced	Network Professional	Single-User or Advanced
Windows Server 2012 and 2008 32-Bit	Y	N/A	Y	N/A
Windows Server 2012 and 2008 R2 64-Bit	Y	N/A	Y	N/A
Windows 10	Y	Y	Y	Y
Windows 7 Professional 32-Bit Windows 8 Professional 32-Bit	Y	Y	Y	Y
Windows 7 Professional 64-Bit Windows 8 Professional 64-Bit	Y	Y	Y	Y
Windows 7 Ultimate 32-Bit	Y	Y	Y	Y
Windows 7 Ultimate 64-Bit	Y	Y	Y	Y

## Medisoft Clinical Supported Operating Systems

OPERATING SYSTEM	SERVER	WORKSTATION	DATABASE
	Version of Medisoft 21	Version of Medisoft 21	Version of c-tree Server
	Medisoft Clinical with Medisoft Network Professional	Medisoft Clinical with Medisoft Network Professional	c-tree Server 7.12 Standard
Windows 2008 32-Bit or 64-Bit	Y*	N/A	Y
Windows Server 2008 R2 64-Bit (See note above)		N/A	
Windows Server 2012	Y		Y**
Windows 7 Professional 32-Bit		Y	
Windows 8 Professional or Enterprise 32-Bit	N/A	Y	NA
Windows 7 Professional 64-Bit		Y***	
Windows 8 Professional or Enterprise 64-Bit	N/A		NA
Windows 7 Ultimate 32-Bit	N/A	Y	NA
Windows 7 Ultimate 64-Bit	N/A	Y***	NA

Medisoft Clinical requires a domain/Active Directory infrastructure.

Each Medisoft Clinical user must have a unique Windows/domain username for security reasons.

\* Medisoft Clinical does not support the Remote Application feature in Windows Server 2008 64-Bit.

\*\* When running Medisoft Clinical with Windows Server 2008, you must turn off the Windows UAC feature (requirement of c-tree Server).

\*\*\*EKG and Spirometry, as well as all Midmark, devices are not supported on 64-Bit computer. Currently, only Welch Allyn EKG is supported.

Medisoft will not support Windows RT on the ARM processor.

# Medisoft Clinical Hardware and Software Requirements

## Workstation

CPU (Processor)	Intel Core 2 Duo 1.6GHz
RAM (Memory)	4GB for Windows 8 Professional or Enterprise or Windows 7
Network Card (NIC)	100 Mbps
Video Resolution	1024x768 (1280x800 for widescreen displays)

Note: You must have an Internet connection to use Medisoft Clinical.

## Application Server

CPU (Processor)	Intel Dual Core Xeon 1.6GHz
RAM (Memory)	8GB
Storage Array Type	RAID-1
Optical Drive	DVD-ROM
Network Card (NIC)	1Gbps

Advantage Database Server 11.10 is required for Medisoft 21. eMDs recommends that if you have a 64-bit computer, use 64-bit Advantage.

In addition, several guides for using Medisoft Clinical are available on your Medisoft Clinical installation DVD. You can access them from the DVD or insert the DVD and start Autorun.

You no longer need to disable SMB2. This is disabled as part of the Medisoft Clinical installation.

## Encoder Pro

Medisoft Clinical 21 requires Encoder Pro 7.3.

## Mobile

Mobile is available only with Medisoft Network Professional.

## Supported Mobile Devices

The following mobile devices are supported:

- iPad
- Android Tablet



The Patient Intake feature is supported on iPad's with display dimensions of 9.5 inches or greater. Android Tablet's with Display dimensions of 10 inches or greater.

## Supported Operating Systems

The following operating systems are supported:

### Apple Operating Systems

- iOS7
- iOS8
- iOS9

### Android Operating Systems

- Jelly Bean
- Kit Kat

# McKesson Practice Interface Center

## Hardware requirements

CPU (Processor)	Equivalent of Intel Quad Core Xeon 1.6GHz
RAM (Memory)	8GB
Storage Array Type	RAID-1
Optical Drive	DVD-ROM
Network Card (NIC)	1Gbps (cannot be a teamed network card)
Hard Drive	At least 30GB

## Software requirements

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eMDs recommends that you install it on the same computer as your Advantage Database Server. It does not need to be installed on any of your workstations. Nor does it have to be dedicated.

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You may use a virtual server with MPIC.

### With Practice Partner 9.5.2.2

- Windows Server 2008 R2 32 or 64-bit
- Windows Server 2012
- Medisoft 18 or higher

### With Practice Partner 11.0

- Windows Server 2008 R2 32 or 64-bit
- Windows Server 2012
- Medisoft 19 SP1 or higher

### With Practice Choice EMR and eRX

- Windows Server 2008 R2 32 or 64-bit
- Windows Server 2012
- Medisoft 18 or higher

## Limiting User Access to Medisoft Clinical Programs

Medical Billing for Windows, Patient Records, Appointment Scheduler, Order Entry, and Code Wizard are all licensed separately. If you purchased a limited number of licenses, you can limit who has access to the applications to avoid running out of licenses. For example, if you have ten Appointment Scheduler licenses and 20 Patient Records licenses, if you give access to both applications to everyone, only ten people will be able to log onto Patient Records since they will be limited by the Appointment Scheduler licenses.

Look at the General tab on the Access Level Configuration screen. You will see “Hide AS except Provider Schedule?,” “Hide PR?,” and “Hide Orders?” When all three items are left clear for an access level, a user assigned with this access level will use a Patient Records user license, an Appointment Scheduler user license, and an Order Entry license.

You can configure a user’s access to Medisoft Clinical applications by selecting and clearing the appropriate access level items. For example, if you want the user to access only Appointment Scheduler, select the Access cells for the “Hide PR?” and “Hide Orders?” items, and clear the “Allow access to MB” item. Only the Appointment Scheduler user license will be used.

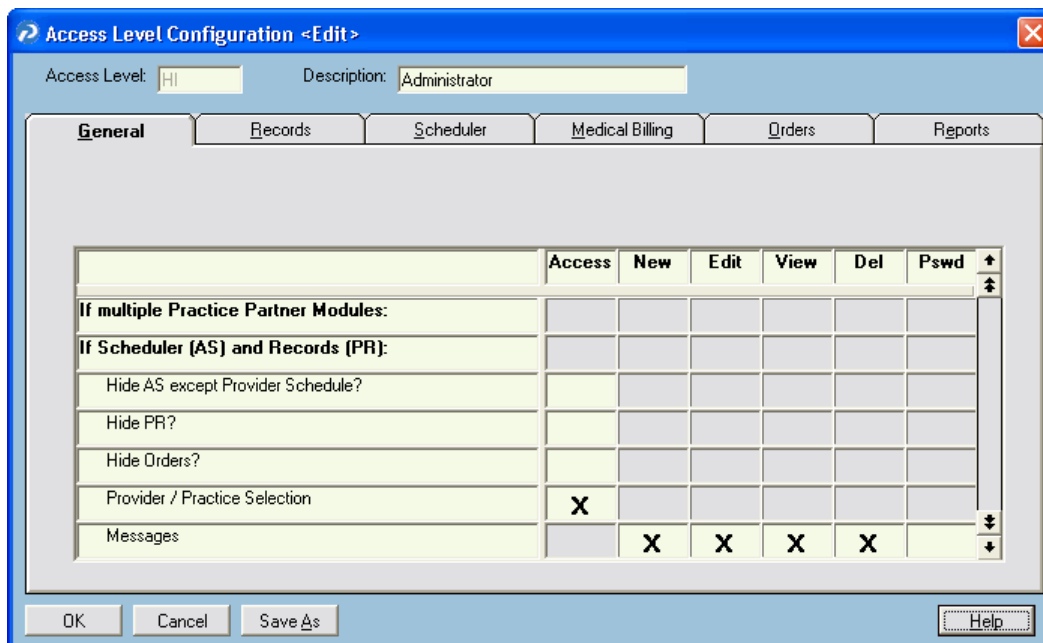


Figure 1. Access Level Configuration <Edit> screen

# Installation Overview

The following steps overview the process for installing and synchronizing data between Medisoft and Medisoft Clinical.

