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ChartMaker® Medical Suite Upgrade Instructions

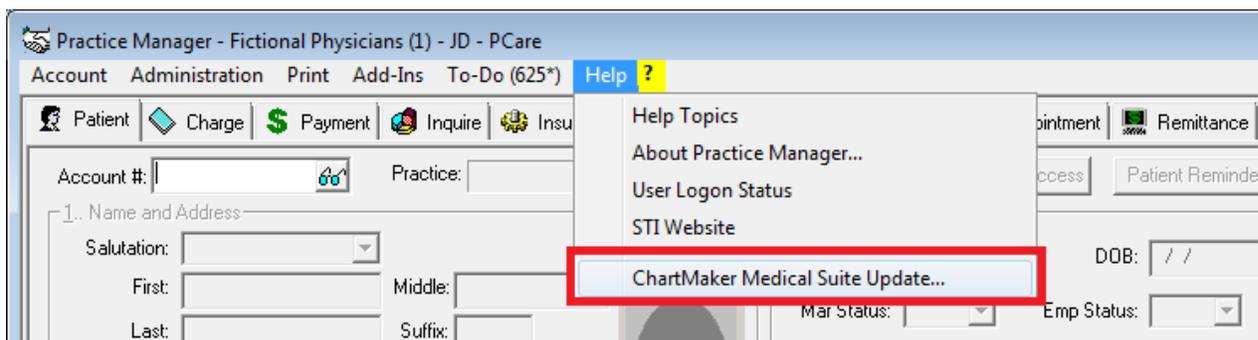
This document will guide you through the process of downloading and installing the ChartMaker® Medical Suite upgrade via the Clinical or Practice Manager application. Please follow all steps carefully to allow for the best experience. These instructions **do not** apply to CLOUD offices.

It is important for your office to review the Practice Manager and Clinical Release Notes to be aware of the new features and enhancements. The Release Notes are available on the www.sticomputer.com website. For Practice Manager, click Resources > Practice Manager > scroll to Downloads and select Release Notes. For Clinical, click Resources > Clinical > scroll to Downloads and select Release Notes.

Installation Instructions

You must run the upgrade on your application server and must be logged into the server as an administrator. Once you are logged into the application server as an administrator use the following steps to upgrade the ChartMaker Medical Suite.

1. Log into Practice Manager or Clinical.
2. After you have logged in, click **Help > ChartMaker Medical Suite Update.**



3. In the **URL Entry** section of the ChartMaker Medical Suite Update dialog, enter the upgrade **URL** (given by Customer Support). You then have the options to configure the **Download Scheduling** options and/or the **Automated Upgrade** options.
4. In the Download Scheduling section, you have the option to download the upgrade now (**Start download now**), or **Schedule download to start at** a configured date and time.

ChartMaker Medical Suite Update

Properties

Download Location

The ChartMaker Medical Suite update will be downloaded to this location on the STI Data Server.

Server Path: C:\ STIInstall\ChartMaker Medical Suite

URL Entry

Enter the URL given to you by customer support.

URL: URL obtained from Customer Support

Download Scheduling

The download can start immediately or be scheduled to start at a later date and time.

No download

Start download now

Schedule download to start at: 09/24/2020 10:06 AM

Automated Upgrade

Automated Upgrade Enabled: Disabled Enabled [Configure](#)

Upgrade Scheduled Time: Not Scheduled 09/24/2020 10:06 AM

Status of Last Update

Start Date: 07/31/2020 11:20 AM

Status: Extraction - Successful

Description: Complete

Comment: An icon to install the ChartMaker Medical Suite update has been placed on the server's desktop.

OK Cancel

5. In the Automated Upgrade section, you can enable an automated install of the upgrade, and schedule a date and time for the automated upgrade.

If you **DO NOT** want to use the automated feature, you can skip this section and go to step 12.

If you **DO** want to use the automated feature, in the Automated Upgrade Enabled field, select **Enabled**.

*****NOTE*****

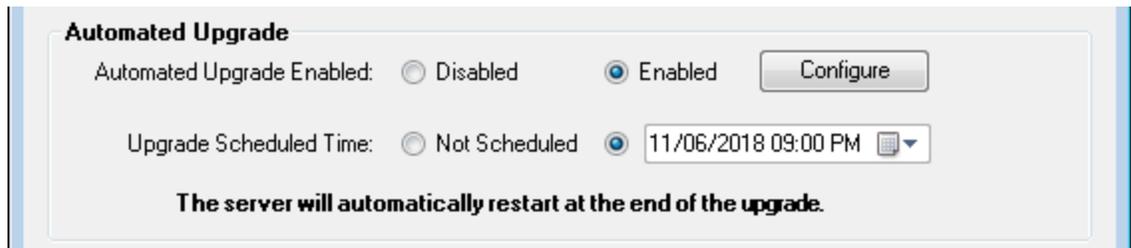
The server will automatically restart at the end of the upgrade when using the automatic upgrade option.

