

# Medisoft 21

## Medisoft 21 Service Pack 1 Installation Guide



February 2017

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Medisoft®

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# Chapter 1 - Medisoft Installation Overview

NOTE: Medisoft® 21 uses Advantage 11.10. If you are upgrading, you MUST install Advantage 11.10. Once you have installed Advantage 11.10, you will not be able to access an Advantage Server that is prior to Advantage 11. You will be able to access your database as long as your database server is at least Advantage 11.

## Quick View: 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 2003 SP2 32-Bit or 64-Bit, or Windows Server 2003 R2 SP2 32-Bit or 64-Bit	Y	N/A	Y	N/A
Windows Server 2012 or 2008 32-Bit	Y	N/A	Y	N/A
Windows Server 2012 or 2008 R2 64-Bit	Y	N/A	Y	N/A
Windows 10	Y	Y	Y	Y
Windows 8 Professional 32-Bit	Y	Y	Y	Y
Windows 8 Professional 64-Bit	Y	Y	Y	Y
Windows XP Professional SP3 32-Bit	Y	Y	Y	Y
Windows 8 or 7 Professional 32-Bit	Y	Y	Y	Y
Windows 8 or 7 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 will not support Windows RT on the ARM processor.

## Medisoft Hardware Requirements

### Workstation (minimum required)

CPU (Processor)	Intel Pentium 4 2.0GHz
RAM (Memory)	2GB
Storage Space	10GB (20GB for Net Pro)*
Optical Drive	DVD-ROM (required if installing from a CD)
Network Card (NIC)	100Mbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

### Workstation (Recommended)

CPU (Processor)	Intel i3 or higher
RAM (Memory)	4GB
Storage Space	20GB*
Optical Drive	DVD-ROM (required if installing from a CD)
Network Card (NIC)	1Gbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

### Server (Minimum Required)-Network Professional

CPU (Processor)	Intel Core 2 Duo 2.0GHz
RAM (Memory)	4GB
Storage Space	20GB*
Optical Drive	DVD-ROM (required if installing from a CD)
Network Card (NIC)	100Mbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

\*Your database will grow as you add data to your practice, increasing the amount of space needed on the hard drive.

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

**IMPORTANT:** You also must have an Internet connection to use Network Professional.

## Server (Recommended)-Network Professional

CPU (Processor)	Intel i3 or higher
RAM (Memory)	8GB
Storage Space	40GB*
Optical Drive	DVD-ROM (required if installing from a CD)
Network Card (NIC)	1Gbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

**IMPORTANT:** You also must have an Internet connection to use Network Professional.

\*Your database will grow as you add data to your practice, increasing the amount of space needed on the hard drive.

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

## Server Operating System – Minimum Required

- Windows Server 2003 (Enterprise or Standard editions with latest service packs)

## Server Operating System – Recommended

- Windows 7 Professional/Ultimate (32 or 64 Bit)
- Windows Server 2008R2

## Server Operating System – Supported

- Windows Server 2003 (Enterprise or Standard editions with latest service packs)
- Windows 7 Professional/Ultimate (32 or 64 Bit)
- Windows 8 Professional/Enterprise (32 or 64 Bit)
- Windows Server 2008 SP2 or higher (32 Bit)
- Windows Server 2008 R2 (64 Bit)
- Windows Server 2012 (64 Bit)

## Encoder Pro

Medisoft 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.

## Security

eMDs' Mobile Application utilizes HIPAA compliant data transmission safeguards, such as encryption and authentication for all Mobile Application connections and communication to secure and maintain confidentiality of data.

## 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 System Requirements

## 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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e-MDs 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 2003 32-bit
- Windows Server 2012
- Medisoft 18 or higher
- Windows PowerShell (if you are using Windows Server 2003 32-bit)

### 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 2003 32-bit
- Windows Server 2012
- Medisoft 18 or higher

# Installation Overview

This document contains instructions for all versions of Medisoft 21 including Medisoft Reports Professional. Carefully review the instructions for your version of Medisoft 21 and hardware and software requirements before installing the software.

If you purchased Medisoft 21 Single User or Advanced, see [“Installation Instructions for Medisoft Single User and Advanced”](#) on page 7.

If you purchased Medisoft 21 Network Professional, see [“Installation Instructions for Medisoft Network Professional”](#) on page 11

If you purchased Medisoft Reports Professional, see [“Installation Instructions for Medisoft Reports Professional”](#) on page 17.

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Only the installation of Medisoft Network Professional requires pre-installation setup of a network, as well as installation on both the server computer and the workstations.

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If you receive an error trying to open a PDF file or to install Adobe Reader, go to the Adobe web site and download the latest version of Adobe Reader.

# Chapter 2 - Installation Instructions for Medisoft Single User and Advanced

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**WARNING:** If you are installing over a previous version of Medisoft, it is very important that you back up your data. Refer to the Medisoft Online Help for instructions on backing up your data.

---

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.

## Prior to Installation - Upgrades

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If you are upgrading from Medisoft 18 or earlier, please read the following section that pertains to ICD-10 codes.

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### Prepare Diagnosis Codes for Conversion and Entry of ICD-10 Codes

The Centers for Medicare and Medicaid Services (CMS) is adopting a new system of diagnosis codes, to go into effect October 1, 2014. This new system, ICD-10 (International Classification of Diseases, 10th revision), will provide 68,069 diagnosis codes for expanded, more detailed coding and billing. Medisoft provides the ability to store and use ICD-10 codes on new claims for your practice.

In Medisoft Client, print the Diagnosis Code grid as a reference for your existing diagnosis codes.

