

# **ChartMaker<sup>®</sup> Medical Suite Upgrade Instructions**

This document will guide you through the process of downloading and installing the ChartMaker<sup>®</sup> 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 <u>www.sticomputer.com</u> 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**.

200 A	G Practice Manager - Account Administra	Fictional Physicians (1) ation Print Add-Ins 1	JD - PCare To-Do (625*)	Hel	p ?		
	🕵 Patient 🚫 Chai	rge 🛛 💲 Payment 🛛 🧔 Inq	juire 🥵 Insu		Help Topics	pintment	🔜 Remittance
	Account #:	66 Practice	е:		About Practice Manager User Logon Status	ccess	Patient Reminde
	Salutation:				STI Website	D	)B: 7 /
	First:	Middle:			ChartMaker Medical Suite Update		
	Last:	Suffix:			Mar Status:	Emp Stat	us:

- 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:\ V 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.	
O No download	
Start download now	
O Schedule download to start at: 09/24/2020 □ ✓ 10:06 AM 🜲	
Automated Upgrade	
Automated Upgrade Enabled:      Disabled      Configure	
Upgrade Scheduled Time:  Not Scheduled  O9/24/2020 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 Cance	1

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	Configure
Upgrade Scheduled Time:	Not Scheduled	I1/06/201	8 09:00 PM
The server will auto	matically restart at	the end of the u	ipgrade.

- 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.

🕈 Automated Upgrade Settings	×
Please note: If selected below, the automated backup location for automated upgrades and will not be used during the manu process.	n will only be used al upgrade
Automated Backup Location:	
To receive email notification of the final status of your upgrade email address for the people you would like to be notified. Ple to separate the email recipients.	e, please enter the ease use a comma
Email Notifications	
On Success: johndoe@sticomputer.com	
On Failure: johndoe@sticomputer.com	
On Critical Failure: johndoe@sticomputer.com	
On Prerequisite Failure: johndoe@sticomputer.com	
On User Failure: johndoe@sticomputer.com	
OK	Cancel

- 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.

E	] ChartMaker N	Aedical Suite Upd	late Status			×
	Status of La	st Update				
	Start Date	e: 11/06/20181:1	2 PM			
	Status	:: Download				
	Description	: Started				
	Commen	t: The file size is 3.	27 GB			
	Automated U	pgrade				
	Automated l	Jpgrade Enabled:	Oisabled	🔘 Enabled	Configure	
	Upgrade	Scheduled Time:	Not Scheduled	0 11/06/201	8 01:12 PM 🔲 🔻	
	You	Close this wind can view the statu	ow to continue workin is at anytime by open	ng while the upd ing the window a	ate is processing. again from the Help menu.	
		529.1 MB downlo	aded	26 mir	n 11 sec remaining	
	Processing					
					OK Ck	ise

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

E	🖥 ChartMaker Me	edical Suite Upd	ate Status			×		
	Status of Last	Update						
	Start Date:	e: 11/06/2018 1:38 PM						
	Status: Extraction - Successful							
	Description:	Complete						
	Comment:	An icon to instal server's desktop	l the ChartMaker Mer	dical Suite updat	e has been placed on the			
	Automated Up	grade						
	Automated Up	pgrade Enabled:	Oisabled	🔘 Enabled	Configure			
	Upgrade 9	Scheduled Time:	Not Scheduled	0 11/07/20	18 10:55 AM 🔲 🔻			
					OK Cla	se		

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.

🍪 ChartMaker Medical Suite Installer	×
Welcome to the ChartMaker Medical Suite Installer. The program will install the ChartMaker Medical Suite products.	
Please select the Install Type:	
<ul> <li>Server</li> </ul>	
C Client	
C Upgrade Database Only	
< Back Next > Cancel	

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

Restart Necessary:	Complete	
Operating System:	Complete	
Existing ChartMaker products installed:	Complete	
Requirements:	Complete	-
Database size:	Complete	-
Disk Space:	Complete	
he Program has finished checking requirem	ients. Please click	: next to continue.