6. In the Upgrade Scheduled Time field, click the radio button next to the **Date/Time** drop-down, and configure the **Date** and **Time** you want the upgrade installation to start.

*****NOTE*****

If the Update Install Package needs to be downloaded, or is in the process of being downloaded, then the **Upgrade Scheduled Time** must be set at least 24 hours into the future if the **Start Download now** option was selected in the Download Scheduling section (Step 4 above); or, at least 24 hours later than the date and time configured in the **Schedule download to start at** field if scheduling the download, to ensure successful download of the Update Install Package.

7. Click the **Configure** button to access the Automated Upgrade Settings dialog and configure the upgrade options and email notifications to be used for the automated upgrade.



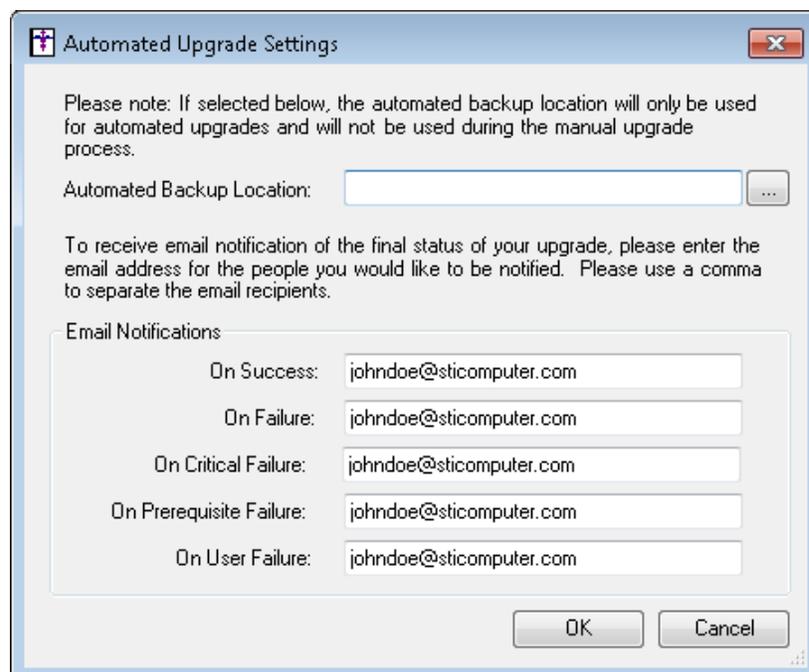
Automated Upgrade

Automated Upgrade Enabled: Disabled Enabled

Upgrade Scheduled Time: Not Scheduled 11/06/2018 09:00 PM

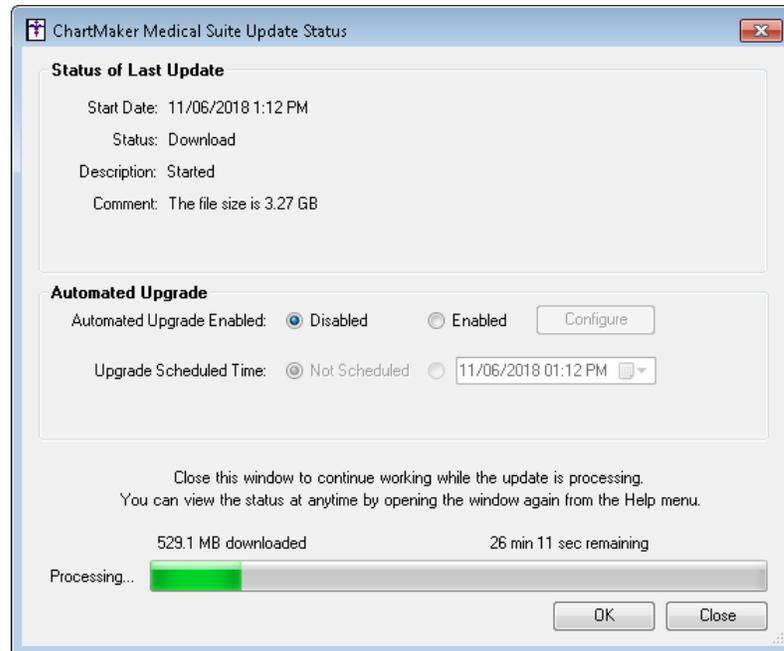
The server will automatically restart at the end of the upgrade.