When Medisoft 21 is installed, all values in the Code 1 field will be copied to the ICD-9 field (formerly the Code 2 field), IF the field was empty. If the ICD-9 field was populated, no change will be made. In addition, the ICD-10 field (formerly the Code 3 field) will be cleared. Any ICD-10 codes or other values that had been in this field must be re-entered after conversion to Medisoft. In addition, you must change all values in the ICD-9 field (formerly Code 2) if the information copied from the Code 1 field during conversion is not a valid ICD-9 code.

## Standard Installation

1. Insert the Medisoft DVD in the local DVD-ROM drive. The Installation screen appears. If the Installation 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. The Installation screen appears. e-MDs recommend 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.

2. On the Installation screen, click **Install Medisoft**. If you are installing on Windows 8 or Windows 7, the User Account Control screen may appear. Click **Allow**. The Welcome screen appears.
3. Click the **Next** button. The End User License Agreement appears.
4. Click the **I Accept the agreement** radio button.
5. Click the **Next** button. The Subscription Agreement screen appears.
6. Click the **I accept the agreement** button
7. Click the **Next** button. The Program Selection screen appears. On the Program Selection screen, select the Installation type by clicking the button next to the type of product you purchased.

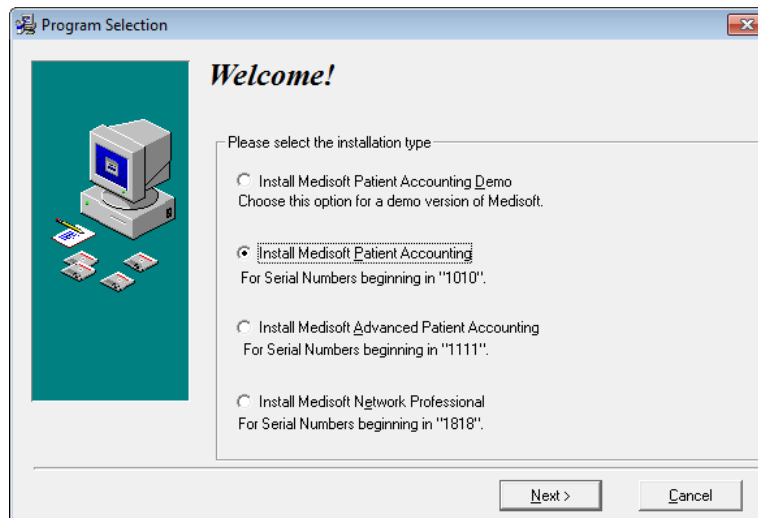


Figure 1. Program Selection screen

**NOTE:** The first four digits of the product serial number identify the product type.

8. Click the **Next** button. The Select Installation Type screen appears.
9. Click the **Express Install (Recommended)** button.
10. Click the **Next** button. The Select Destination Directory screen appears.
 

Click Browse if you want to change the location of the Medisoft files on your hard drive. e-MDs recommends that you leave the default setting.
11. Click the **Next** button. The Ready to Install screen appears.
12. Click the **Next** button. The Installing screen appears and tracks the progress of the installation.
13. The Installation Completed screen appears.

14. Click the **Finish** button. The installation program closes.

Option: on the Installation Completed screen, select the Launch Medisoft Patient Accounting box. Click the Finish button.

The first time Medisoft opens after an upgrade a data conversion message appears. Consider backing up data before completing data conversion. If you are working with multiple practices, each time you open a new practice that particular practice also needs to be converted until all practices have been converted to the current version.

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.

## After Installation - Upgrading

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If you are upgrading from Medisoft 18 or earlier, please read the following information.

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Once the installation of Medisoft is complete and your practice data has been converted, use the new ICD-10 Code Mapping Utility to create ICD-10 codes. There is no straight one-to-one mapping from either ICD-9 to ICD-10 or vice-versa for ALL codes. However, approximately 88% of all ICD-10 codes can be mapped to a single ICD-9 code with an exact or approximate match. The Centers for Medicare and Medicaid Services (CMS) has provided General Equivalency Mappings to help coders with the process. For the remainder of the codes, ICD-10 codes can be mapped to more than one ICD-9 code, and for a very small percentage there is no ICD-9 equivalent.

### To use the ICD-10 Code Mapping Utility:

1. On the Tools menu, point to Services, and click **ICD-10 Code Mapping Utility**. The ICD-10 Code Mapping Utility screen appears. There is an Instructions tab to help you understand how to use this utility.
2. Use the Auto-Mapping tab to create ICD-10 codes that have a direct match to an ICD-9 code.
3. Use the Other Mappings tab to create mappings for codes that do not have a one-to-one equivalent.
4. Click **Create Selected Codes** on each tab to create the codes.

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Do not use Medisoft to enter transactions or create claims until your codes are updated properly!

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# Chapter 3 - Installation Instructions for Medisoft Network Professional

## Installing the Advantage Database Server

You must have administrative privileges to complete the installation.

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You must complete the installation or upgrade of the Advantage Database Server for Medisoft 21.

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### Pre-Server Installation Setup

1. Designate a computer as the server. Use this server for storing your data. **NOTE:** Do not also use the server as a workstation.
2. Create a folder for the root data path (that is, Medidata). Use the UNC (Universal Naming Convention) address to designate the shared folder (for example, \\ServerName\FolderName).
3. Set up file sharing on the designated server. For more information on configuring file sharing on a server, review the documentation provided for your server computer.

To share the root data folder, open Windows Explorer and select the root data folder. Select **Sharing and Security**. On the Sharing tab, click **Share this folder** and click the **Permission** button. Select **Full Control**. Click the **OK** button. Click the **OK** button.