Step	Process
1	Set up your network and computers.
2	Install the Advantage Database Server, Medisoft Clinical Server, and CTree Server on a PC configured as a server. The instructions for these tasks are detailed in this document. See <a href="#">“Installing on the Server” on page 12.</a>
3	Install the Medisoft Network Professional Client, Office Hours Professional for Networks, and Medisoft Clinical Client. The instructions for these tasks are detailed in this document beginning at <a href="#">“Installing Medisoft on Client Workstations” on page 17.</a>
4	Launch Medisoft Network Professional and register your software.
5	Configure your connection to Medisoft Clinical, sending data for synchronization, and opening Medisoft Clinical Client and receiving synchronized data. The instructions for these tasks are detailed in this document beginning at <a href="#">“Linking Medisoft with Medisoft Clinical” on page 23.</a>
6	Review your after-installation options, detailed in this document beginning at <a href="#">“After Installing Medisoft Clinical ” on page 25.</a>

# Chapter 2 - Installing Medisoft Clinical

In this chapter you will learn how to install Medisoft Clinical on your server and workstation computers. These instructions include several sections for preparing your computers and files for installation, as well as for installing McKesson Practice Interface Center, a program that can enable Medisoft to communicate with Medisoft Clinical.

You must have administrative privileges to complete the installation.

If you are extracting the ISO or webinstall file to the hard drive prior to installing, extract to a folder that is immediately off the root drive and the folder name must be short. For example, c:\Install. Do NOT use a long folder name. eMDs recommends this for both server and workstation installs.

## Pre-installation Setup

- Date and time synchronization between the server and client PCs. The Windows Time Service is a feature of Windows operating systems that maintains date and time synchronization on all clients and servers in a network, using the Simple Network Time Protocol (SNTP). It is standard practice for all Medisoft Clinical customers to use this feature to maintain time and date synchronization of all computers in your network. Medisoft Clinical will use this synchronized date and time to the date/time of events, including audit trail entries. To synchronize your client workstations to your server, run the following command line prompt on your client workstations: Net Time \servername/set/y where [servername] is the name of your server.
- For WTS and Citrix sites: If you are using Windows Terminal Services (WTS) or Citrix, run the installation through the Control Panel's Add/Remove Programs wizard. This will enable you to select which Medisoft Clinical program files are allowed to be accessed by multiple sessions.
- Turn off Windows Firewall.

Follow the steps below to set up your server and network for Medisoft Clinical.

## Server Setup

1. Designate a computer as the server. Use this server for storing your data.
2. Set up a drive on the server with a drive letter (typically P:).
3. Create a folder on this drive for the Medisoft Clinical files (typically Ppart).
4. Share this folder, giving all users Full Permission.

To share the root data folder:

- a. Open Windows Explorer and select the root data folder.
- b. Click **Sharing and Security**.
- c. On the **Sharing** tab, click **Share this folder**, and click **Permission**.

- d. Select **Full Control**.
  - e. Click the **OK** button.
  - f. Click the **OK** button.
5. Turn off virus scanning on this drive.
  6. Create a folder for the root data path (that is, Medidata).
  7. Share the root data folder. You **MUST** remember the name of this directory as you will need it later in the installation.
  8. When installing the client workstations, map the shared drive to the local machine as the same drive letter it was installed on. For example, if you selected P:\ppart as the drive and folder during the server installation, the workstation must have a mapped drive with the designation of P:\ pointed at the root of the P:\ drive on the server. This will allow the client workstation to see the \ppart folder on the P:\ drive.

## Download your License File

### To download your license file:

1. Go to the McKesson Practice Support website at <https://practicesupport.mckesson.com>.

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If you have never created an account at this site, you must do so first. Click the Create a User Account link and follow the steps. Make sure you enter the correct information when creating your account.

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2. Enter your McKesson Practice Support website username and password.
3. Click the **Login** button.
4. Under **Quick Links** on the left side of the McKesson Practice Support website, click the **Downloads & License Files** link.
5. On the Product Downloads and License Files page, select the product for which you want to request the license. The Product Information page appears.
6. Click the **Request a license file for installation** link.
7. Your license files are e-mailed to you within a few minutes. The e-mail provides instructions for installing the license files.

## Installing your License file for Medisoft Clinical/Practice Partner

1. Create a License folder on the P:\ drive (or whatever drive the Practice Partner folder is on).
2. To create a License folder:
  - a. Open Windows Explorer.
  - b. Browse to the P:\ drive (or whatever drive the Practice Partner folder is on).
  - c. Create a new folder by right-clicking a blank area in a folder window or on the desktop, pointing to **New**, and then clicking **Folder**.
  - d. Rename the default folder to **License**, and then press **Enter**.

3. Save the file attached to the email into the License folder. One of the files will be named "pplic.txt". If this file doesn't exist (because some Email programs strip this file), save the other file in the License folder and rename it to "pplic.txt".

## Disable Windows Firewall

1. Click **Start** on the Windows Desktop.
2. Click **Control Panel**. The Control Panel appears.
3. Click **System and Security**.
4. Click **Windows Firewall**.
5. Click **Turn Windows Firewall on or off**. The Customize Settings screen appears.
6. Select the options to turn off Windows Firewall.
7. Click the **OK** button.

Do not forget to enable Windows Firewall when the installation is complete.

## Disable DEP (Data Execution Protection)

1. Click **Start** on the Windows Desktop.
2. Click **Control Panel**. The Control Panel appears.
3. Click **System and Security**.
4. Click **System**.
5. Click **Advanced System Settings**.  
If you are prompted for an administrator password or confirmation, type the password or provide confirmation.
6. Under Performance, click **Settings**.
7. Click the **Data Execution Prevention** tab
8. Select Turn off DEP for all programs and services except those I select.
9. Click the **OK** button.
10. Click the **OK** button.
11. Close **Control Panel**.

Do not forget to enable DEP after the installation is complete.

# Installing on the Server

Follow these instructions to install Medisoft Clinical on your server.

1. Insert the Medisoft Clinical DVD in the server drive. The Installation screen appears.
2. On the Autorun screen, click the **Install Medisoft Clinical** link. The Welcome screen appears.
3. Click the **Next** button. If the Beta Agreement screen appears, click the **Next** button. The End User License Agreement screen appears.
4. Select the **I accept the agreement** button.
5. Click the **Next** button. The Select Medisoft Clinical Components to Install screen appears.
6. Select the server component boxes including **Advantage Database Server V11.10**, **Medisoft Clinical Server**, and **CTree Server V7**. Define these options on the server computer.

**OPTION:** select the other available boxes to install these options on the server: Medisoft Client, Office Hours Pro, and Medisoft Clinical Client. Select these options at this time only if you plan to use the server as a workstation to enter data such as appointments, patient information, encounters, and so on.