8. In the **Alternate Backup Location** field, you can enter or browse to a specific location for the backup if you do not want to use the default backup location. It is recommended that you consult your hardware vendor prior to making any alternative changes to your backup location. If this field is left blank, the system will use the default backup location.
9. The **Email Notifications** section allows you to configure email addresses to notify various individuals about successes and failures of the update process:
 - **On Success:** an email will be sent to each address if the upgrade completes successfully.
 - **On Failure:** an email will be sent to each address if the upgrade fails during the upgrade process.
 - **On Critical Failure:** an email will be sent to each address if the upgrade fails during the upgrade process and the databases fail to roll back.
 - **On Prerequisite Failure:** an email will be sent to each address if the upgrade fails on one of the prerequisite checks (stoplights or other various checks performed before the process enters the actual upgrade).
 - **On User Failure:** an email will be sent to each address if an upgrade fails due to users still being logged into Clinical or Practice Manager.
10. When finished configuring the Automated Upgrade Settings, click the **OK** button to activate the changes. If you click the Cancel button, or close out of this screen without clicking OK, the changes will be discarded, and the previous setting will be kept.

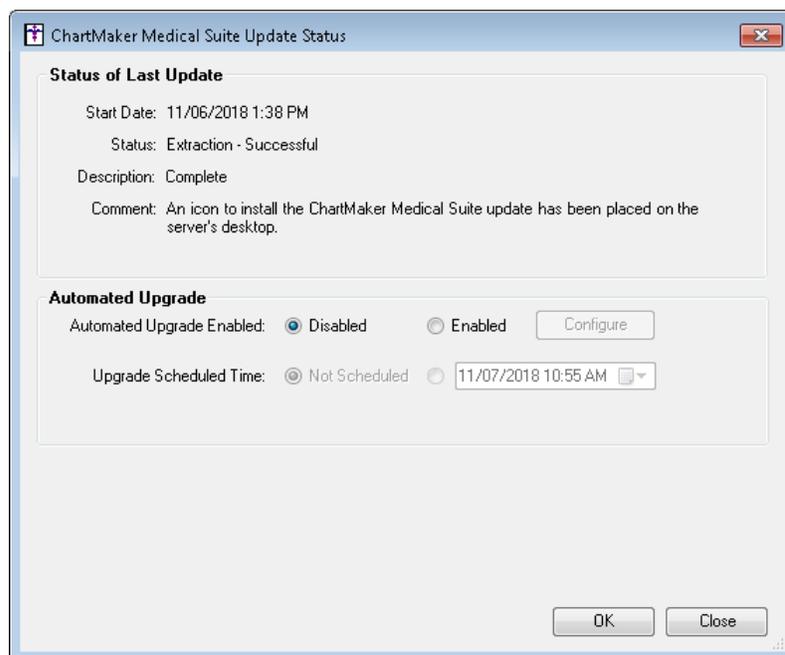


11. After the Automated Upgrade settings have been configured as desired, click the **OK** button. The system will then download and install the upgrade as configured in the Download Scheduling and Automated Upgrade sections. The system will generate any email messages regarding the upgrade process as configured in the Automated Upgrade Settings dialog.
12. If you are choosing not to use the Automated Upgrade, then after the URL has been entered and the Download Scheduling options have selected, click the **OK** button.

13. The ChartMaker Medical Suite Update Status dialog will appear outlining the download status. Click the **Close** button to run the download in the background.