4. Map your workstations to the server computer so they can access the Medisoft data folder.

### Server Installation Setup

1. If you are not installing over a previous version of Advantage go to Step 6.
2. If you are installing over a previous version of Advantage, click **Start** and navigate to the Control Panel.
3. From the Control Panel, select the **Performance and Maintenance** option.
4. Select **Administrative Tools** and then **Services**.

Depending on your version of the screens operating system and if you are using the Classic view option, the Performance and Maintenance option does not always appear. In this case, go to the Administrative Tools option.

5. Find Advantage Database Server and right-click. Select **Stop**.
6. Insert the Medisoft DVD in the server DVD-ROM drive. The Installation screen appears.

---

**NOTE:** If the Installation 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. The Installation screen appears. e-MDs 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.

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7. Click the **Advantage Tools** link.
8. Click the **Advantage Server** link. The Advantage Database Server for Windows v11.10 screen appears.
9. Click the **Next** button. The License Agreement screen appears.
10. Select the **I accept the terms in the license agreement** button.
11. Click the **Next** button. The Destination Folder screen appears.
12. Select a directory for the Advantage Database Server installation. The default location is the recommended choice.

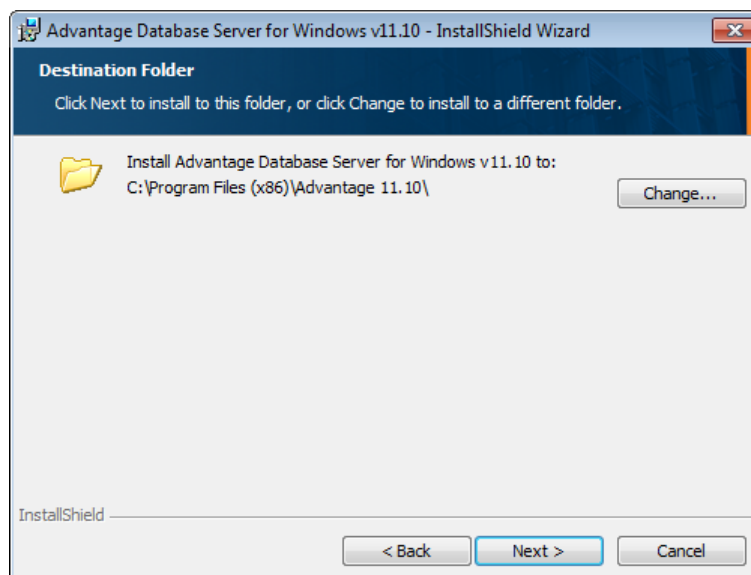


Figure 2. Destination Folder screen



- To select the default location, click the **Next** button. The Ready to Install the Program screen appears.

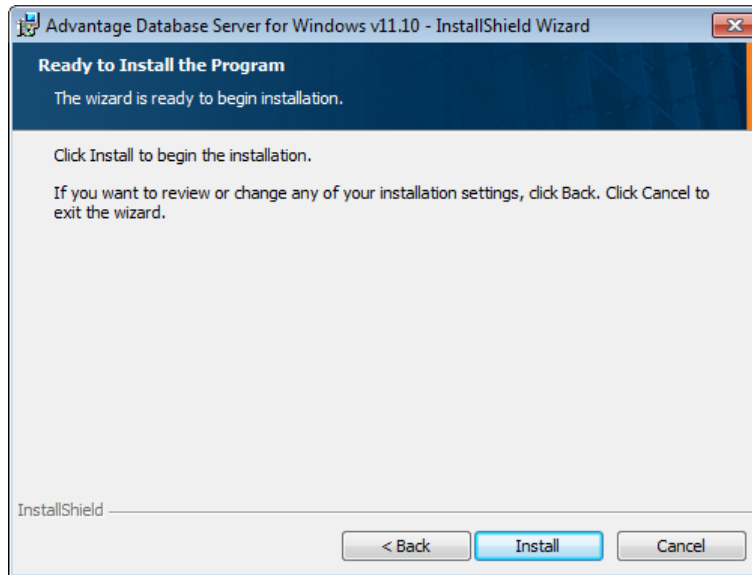


Figure 3. Ready to Install the Program screen

**Option:** click the **Change** button to select a different directory other than the default selection. On the Change Current Destination Folder screen, navigate to the desired location. Then click the **OK** button. On the Destination Folder screen, click the **Next** button.

- Click the **Install** button. A progress bar appears tracking the installation. The Product Information screen appears.
- Enter the Advantage serial number. Select the **I have a product validation code** button. In the Validation Code field, enter the validation code. Refer to the Advantage

Certificate of Authenticity included with the installation materials for the serial number and validation code.

Advantage Database Server for Windows v11.10 - InstallShield Wizard

### Product Information

Enter the Advantage Serial Number, a Validation Code or an Authorization Code (for evaluation), and the optional Replication Code. The Serial Number, Validation Code, and the optional Replication Code can be found on the Advantage Serial Number ID card.

Serial Number:

I have a product validation code  
 I have an evaluation Authorization code

Validation Code:

Replication Code:

Click the following link to request a 30 day evaluation of Advantage Database Server.  
<http://www.sybase.com/ads11>

Cancel < Back Next >

Figure 4. Product Information screen

16. Click the **Next** button. The Product Owner screen appears.

Advantage Database Server for Windows v11.10 - InstallShield Wizard

### Product Owner

Page Number

Enter the name of the Registered Owner of the Advantage Database Server.

Registered Owner:

Automatic services start every time the system starts. Manual services can be started by a user once logged in.