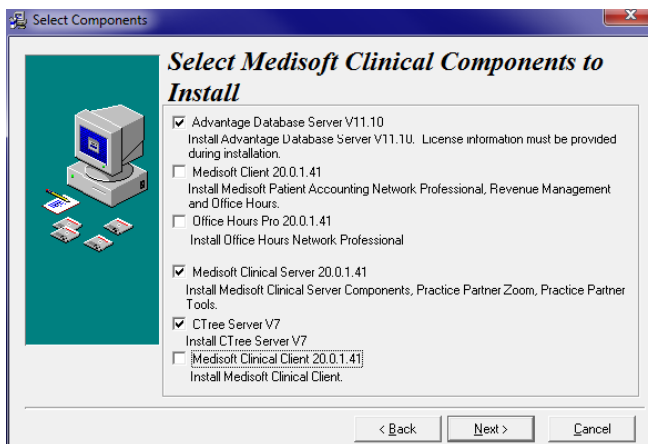


Figure 2. Select Components screen

7. Click the **Next** button. The Select Options Installation screen appears.

**Advantage Database Server:** This is the database that Medisoft uses for its data.

**Medisoft Client:** This is the Medisoft application that handles billing.

**Office Hours Pro:** This application handles appointments for patients.

**Medisoft Clinical Server:** This application is the Medisoft Clinical software for the server.

**CTree Server:** this is the database used by Medisoft Clinical server.

**Medisoft Clinical Client:** This is the Medisoft Clinical software installed on client computers.



## 8. Enter the information for your Advantage license.

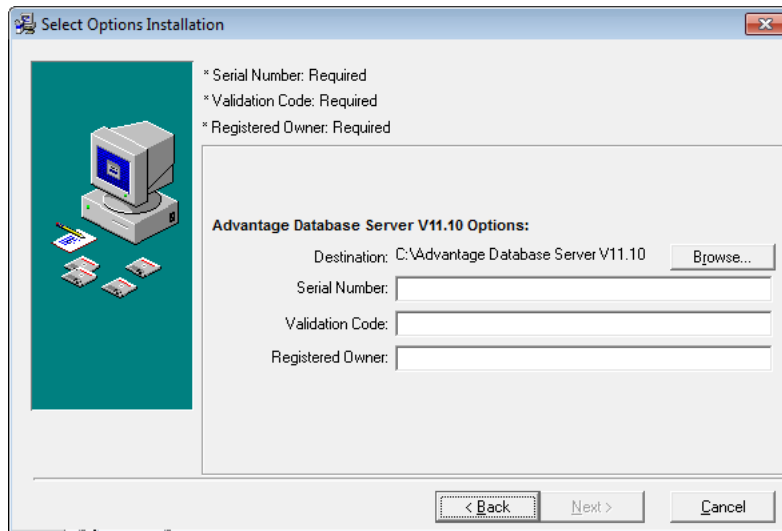


Figure 3. Select Options Installation screen

eMDs recommends that you do not put any spaces in the Registered Owner field.

If you selected the Medisoft Client check box, the Select Components screen appears. If needed, select Tutorial Files and Final Draft check boxes to install these components and click the **Next** button. The Subscription Agreement screen appears.

Depending on your selections here, you may or may not see all of the screens listed below. This procedure assumes you selected all boxes except Medisoft Clinical Client.

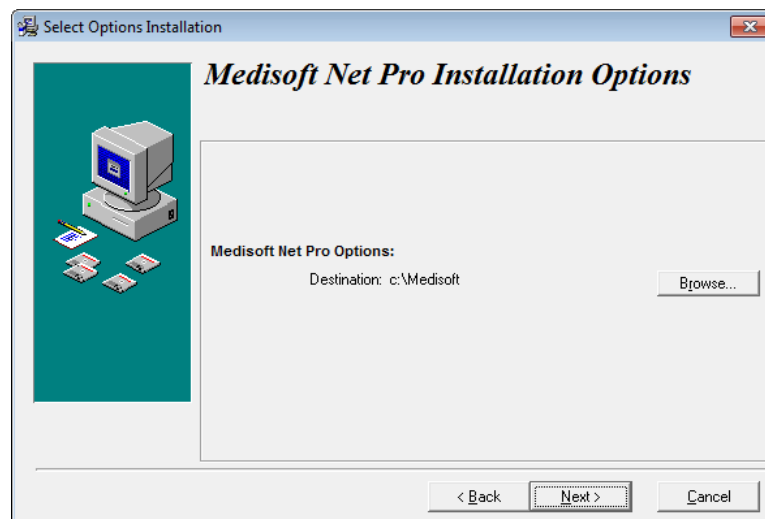
9. Click the **Next** button. The Medisoft Net Pro Installation Options screen appears.

Figure 4. Select Options Installation screen

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**NOTE:** On 64 bit computers, the default path is C:\Program Files (x86)\Medisoft.

---

10. Click the **Next** button. The Select Options Installation screen appears. The folder listed must exist before you can continue. For a new install, it must be empty.

**WARNING:** Do not rename or move the directory after the installation. This directory is used to register Medisoft Clinical files, and the program may fail to work if the directory name is changed.

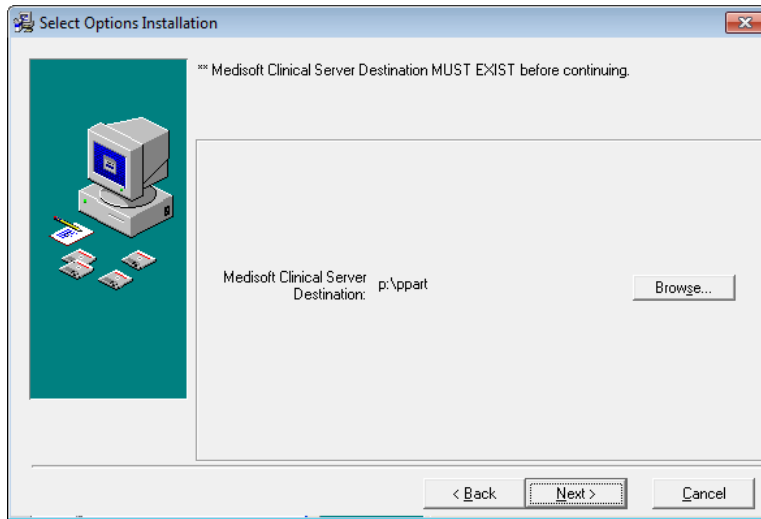


Figure 5. Select Options Installation screen

11. Click the **Next** button. The Select Destination Directory screen appears.
12. Enter a Password for your CTree Server. Accept the default or click **Browse** to select a different location for the CTree Server files.

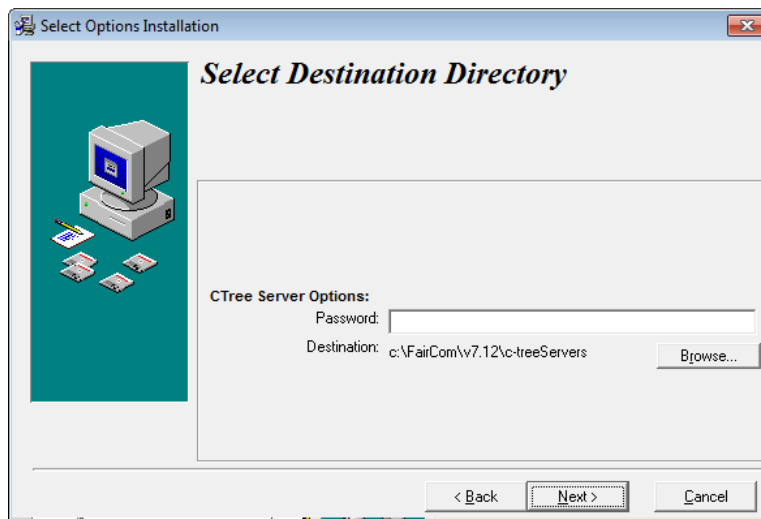


Figure 6. Select Destination Directory

13. Click the **Next** button. The Medisoft Clinical Basic Options screen appears.
14. Enter a name for the admin user, as well as a password. You will use this account and password to login to Medisoft Clinical after you complete the installation.

For security reasons, your password must be between 8 and 16 characters in length and consist of a combination of letters and at least one number and one non-alphanumeric

character. Your password cannot be the same as your user name. The default value shown below is the recommended password.