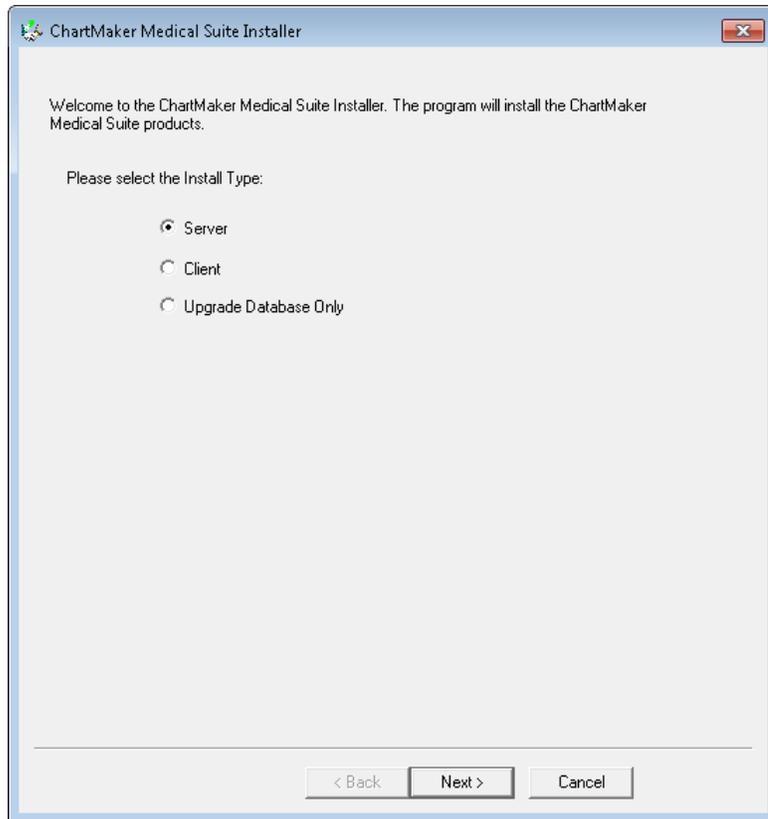
14. After the download is complete, click the **Close** button.



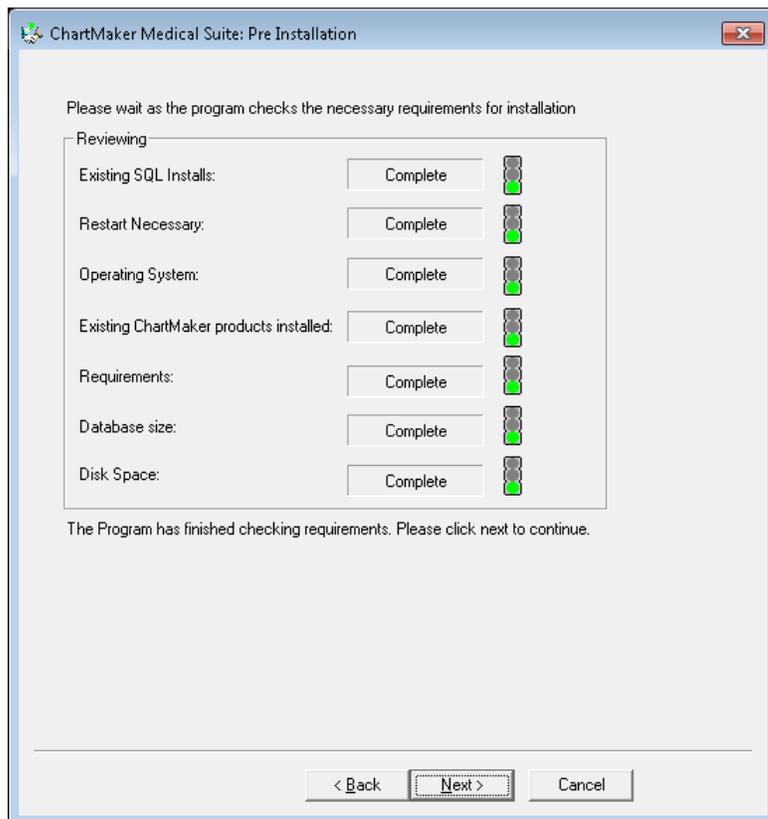
15. When the download is complete an Install ChartMaker Medical Suite icon will appear on the server's desktop. When you are ready to start the upgrade, double-click the **Install ChartMaker Medical Suite** icon.