Automatic Startup  Manual Startup

Cancel < Back Next >

Figure 5. Product Owner screen

17. Enter the name of the registered owner. Select the **Automatic Startup** button.

18. Click the **Next** button. The ANSI Character Set screen appears.

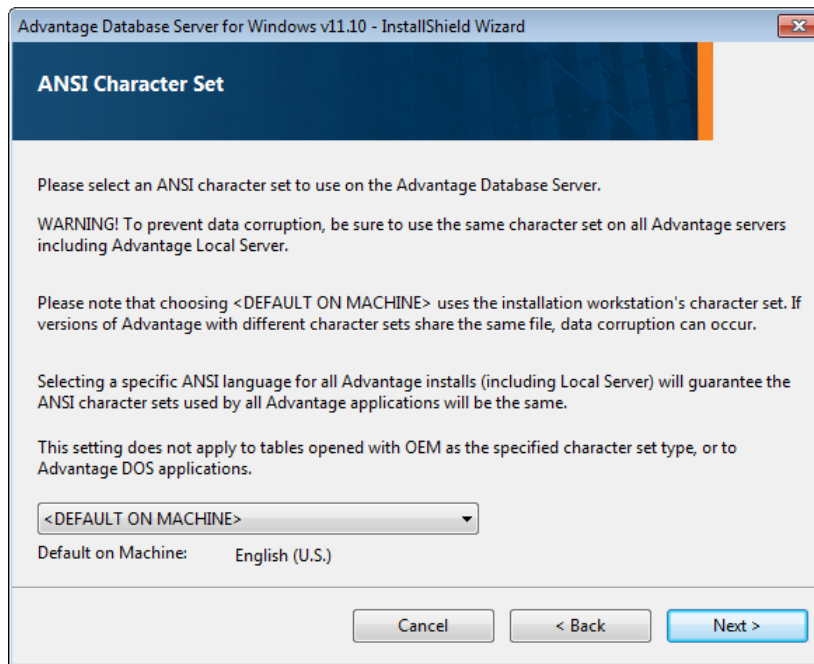


Figure 6. ANSI Character Set screen

19. Select from the drop-down list an appropriate character set. The recommended choice is the default selection, **ENGL(AMER)**, for American English.
20. Click the **Next** button. The OEM Localized Character Sets screen appears.
21. Click the **Next** button. The Installation Complete screen appears.
22. Click the **Finish** button.

If an Advantage Configuration Utility screen is open, click Exit.

Option: On the Medisoft Installation screen, click the Exit link or continue other installation processes.

# Installing Medisoft Network Professional

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.

## Installing Medisoft on Each Workstation

1. Insert the Medisoft DVD in the local DVD-ROM drive. The Installation screen appears. If the Installation 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. The Installation screen appears. e-MDs 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.
2. On the Installation screen, click **Install Medisoft**. The Welcome screen appears. If you are installing on the Windows 8 or Windows 7 platform, the User Account Control screen may appear. Click the **Allow** button.
3. Click the **Next** button. The End User License Agreement appears.
4. Click the **I Accept the agreement** button.
5. Click the **Next** button. The Subscription Agreement screen appears.
6. Click the **I accept the agreement** button.
7. Click the **Next** button. The Program Selection screen appears.
8. Select the **Installation type**.

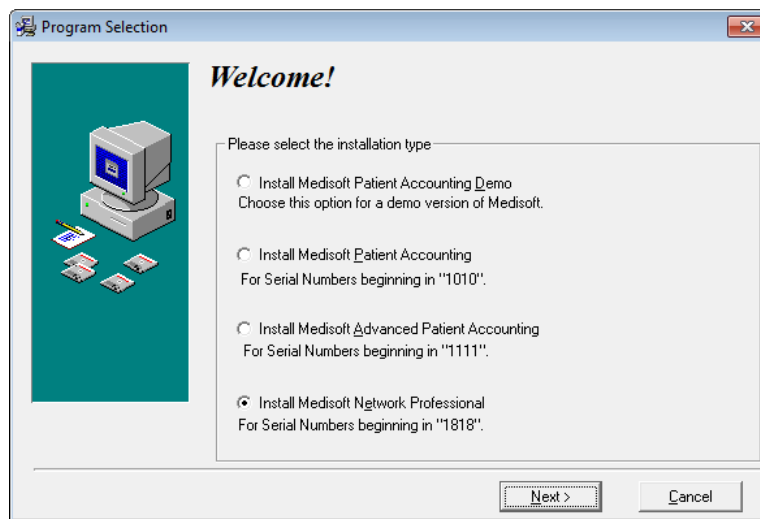


Figure 7. Program Selection screen

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**NOTE:** The first four digits of the product serial number identify the product type.

---

9. Click the **Next** button. The Select Installation Type screen appears.

10. Click the **Express Install (Recommended)** button.
11. Click the **Next** button. The Select Destination Directory screen appears. If you want to change the default, click Browse. McKesson recommends that you leave the default setting.
12. Click the **Next** button. The Ready to Install screen appears.
13. Click the **Next** button. The Installing screen appears and tracks the progress of the installation.
14. The Installation Completed screen appears.
15. Clear the check box to launch Medisoft immediately.
16. Click the **Finish** button. The installation program closes.
17. Repeat these steps for each client workstation.

## After Installation - Upgrading

### *Converting data*

Prior to launching Medisoft, you must stop two services. To do so:

1. Click the **Start** button.
2. Enter services in the Search programs and files field.
3. Press **Enter**. The Component Services screen appears.
4. Click Services (local). The list of services appears.
5. Find McKesson MSL Mobile Api Server. Right-click and select Stop.
6. Find MPIC service. Right-click and select Stop.
7. Launch Medisoft, open your practice, and allow it to convert the data.
8. Return to the Component Services screen and restart PlutoServer.MSL and MPIC service.