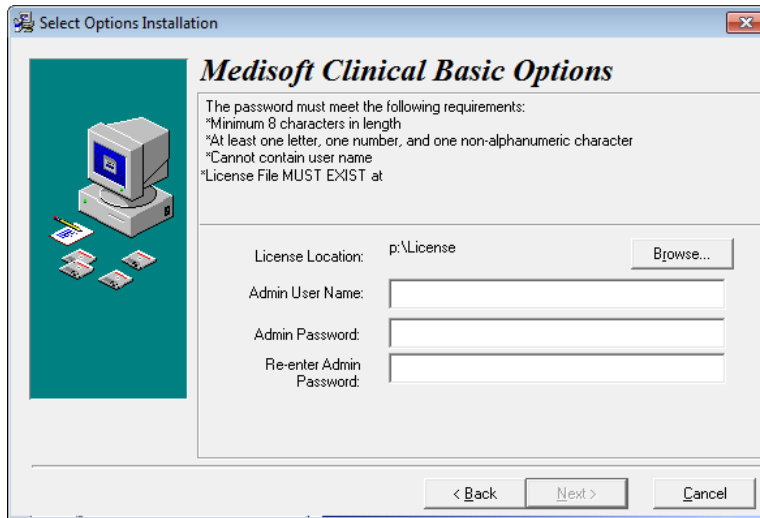


Figure 7. Medisoft Clinical Base Options screen

15. Click the **Next** button. The Ready to Install screen appears.
16. Click the **Next** button. The installation starts. The FairCom Server Activation Utility screen appears. On the FairCom Server Activation Utility screen, enter the last six digits of your CTree serial number in the Serial Number field and enter your Activation Key in the Activation Key field.

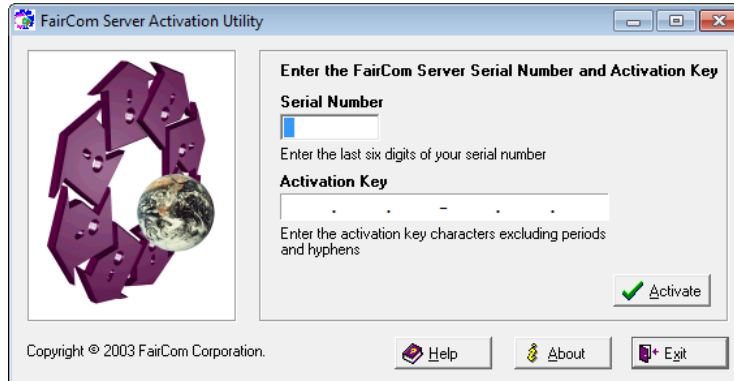


Figure 8. FairCom Server Activation Utility screen

17. Click the **Activate** button. The Information screen appears.

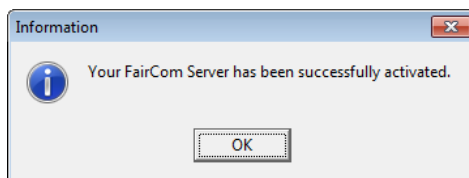


Figure 9. Information screen

18. Click the **OK** button.
19. Click the **OK** button. The screen closes and the installation finishes.

20. Install any Medisoft Clinical Add-Ons that you want to install. For more information on Add-Ons, see [“Add-Ons” on page 37](#).
21. After you complete the upgrade of Medisoft Clinical and any Add-Ons, run the Patch Updater Utility to install patches to Practice Partner. Instructions for using this utility are available on your Medisoft Clinical DVD via the autorun.exe program. Start Autorun and select *Patch Download/Installation*.

To launch the Update Utility:

- a. Open Windows Explorer and navigate to P:\ppart\Updater.
- b. Double click PMSI.Installer.Updater.Manager.exe.
- c. Follow the steps in the Updater to complete downloading and installing the patches.

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# Installing Medisoft on Client Workstations

## Workstation Setup

Before installing the Medisoft Clinical Client on a workstation, you will need to:

1. Map a drive on the workstation to the directory on the server. Select the drive letter where the directory is for the drive letter on the client PC. If the client PC is not mapped to the physical drive on the server with the map drive on the client PC using the correct name, the installation will fail.
2. Make sure all users have full access rights to the server: drive and the folder, as well as the User directory (usually c:\Documents & Settings\All Users\Application Data\Medisoft), or you may receive errors when you start Medisoft.
3. Make sure all users are in the same workgroup or domain.

If you have questions about mapping to the server drive and directory, workgroups, or domains, consult your network administrator.

## Installing on your Workstation

1. Disable UAC (User Account Control) prior to installing on each workstation.
2. Reboot the computer if necessary.
3. Insert the Medisoft Clinical DVD in the client drive. The Autorun screen appears.

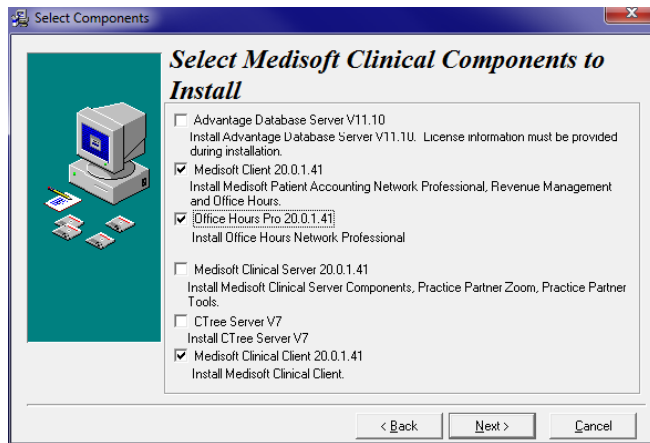
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NOTE: eMDs recommends that you do NOT attempt to install using any of the programs with the extension \*.msi, such as setup.msi. Doing so may result in failure of the installation. Always use autorun.exe.

---

4. Click **Install Medisoft Clinical**. The Welcome screen appears.
5. Click the **Next** button. If the Beta Agreement screen appears, click the **Next** button.
6. The End User License Agreement appears. Click the **I Accept the agreement** button.
7. Click the **Next** button. The Select Medisoft Clinical Components to Install screen appears.
8. Select the **Medisoft Client** check box and select the **Medisoft Clinical Client** check box.

**Option:** if you purchased Office Hours Professional for Networks, select the **Office Hours Pro** check box.



**Advantage Database Server:** This is the database that Medisoft uses for its data.

**Medisoft Client:** This is the Medisoft application that handles billing.

**Office Hours Pro:** This application handles appointments for patients.

**Medisoft Clinical Server:** This application is the Medisoft Clinical software for the server.

**CTree Server:** this is the database used by Medisoft Clinical server.

**Medisoft Clinical Client:** This is the Medisoft Clinical software installed on client computers.

Figure 10. Select Components to Install screen

Depending on the options you select here, the installation steps below might change.

9. Click the **Next** button. The Subscription Agreement screen appears.
10. Click the **I accept the agreement** button.
11. Click the **Next** button. The Select Components screen appears.
12. Select available boxes to install the options including, Tutorial Files and Final Draft.
  - The Tutorial Files option will load sample data that you can use to learn about Medisoft Clinical.
  - Final Draft is a word processing program that can pull data from the Medisoft patient accounting program into documents prepared in Final Draft. You can use this feature to enter patient notes and narratives as well as letters and other documents necessary for the practice.