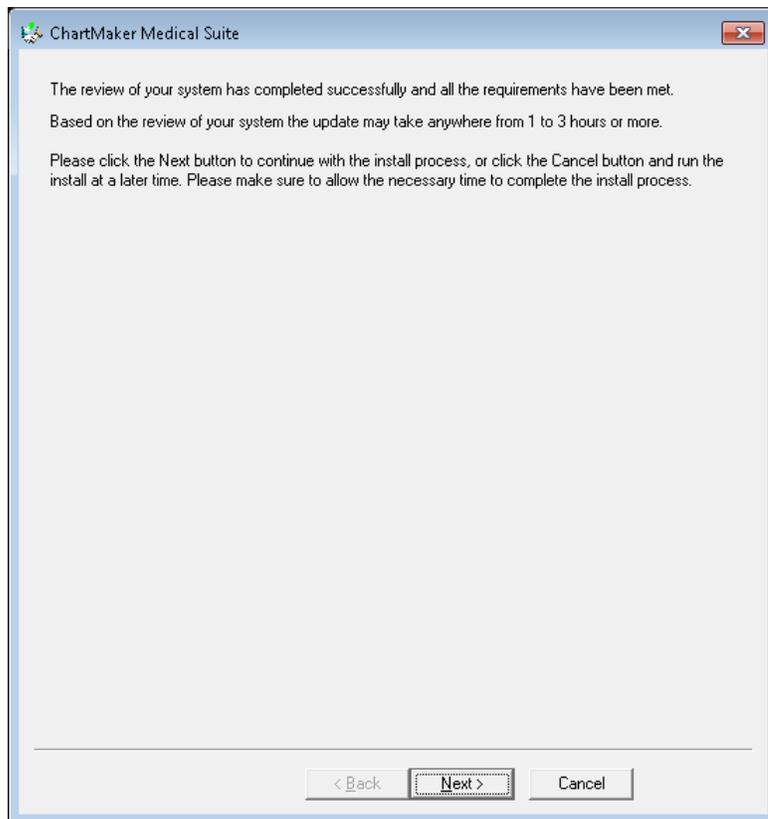
16. In the ChartMaker Medical Suite Installer dialog, the Install Type will default to **Server**. Click the **Next** button.



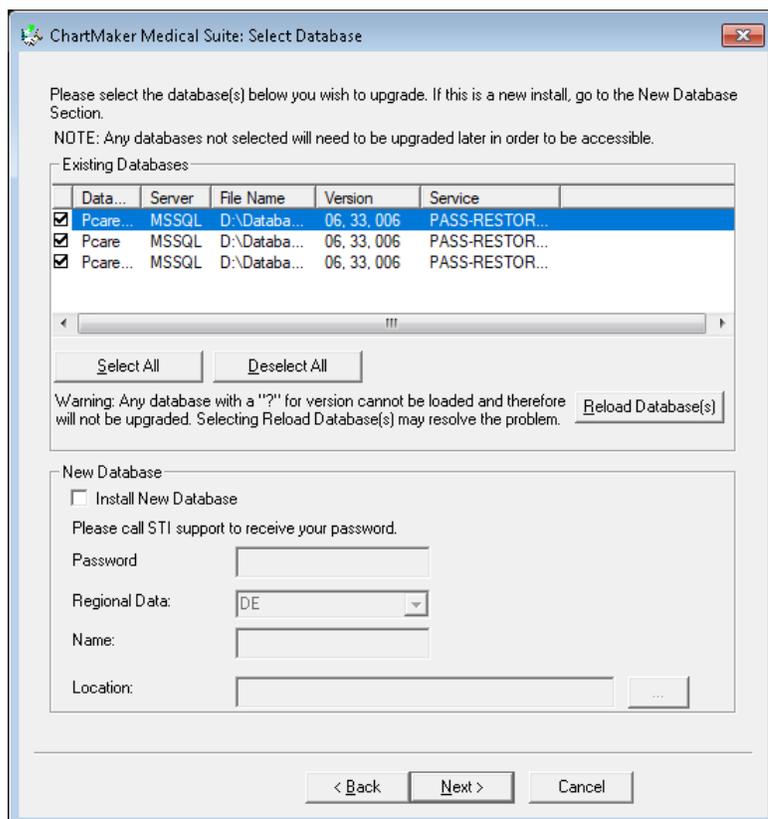
17. In the ChartMaker Medical Suite: Pre Installation dialog, click the **Next** button.