The new claim delivered with v20 is already set to use the ICD-9 or ICD-10 fields.

## After Upgrading from Releases prior to Medisoft 19

Medisoft 19 was the ICD-10 Ready release of Medisoft. Prior to using Medisoft 21, review the Release Notes for Medisoft 19, as they have all of the features that were added to make Medisoft ICD-10 ready. You can find those release notes here: <https://socialkb.mckesson.com/var-central/Medisoft%20Product%20Release%20Notes> .

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Note: You do NOT need to perform the Before or After Install sections in the Medisoft 19 Release Notes.

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If you have upgraded from Medisoft 18 or earlier, you must run the Clear ICD-10 utility to ensure that no ICD-9 codes remain in the ICD-10 fields on the Enter Diagnosis screen.

This field is now used for ICD-10 codes. For steps to run the utility, see [“Running the Clear ICD-10 utility”](#) on page 18.

## Running the Clear ICD-10 utility

This utility clears your diagnosis table of ICD-9 codes that appear in the ICD-10 Code field and description.

1. Navigate to the Bin directory in your Medisoft folder.
2. Double-click ClearICD10utility.exe. The Open Practice screen appears.

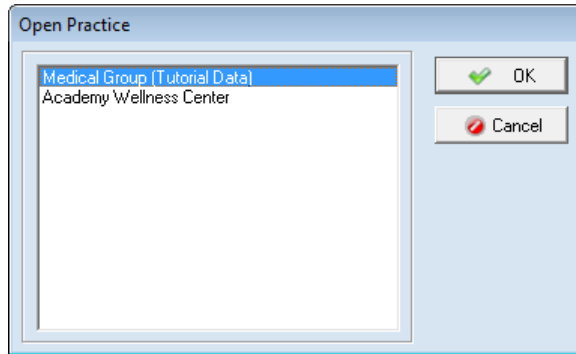


Figure 8. Open Practice screen

3. Select your practice and click the **OK** button.
4. If your practice has login security, enter your Login Name and Password. Then, click the **OK** button.

If...	Then...
an Information screen appears telling you there are no matching codes,	Click the <b>OK</b> button. You do not need to run this utility.
the Clear ICD-10 Utility screen appears,	Continue this procedure with step <a href="#">5</a> .

5. On the Clear ICD-10 Utility screen you will see a grid of matching codes. In the example shown in [Figure 9](#) on page 19, notice that the values in the ICD-9 and ICD-10

columns are the same. The values in the ICD-10 columns are invalid and must be cleared.

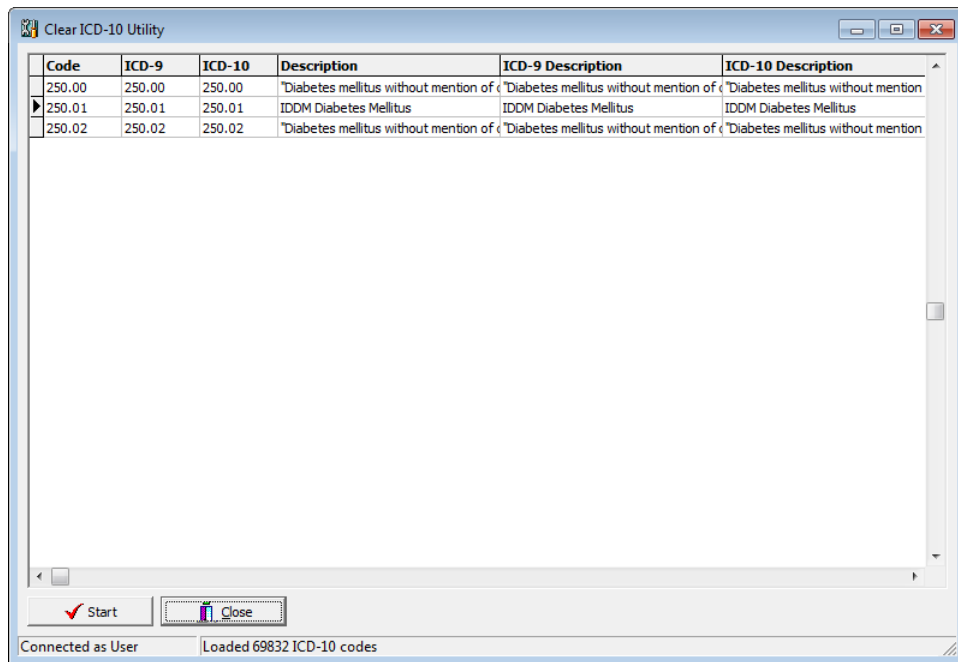


Figure 9. Clear ICD-10 Utility screen

6. Click the **Start** button. You will see a progress bar and then a warning screen appears.

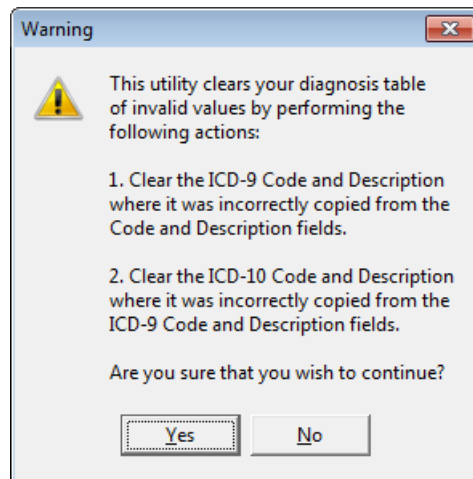


Figure 10. Warning screen\*

\*Note: This is a preexisting utility. All it will do is clear the ICD-10 field when the value is the same as the ICD-9 field. No information was copied incorrectly, as indicated by the Warning screen.