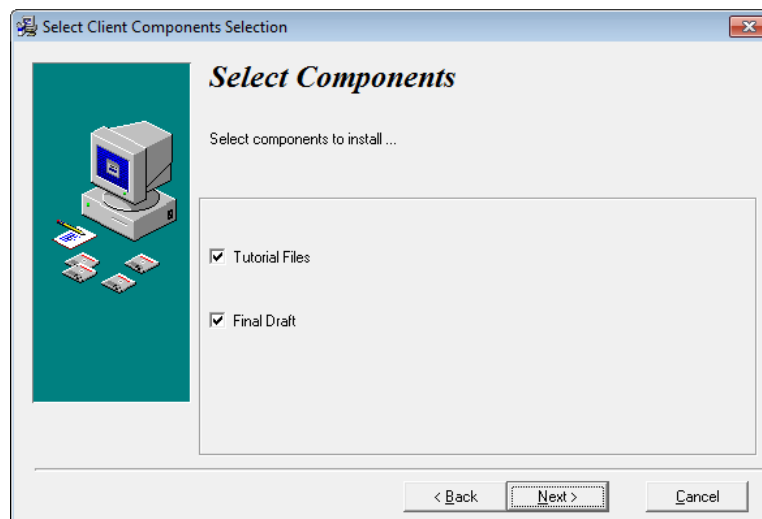


Figure 11. Select Components screen

13. Click the **Next** button. The Medisoft Net Pro Installation Options screen appears.
14. Accept the default or click Browse and select a different directory.

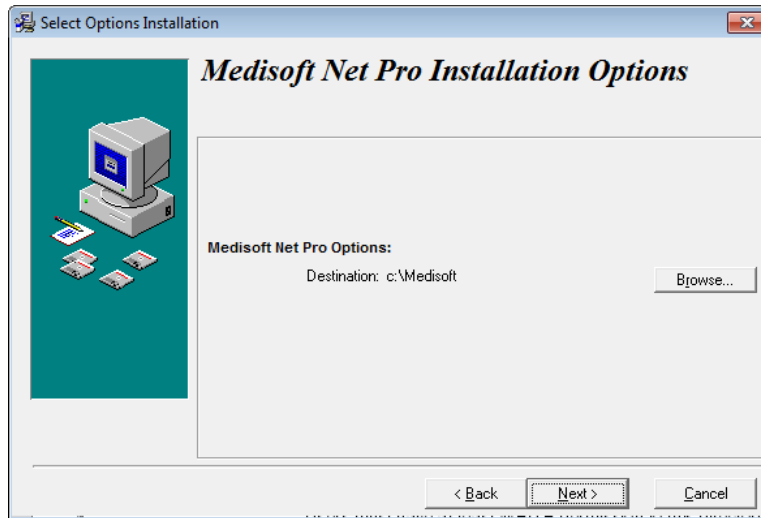


Figure 12. Medisoft Net Pro Installation Options screen

On 64 bit computers, the default path is C:\Program Files (x86)\Medisoft.

15. Click the **Next** button. Accept the default or click **Browse** to select a different location for the Medisoft Clinical Server Destination.  
Users must have at least WRITE permission to this directory, as well as the User directory (usually c:\Documents & Settings\All Users\Application Data\Medisoft), or you may receive errors when you start Medisoft.

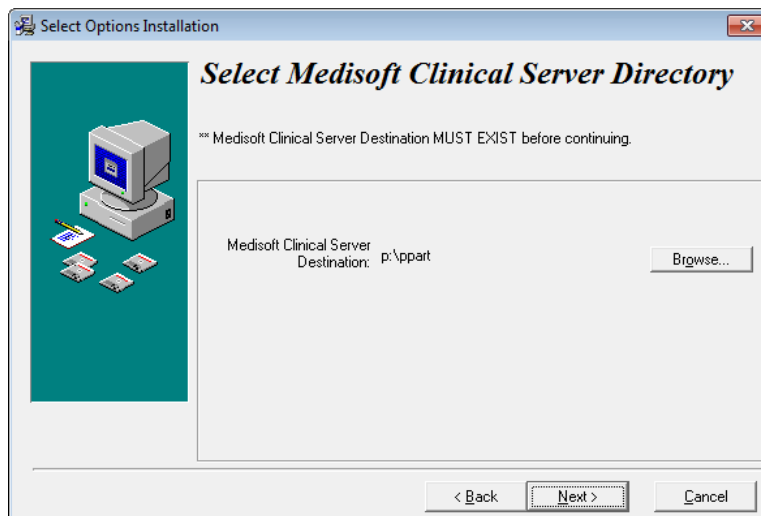


Figure 13. Select Medisoft Clinical Server Directory screen

16. Click the **Next** button. The Ready to Install screen appears.
17. Click the **Next** button. The installation begins.

18. Install any Medisoft Clinical Add-Ons that you want to install. For more information on Add-Ons, see [“Add-Ons” on page 37](#).
19. After you complete the upgrade of Medisoft Clinical and any Add-Ons, start Medisoft Clinical from the Start menu. It will automatically install any patches for the client workstation.
20. Repeat these steps for each workstation.



## Accessing and Registering Medisoft from the Workstation

When you purchased Medisoft Network Professional, you also purchased a number of connections for your network.

After installation and after Medisoft launches for the first time, the Registration screen appears. Register now or within 30 days after installation. For instructions or questions on registering, click the Help button on the Registration screen.



## Chapter 3 - Linking Medisoft with Medisoft Clinical

You can link Medisoft Client with Medisoft Clinical so that data is transferred between the two applications. Appointments and patient information entered in Medisoft can be sent to Medisoft Clinical and, in turn, billing information can be sent from Medisoft Clinical to Medisoft for billing.

To do this, use McKesson Practice Interface Center (MPIC). McKesson Practice Interface Center is an application that is installed and configured independently of Medisoft Clinical. It has an easy to use interface and will transmit data from Medisoft to Medisoft Clinical and from Medisoft Clinical to Medisoft.

Use the table to determine which version of MPIC to download:

If your server is...	Use this link:
32-Bit	<a href="http://www.medisoft.com/MPIC/V2/MPIC-Setup-32bit-2.2.2.32.exe">http://www.medisoft.com/MPIC/V2/MPIC-Setup-32bit-2.2.2.32.exe</a>
64-Bit	<a href="http://www.medisoft.com/MPIC/V2/MPIC-Setup-64bit-2.2.2.32.exe">http://www.medisoft.com/MPIC/V2/MPIC-Setup-64bit-2.2.2.32.exe</a>

eMDs recommends that you download and open the MPIC User's Guide prior to installing or configuring MPIC.



# Chapter 4 - After Installing Medisoft Clinical

## For More Information

For information on configuring Medisoft Clinical for your practice, see the configuration topics in the Patient Records and Appointment Scheduler online help.

Some of the options you can set up include:

- Access levels
- Operators
- Demographic settings
- Demographic guides
- Ledger templates
- Address defaults
- Printers and printer fonts

## Permissions For Microsoft Operating Systems

Make sure users have adequate permissions to read, write, and change files. Once Medisoft Clinical is installed, reapply permissions to files and subdirectories.

## Watchdog

Watchdog is an application that monitors and services used with Medisoft Clinical and can notify you if there are failures in these applications and services. In addition, you can use Watchdog to shut down and restart applications and services periodically to ensure they are running or when you are running an automatic backup. It can also be set up to notify you via email if there are failures in any applications and services.

To download and install Watchdog, navigate to [http:// www.medisoft.com/Watchdog/](http://www.medisoft.com/Watchdog/) and follow the instructions.



# Chapter 5 - Configuring a Mobile Device

You can configure the following mobile devices with Medisoft: iPad.

Once a device is configured to work with Medisoft, you can perform patient intake, view appointments, enter charges for patients, and create/update superbill templates.

You will need to download and install the application to your mobile device and then enter the API Key and Code to activate it.

## Firewall/Router Considerations for Your Server

Depending on what firewall you use (other than Windows firewall) and what router you use, you may need to update the exception list or you may need to manually open certain ports. You will not be able to connect to a mobile device until the firewall and router settings are updated.