18. In the ChartMaker Medical Suite dialog, click the **Next** button.

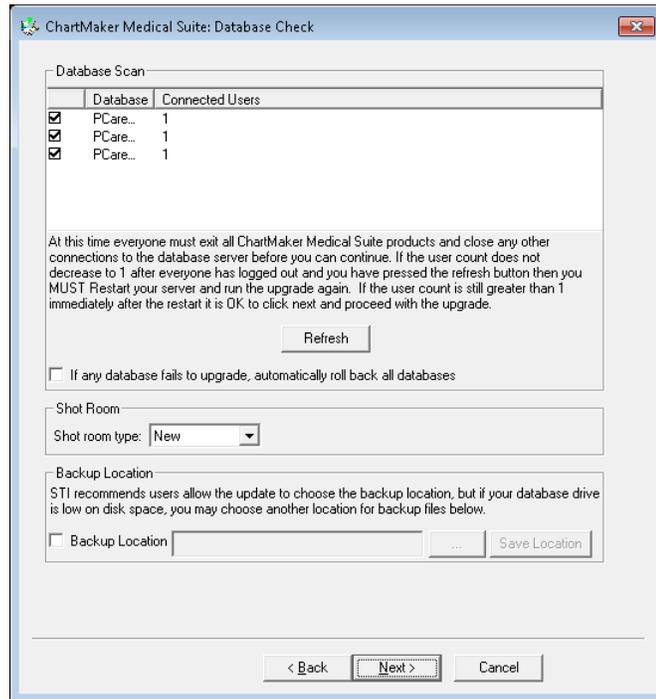


19. In the ChartMaker Medical Suite: Pre Installation dialog, click the **Select All** button if you have more than one database. If you have only one database, it will be checked. After the applicable databases have been selected, click the **Next** button.



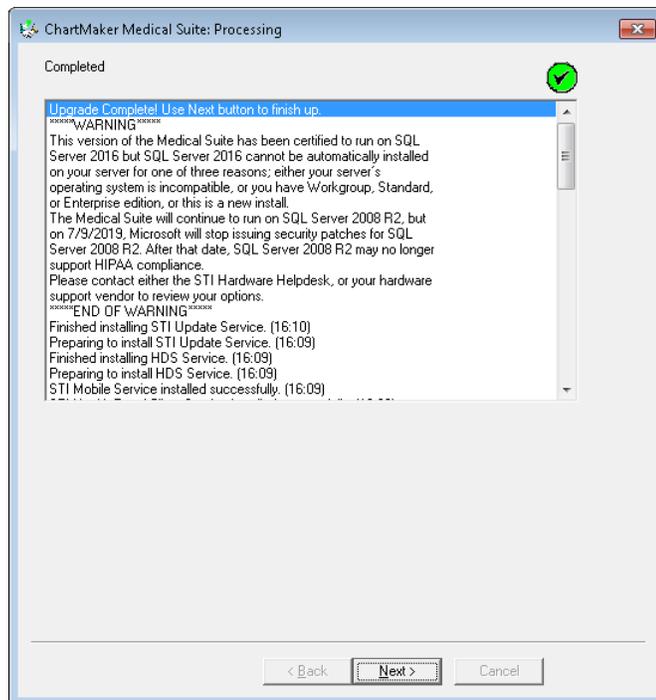
20. In the ChartMaker Medical Suite: Database Check dialog, click the **Next** button.

If the Connected Users for each database does not equal 1 you will be asked to reboot. Reboot the server and start the upgrade again. The upgrade will continue this time even if the Connected Users for each database does not equal 1.