7. Click the **Yes** button. The Clear ICD-10 Utility screen appears when the process is complete.

In the example (Figure 11 on page 20), all of the invalid values have been cleared.

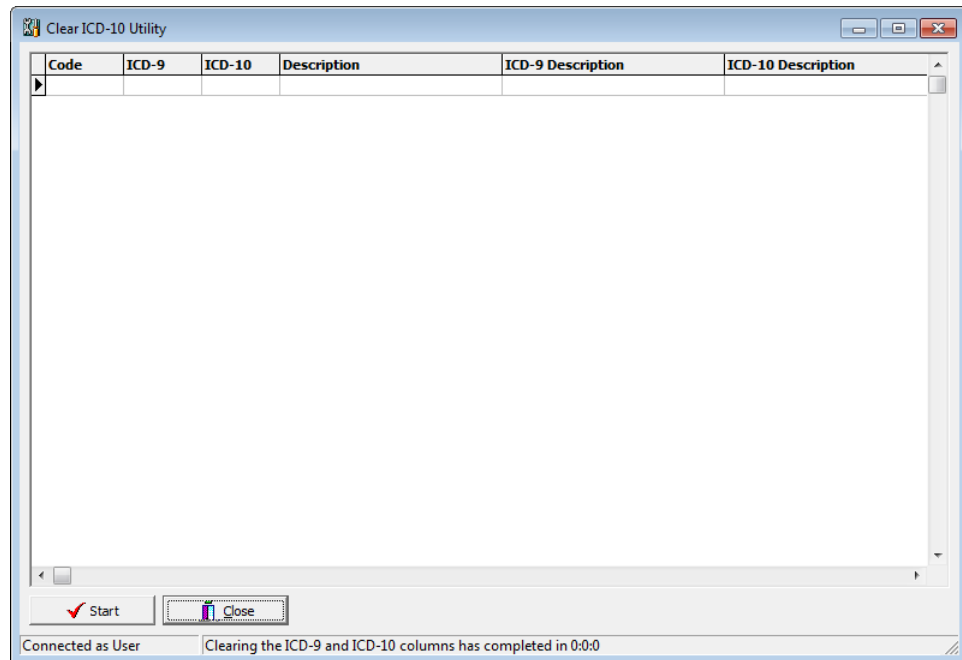


Figure 11. Clear ICD-10 Utility screen

8. Click the **Close** button.

## Accessing and Registering Medisoft from the Workstation

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

After Medisoft has been installed on each computer, run the program on any workstation. The first time the program opens, a data conversion message appears if you are upgrading. Consider backing up data before completing data conversion. Once the conversion is completed from the first workstation, Medisoft will open normally on the remaining workstations.

If you are installing for the first time, you will specify to create a new practice and tell Medisoft to place the data files on the shared folder on the server that you created in "[Pre-Server Installation Setup](#)" on page 11.

If you are working with multiple practices, each time you open a new practice that particular practice also needs to be converted until all practices have been converted to the current version.

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 4 - 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.

## Security

eMDs' Mobile Application utilizes HIPAA compliant data transmission safeguards, such as encryption and authentication for all Mobile Application connections and communication to secure and maintain confidentiality of data.

## 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.

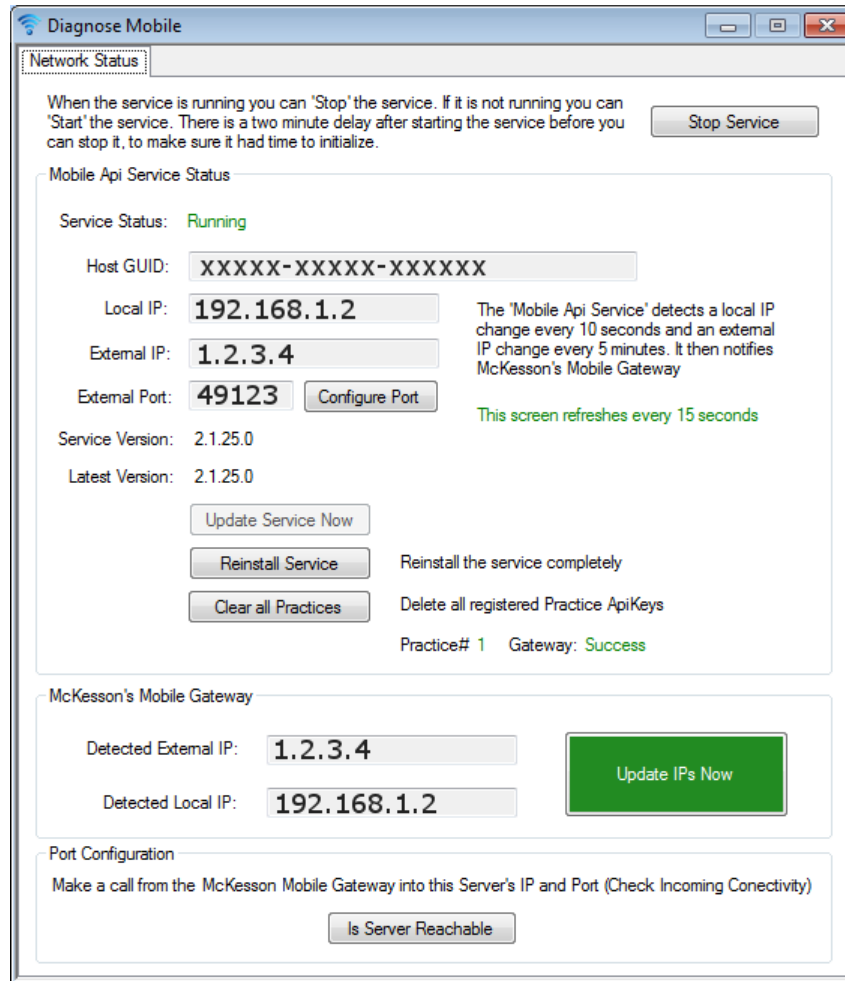


Figure 12. Diagnose Mobile screen

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.