If your firewall has an exception list, make sure that the following program is added to the exception list: PlutoServer.MSL.exe.

If your firewall and/or router requires you to open ports, make sure the following TCP ports are open:

Port
443 Outgoing
A port in the range 49000-50000 incoming - do NOT open the entire range.

To determine which incoming TCP port you need to open, follow these steps:

1. Click Start, point to All Programs, and click **Diagnose Mobile**. The Diagnose Mobile screen appears.

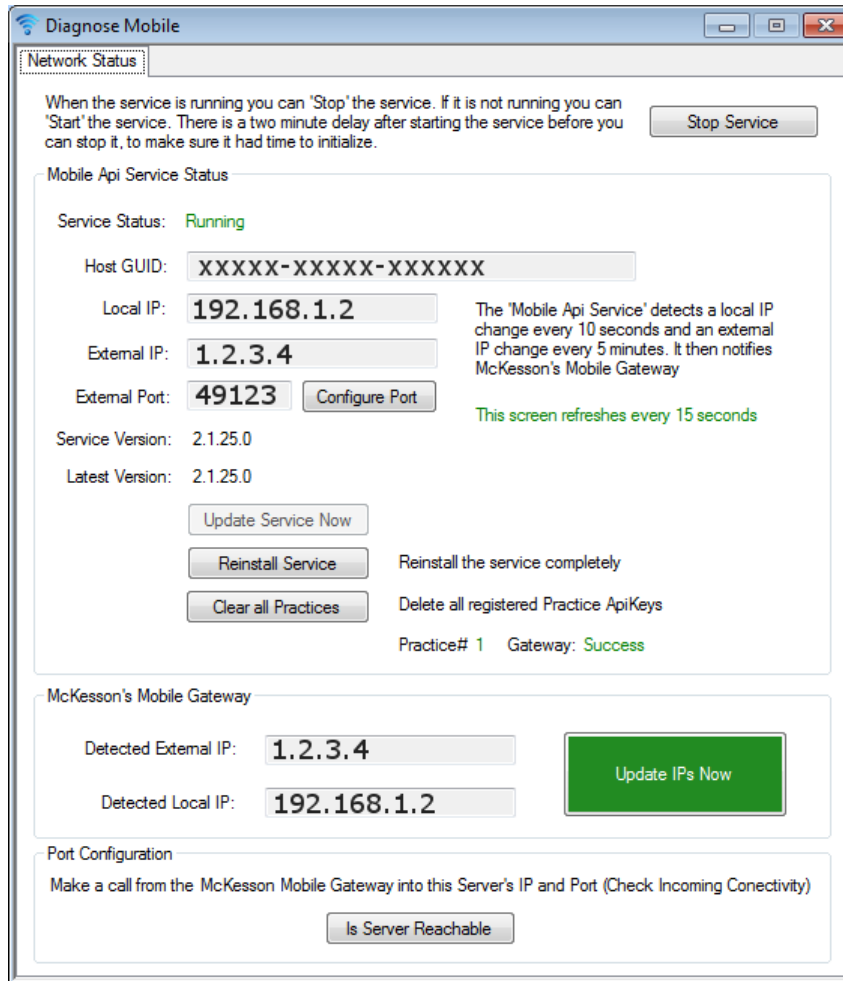


Figure 14. Diagnose Mobile screen

2. Note the Local IP, External IP and External Port.
3. Verify that the Local IP is the correct IP address of your server.
4. Configure your router/firewall to accept connections on the External IP and External TCP Port, and forward them to the Local IP on TCP port 1945. The steps required vary depending on your particular router or firewall. Please consult your router or firewall documentation.
5. Click the **Is Server Reachable** button verify that your firewall/router are correctly set up to accept connections.

### To configure your device

1. Start Medisoft.



2. On the Help menu, click **Mobile**. The Mobile screen appears. By default, only Level 1 users, such as system administrators, have access to mobile functionality. If you do not have Level 1 privileges in Medisoft, see your Medisoft Administrator for access.

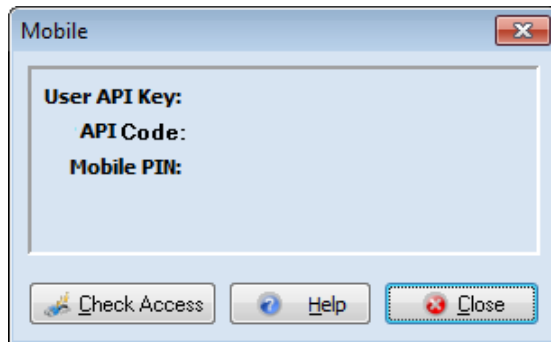


Figure 15. Mobile screen

3. Take note of these values on the Mobile screen.
4. With your mobile device, launch the App Store.
5. Search for Medisoft.
6. Download and install the application for Medisoft.
7. On the mobile device desktop, double-tap the mobile application. The application starts.
8. Enter the API Key and API Code that you noted.
9. Tap **Authenticate**. The application will connect to your Medisoft practice data.
10. Log in to your practice using your Medisoft User ID and Password.
11. Create a Mobile Pin number.

This Pin number is an added layer of security to protect your practice data and is stored on the Edit Users screen for each user who accesses your practice using a mobile device. If you forget the number, your system administrator can access it there.

The Mobile Pin number must be four digits.

### To add another practice

If you have more than one practice, follow this procedure to add another practice.

1. In Medisoft, log into the practice that you want to access from your mobile device.
2. On the Help menu, click **Mobile**. The Mobile screen appears.
3. Take note of the API Key and API Code. These will be different for each practice.
4. Launch the mobile application.
5. Tap Add.
6. Enter the API Key and Code that you noted.
7. Tap Save.

**Troubleshooting**

You can test your connection using the Check Access button on the Mobile screen.

To open the Mobile screen:

- 1. On the Help menu in Medisoft, click **Mobile**. The Mobile screen appears.

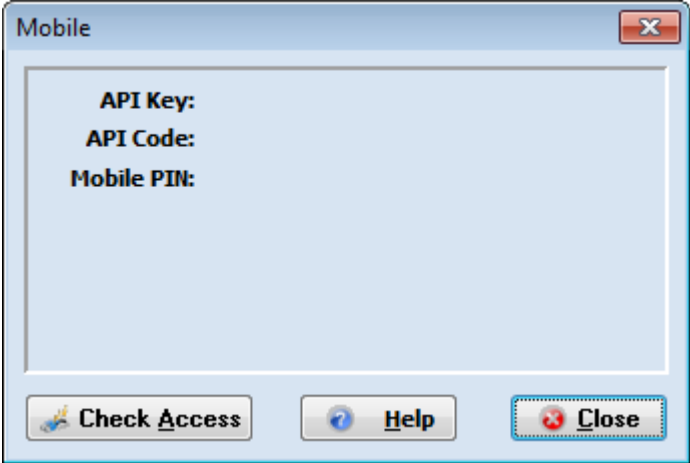


Figure 16. Mobile screen

- 2. Click the **Check Access** button. Connectivity is checked and the status appears.