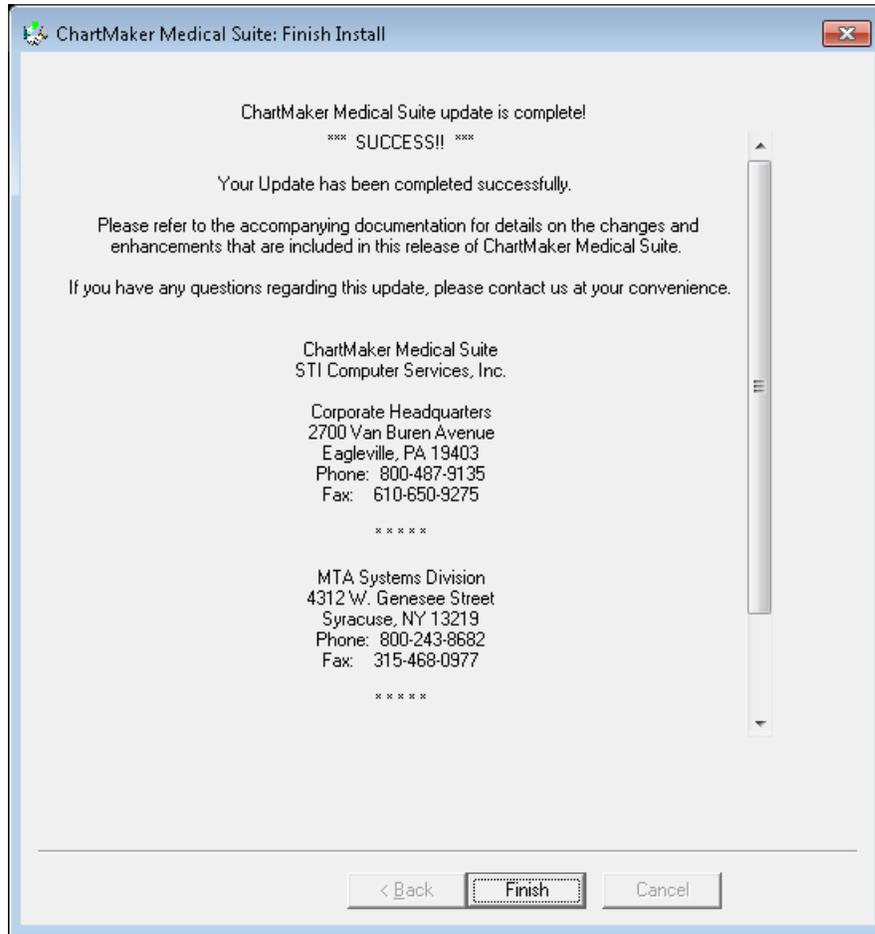


21. The upgrade will then begin. When the upgrade completes successfully you will see the **Green** circle with a Checkmark in the upper right corner. Click the **Next** button.

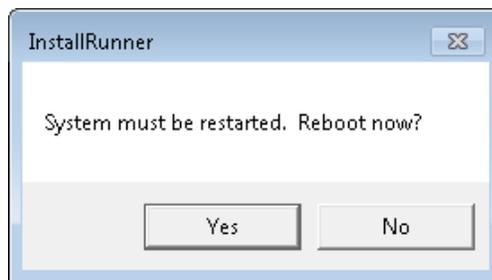
If the upgrade does not complete successfully the circle will be **Red** with an X in it. In this case click the **Next** button and the upgrade will roll back to your original version. Please do not attempt to run the upgrade again. Contact STI Software Support for assistance.



22. In the ChartMaker Medical Suite: Database Check dialog, click the **Finish** button.



23. In the InstallRunner dialog, click the **Yes** button to restart your server.



24. After the server has been restarted, you can log into the Clinical and Practice Manager applications on each workstation (right-click the **Practice Manager** and **Clinical** icon, and then click **Run as administrator**). The first time you log into each application a short client upgrade will run on the workstation. In Practice Manager, you will also need to run the Report Manager and register the Billing Components.

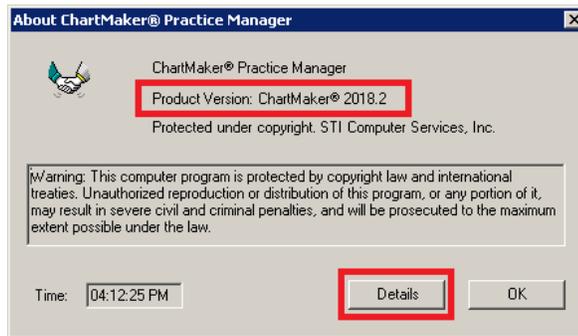
*****NOTE*****

If your office has a Terminal Server, you must reboot it, and then log into the Clinical and Practice Manager applications (right-click the **Practice Manager** and **Clinical** icon, and then click **Run as administrator**) to complete the upgrade.

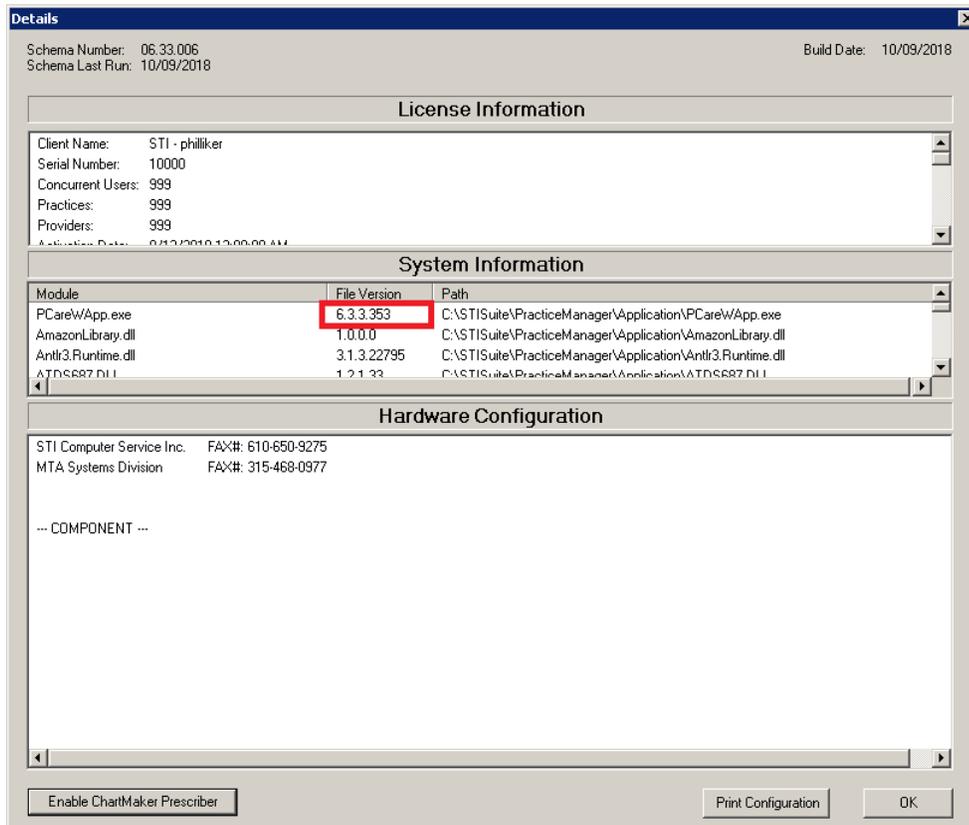
Practice Manager – After the Upgrade Is Complete