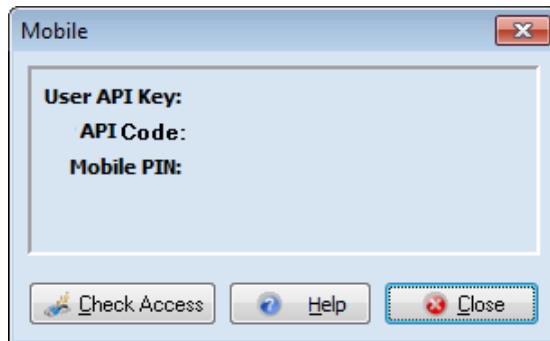


Figure 13. Mobile screen

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 14. Mobile screen

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

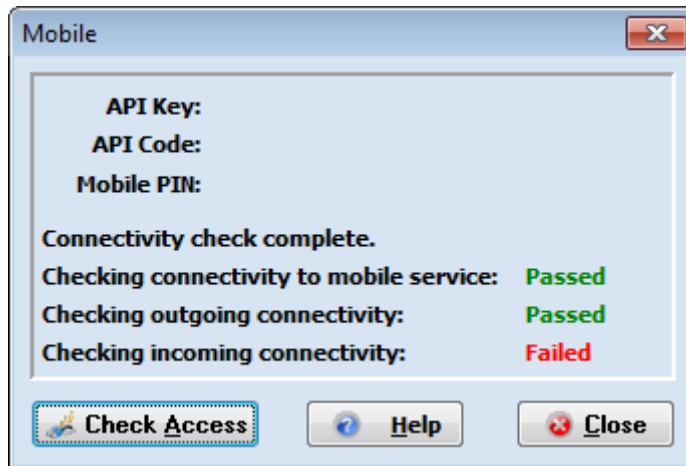


Figure 15. Mobile screen with connectivity checks


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”</a> on page 23). 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.

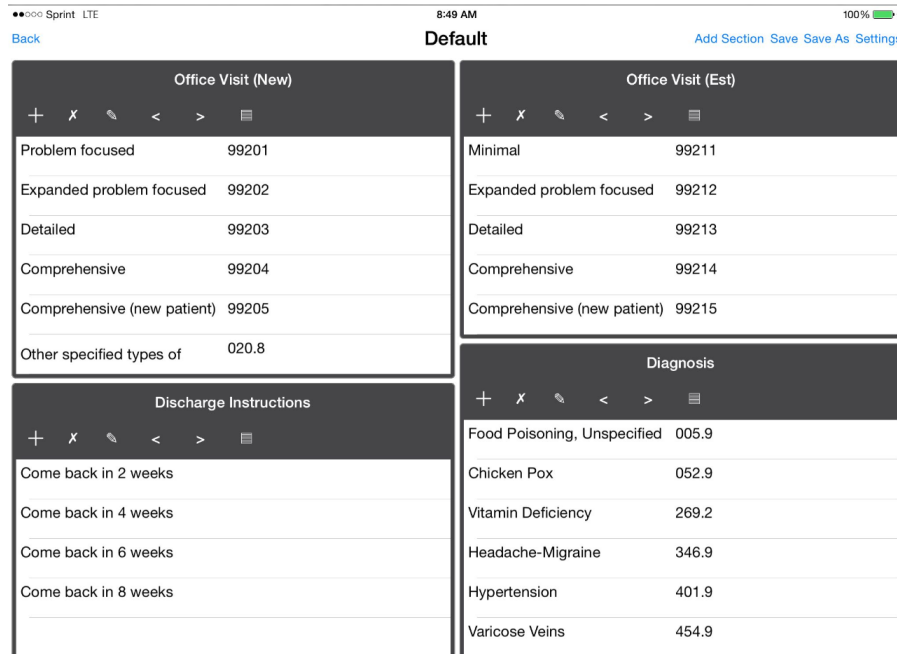


Figure 16. Superbill template

**To add a section:**

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

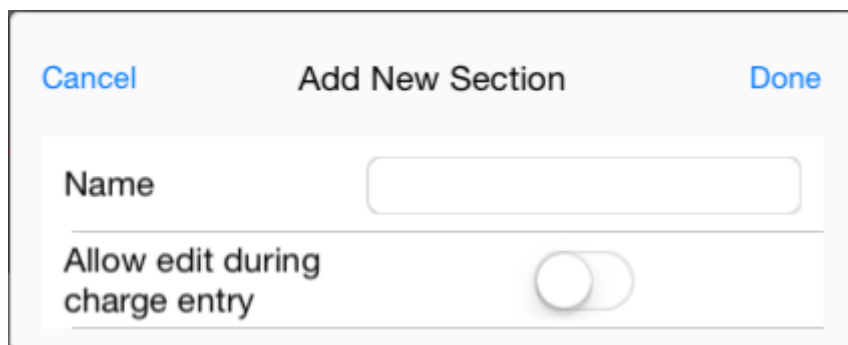


Figure 17. Add New Section screen

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

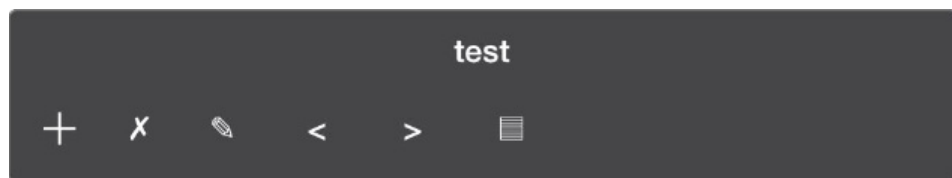










Figure 18. Superbill Template

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.