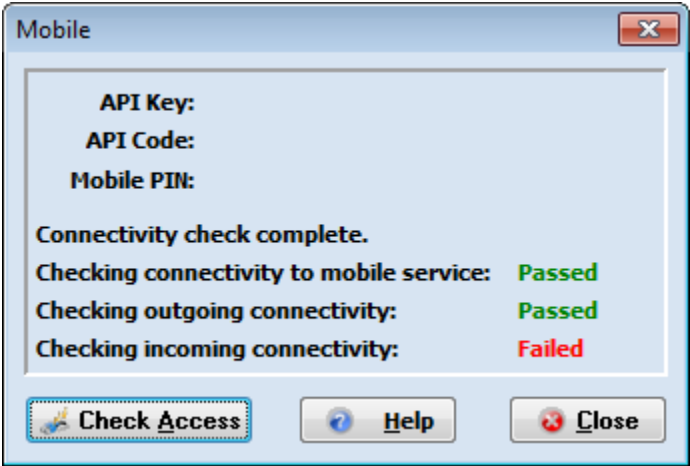


Figure 17. Mobile screen with connectivity checks


If you receive a Failed on any of the checks, here are some possible solutions:

Connectivity Check	Possible Solutions for a Failed status
<p><b>Checking connectivity to mobile service</b></p> <p>If this fails, Medisoft could not connect to the Mobile Service (the application that enables your mobile device to connect to your Medisoft practice data).</p>	<ul style="list-style-type: none"> <li>• Make sure the mobile service is installed on the server. You must have Medisoft Client installed on the server if you want the mobile service installed there as well.</li> <li>• The mobile service is not started. Check your services to make sure it is started.</li> </ul>
<p><b>Checking outgoing connectivity</b></p> <p>If this fails, the Mobile Service could not connect to the Internet for outgoing data.</p>	<ul style="list-style-type: none"> <li>• Check your network cable and verify that your computer can reach the Internet.</li> <li>• Verify that port 443 is open. Consult the documentation for your firewall to learn how to open these ports, or contact your IT administrator/</li> <li>• If you continue to experience problems, check your documentation or contact Technical Support.</li> </ul>
<p><b>Checking incoming connectivity</b></p> <p>If this fails, the Mobile Service could not connect to the Internet for incoming data.</p> <hr/> <p>NOTE: If the check for incoming connectivity fails but the other two checks passed, you can still use a mobile device as long as the mobile device is on the same network as the server.</p> <hr/>	<ul style="list-style-type: none"> <li>• Check your network cable and verify that your computer can reach the Internet.</li> <li>• If you have a firewall other than Windows firewall, verify that the port for incoming data is open (see <a href="#">“Firewall/Router Considerations for Your Server” on page 27</a>). Consult your IT administrator to open the correct port.</li> <li>• Verify that your router is UPNP enabled.</li> <li>• If you continue to experience problems, check your documentation or contact Technical Support.</li> </ul>

## Updating the Superbill Template

You can update the superbill template by adding, changing, or deleting sections and items.

### To open the superbill template:

1. On the mobile device, launch the Medisoft application and log in.
2. Tap the **Setup**  icon at the top of the screen. The Superbill template appears.

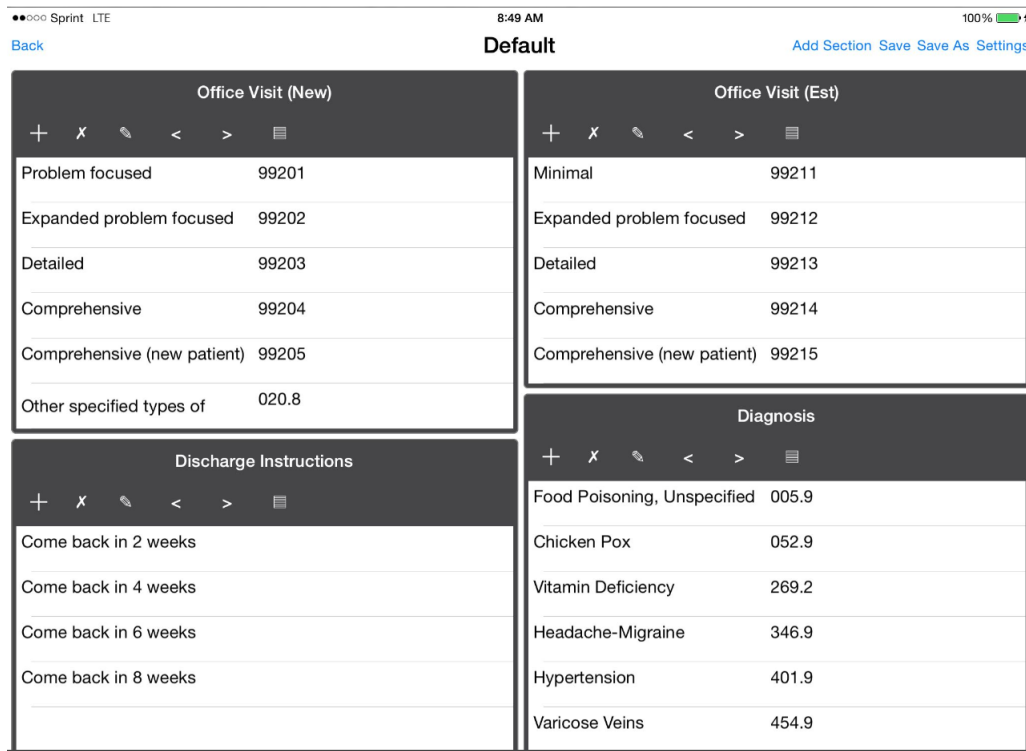


Figure 18. Superbill template

**To add a section:**

1. Tap **Add Section** at the top of the screen.

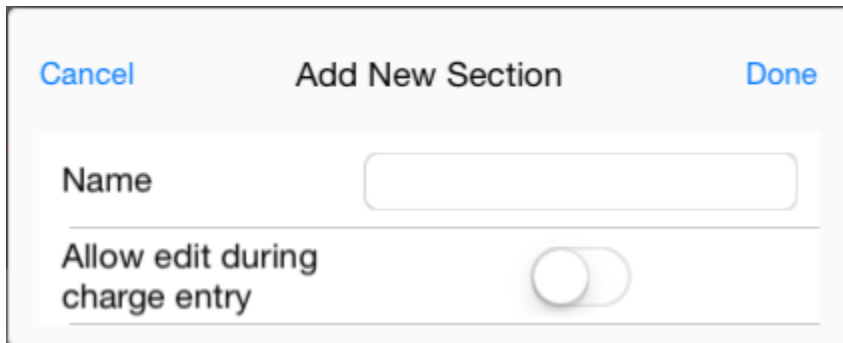


Figure 19. Add New Section screen

2. Enter a title for your new section and tap **Done**. The new section appears on the screen.

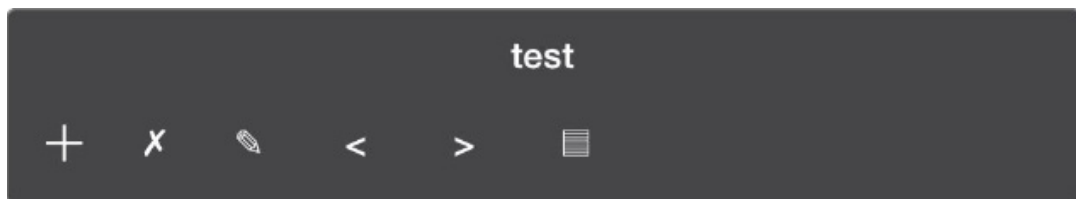








Figure 20. Superbill Template

Icon	Description
	Tap this icon to add fields to a section.
	Tap this icon to remove the section and the fields in the section.
	Tap this icon to edit the section and the fields in the section.
	Tap this icon to move the entire section one section toward the top of the template. If it is currently a right side section, it will move to the left side. If it is currently a left side section, it will move up a row and to the right side. <hr/> <b>Note:</b> You must save a section prior to moving it to a different position on the template.
	Tap this icon to move the entire section one section toward the bottom of the template. If it is currently a left side section, it will move to the right side. If it is currently a right side section, it will move down a row and to the left side. <hr/> <b>Note:</b> You must save a section prior to moving it to a different position on the template.
	Tap this icon to reorder the fields in the section.