After the upgrade has completed, use the following steps to run the local upgrade for each workstation, verify the product version, run the Report Manager, and register the Billing Components.

1. Log into Practice Manager (right-click the **Practice Manager** icon, and then click **Run as administrator**) on any workstation using your normal Login and Password.
2. Practice Manager will run a local upgrade to the new version on **each workstation**.
3. After the local upgrade is installed, click **Help > About Practice Manager**.
4. In the About ChartMaker® Practice Manager dialog, verify that the **Product Version** matches the version you just installed, and then click the **Details** button.



5. In the Details dialog, look under the **System Information** heading and verify that the **File Version** for the **PcareWApp.exe** matches the file version you just installed. If the file version **does not** match, please call STI Practice Manager Support at **800-487-9135, option 1**. When finished, click the **OK** button.

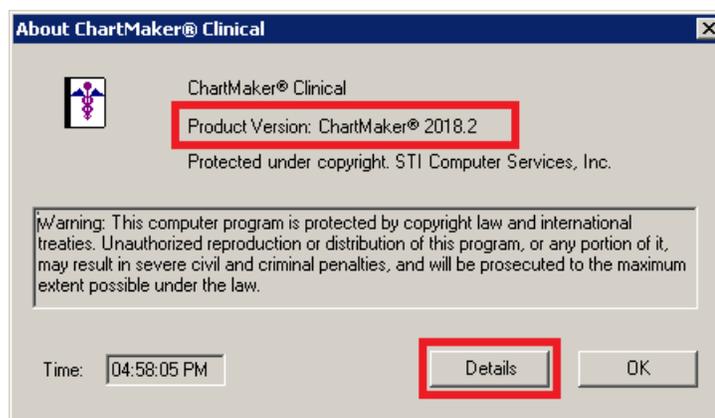


6. Click **Add-Ins > Reports > Report Manager**.
7. In The Report Manager dialog, check the **Show All Packages** option at the bottom-left of the dialog, and then click the >> button. This will move all the Available Packages to the Select Packages column.
8. Click the **OK** button. This will take anywhere from five to fifteen minutes to complete. When finished, a pop-up message will appear stating, "Report Package Import Complete." Click the **OK** button.
9. You now need to run Billing Component Manager on **each** workstation that is used to print paper claims or do electronic billing. Click **Add-Ins > Insurance Billing > Billing Component Manager**.
10. When the Practice Manager Billing Component Manager dialog appears, click the **OK** button.
11. Once the billing components have been registered, the Practice Manager Billing Component Manager dialog will automatically close. **Your upgrade is complete.**

Clinical - After the Upgrade Is Complete

After the upgrade has completed, use the following steps to run the local upgrade for each workstation and verify the product version. You only need to perform these steps if your office is using ChartMaker® Clinical.

1. Log into Clinical (right-click the **Clinical** icon, and then click **Run as administrator**) on any workstation using your normal Login and Password.
2. Clinical will run a local upgrade to the new version on **each workstation**.
3. After the local upgrade is installed, click **Help > About ChartMaker Clinical**.
4. In the About ChartMaker® Clinical dialog, verify that the **Product Version** matches the version you just installed, and then click the **Details** button.



5. In the Details dialog, look under the **System Information** heading and verify that the **File Version** for the **ChartMaker.exe** matches the file version you just installed. If the file version **does not** match, please call STI Practice Manager Support at **800-487-9135, option 1, then 2.**

When finished, click the **OK** button. **Your upgrade is complete.**