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

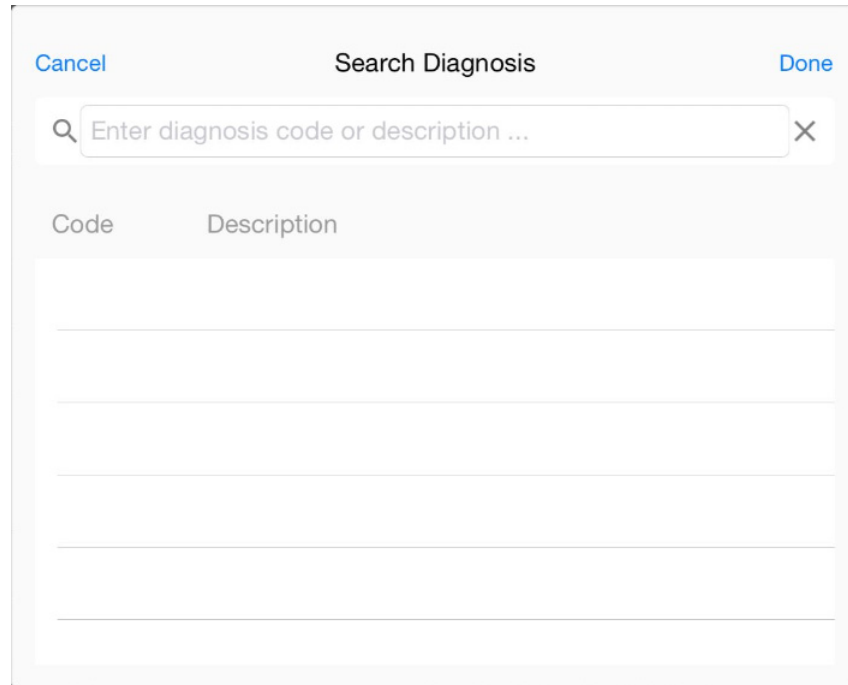


Figure 19. Search Diagnosis screen

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

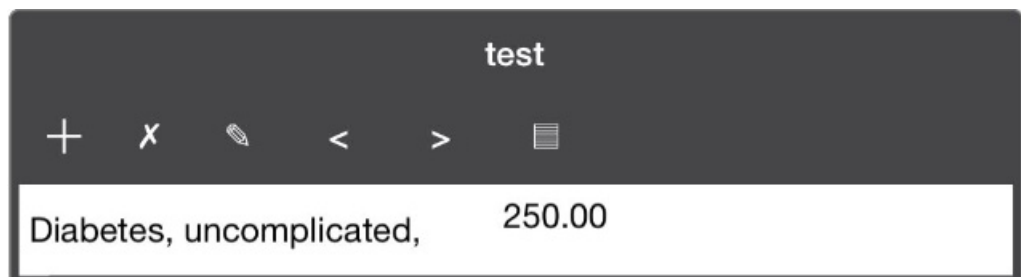


Figure 20. Section

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

#### To edit a section:

1. Tap the Edit icon. The Edit screen appears.
2. Tap Section.
3. Make your changes.
4. Tap Done.
5. 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.

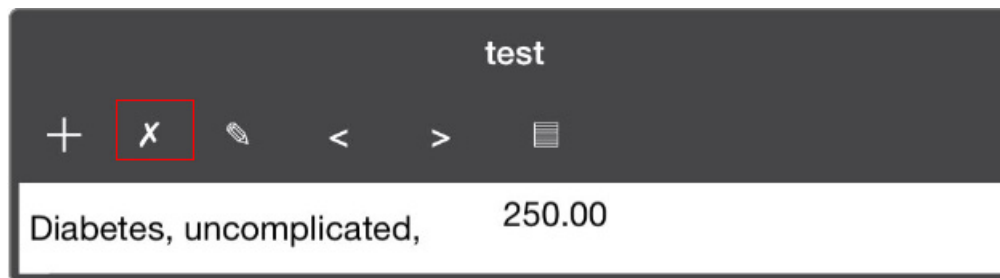


Figure 21. Section

The Remove screen appears.

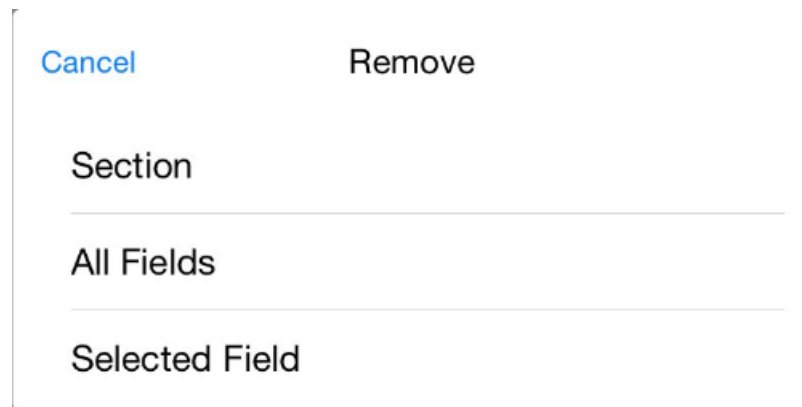


Figure 22. Remove section

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.



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