3. Next, add items to the section. To do so, tap the + icon. You can select one of five types of items:

Icon	Description
+P	Opens the Search Procedure screen so you can add a procedure.
+D	Opens the Search Diagnosis screen so you can add a diagnosis.
+F	Opens the Add Free Text screen so you can add free text to your new section.
+C	Opens the Add Canned Text screen so you can add canned text to your new section.
+U	Opens the Add URL screen so you can add a URL for a web page.

- When you click an icon, the appropriate screen appears.

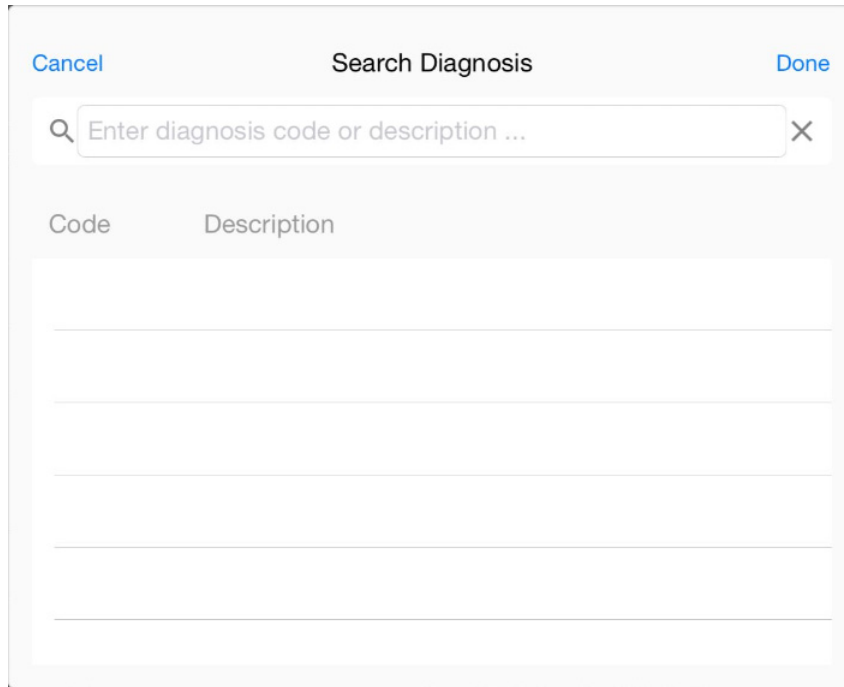


Figure 21. Search Diagnosis screen

- Enter characters to search for the item and tap **Search**. The list of item appears.
- Tap the item you want and tap **Add**. The item appears in your new section.

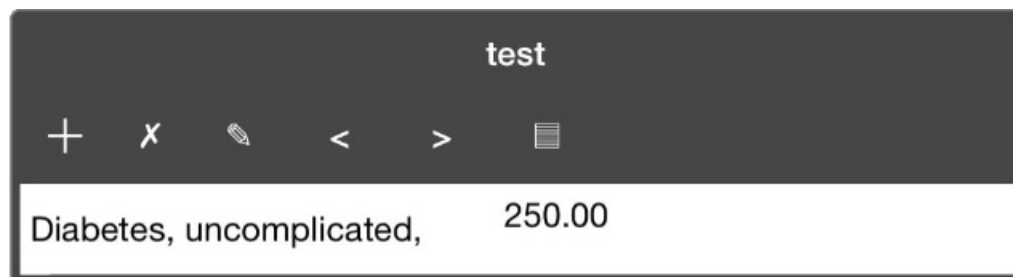


Figure 22. Section

- Tap **Save** to save the template.

#### To edit a section:

- Tap the Edit icon. The Edit screen appears.
- Tap Section.
- Make your changes.
- Tap Done.
- Tap **Save** to save the template.

**To edit a field in a section:**

1. Tap the field in the section to select it.
2. Tap the Edit icon. The Edit screen appears.
3. Tap Selected Field.
4. Make your changes.
5. Tap Done.
6. Tap **Save** to save the template.

**To remove a section:**

1. Tap the X icon on the section.

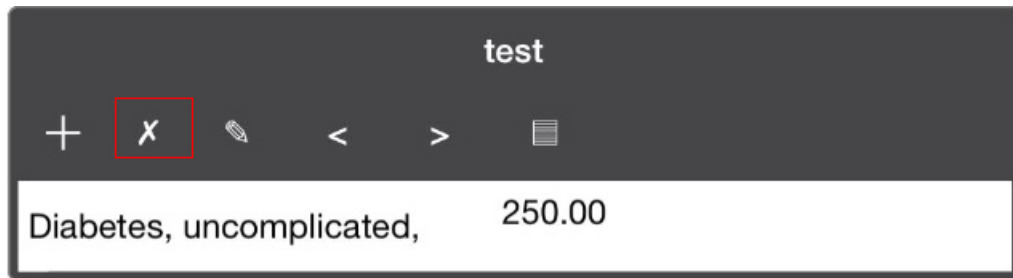


Figure 23. Section

The Remove screen appears.

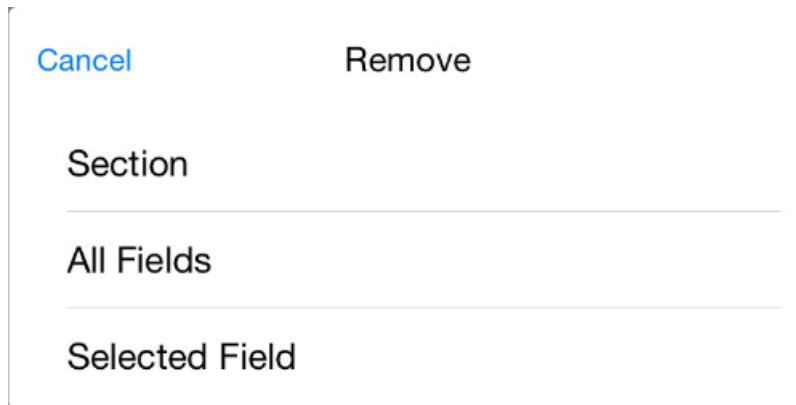


Figure 24. Remove section

2. Tap Section. The section is removed.
3. Tap **Save** to save the template.

**To remove a field from a section:**

1. Highlight the field you want to remove.
2. Tap the X icon for the section. The Remove screen appears.
3. Tap Selected Field. The selected field is removed.
4. Tap **Save** to save the template.





## Appendix A - Add-Ons

Your Medisoft Clinical DVD comes with six add-on applications that can enhance the capability of Medisoft Clinical. These add-Ons are

Add-On	Description
ePrescribing	Use ePrescribing to send and receive prescription-related messages to and from pharmacies, to view real-time pharmacy benefits and eligibility data on your patients, to see up-to-date formulary and coverage information for specific drugs during the prescribing process, and to view information about prescriptions your patients have had filled, even from other providers
Templates	Use Templates to save time by eliminating the need to type up routine tasks.
PPConnect	Use PPConnect to add and update information from a third-party system into Practice Partner Patient Records and Appointment Scheduler, as well as Practice Partner to a third-party system.
Remote Client Connect	Use Remote Client Connect to run interfaces on client workstations.
LabCorp	Use LabCorp to receive patient lab results and send orders created in Patient Records to the lab.

## Installing Add-Ons

### To install an Add-On:

1. Insert the Medisoft Clinical DVD in the drive. The Autorun screen appears. If the Autorun screen does not appear automatically, click **Start** and select **Run**. The Run screen appears. On the Run screen in the Open field, type X:\AUTORUN (where X is your DVD-ROM drive letter) and click the **OK** button.
2. Click the **Medisoft Clinical Add-Ons** link. A list of Add-Ons appears.
3. Click the link for the Add-On you want to install. The installer starts.
4. Follow the installation wizard for the Add-On.



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