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

📩 ChartMaker Medical Suite 💽 💽
The review of your system has completed successfully and all the requirements have been met. Based on the review of your system the update may take anywhere from 1 to 3 hours or more.
Please click the Next button to continue with the install process, or click the Cancel button and run the install at a later time. Please make sure to allow the necessary time to complete the install process.
< <u>B</u> ack <u>Next&gt;</u> Cancel

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.

Plea Sec	ase select stion.	the databa	ase(s) below you	wish to upgrac	de. If this is a new inst	all, go to the New Databas		
Existing Databases								
	Data	Server	File Name	Version	Service			
	Pcare	MSSQL	D:\Databa	06, 33, 006	PASS-RESTOR			
₽	Pcare	MSSQL	D:\Databa	06, 33, 006	PASS-RESTOR			
	Pcare	MSSQL	D:\Databa	06, 33, 006	PASS-RESTOR			
•						•		
		Select All Deselect All						
	<u>S</u> elect	All	Deselect /	All				
 Wa	<u>S</u> elect arning: Anj	All / database	<u>D</u> eselect / with a "?" for v	All rersion cannot b	e loaded and therefo	re Beload Database(s)		
 Wa	<u>S</u> elect arning: Any Inot be up	All / database graded. So	Deselect / with a ''?'' for v electing Reload	All rersion cannot b Database(s) ma	e loaded and therefo ay resolve the problem	n. <u>R</u> eload Database(s)		
Wa will	<u>S</u> elect arning: Anj I not be up	All y database graded. So	<u>D</u> eselect / with a ''?'' for v electing Reload	All rersion cannot b Database(s) ma	pe loaded and therefo ay resolve the problem	re <u>R</u> eload Database(s)		
Wa will	<u>S</u> elect arning: Any I not be up ew Datab	All y database graded. So ase	Deselect / with a "?" for v electing Reload	All rersion cannot b Database(s) ma	e loaded and therefo ay resolve the problem	n. <u>R</u> eload Database(s)		
Wa will	<u>S</u> elect arning: Anj I not be up ew Datab	All graded. So ase New Datat	Deselect / with a ''?'' for v electing Reload	All rersion cannot b Database(s) ma	e loaded and therefo ay resolve the problem	re <u>R</u> eload Database(s)		
Wa will	<u>S</u> elect arning: An <u>i</u> I not be up ew Datab Install I Please cal	All y database graded. So ase New Datab I STI supp	Deselect / e with a "?" for v electing Reload	All rersion cannot b Database(s) ma	be loaded and therefo ay resolve the problem	re <u>R</u> eload Database(s)		
Wa will	<u>S</u> elect arning: An I not be up ew Datab Install I Please cal	All y database graded. So ase New Datat I STI supp	Deselect / e with a "?" for v electing Reload	All rersion cannot b Database(s) ma uur password.	be loaded and therefo ay resolve the problem	re <u>R</u> eload Database(s)		
Wa will F	Select arning: An <u>i</u> I not be up ew Datab Install I Please cal Password	All graded. So ase New Datat I STI supp	Deselect / with a "?" for v electing Reload	All Patabase(s) ma ur password.	e loaded and therefo ay resolve the problem	re <u>R</u> eload Database(s)		
Wa will F	Select arning: An I not be up ew Datab Install I Please cal Password Beginnal (	All graded. So ase New Datat ISTI supp	Deselect //	All Patabase(s) ma	e loaded and therefo ay resolve the problem	re <u>R</u> eload Database(s)		
Wa will	Select arning: Ang I not be up ew Datab I Install I Please cal Password Regional [	All y database ggraded. Sr ase Vew Datat I STI supp )ata:	Deselect //	All rersion cannot b Database(s) ma uur password.	e loaded and therefo ay resolve the problem	re <u>R</u> eload Database(s)		
Wa will F F	Select arning: Any not be up ew Datab. Install I Please cal Password Regional I Name:	All y database igraded. Si ase New Datat I STI supp )ata:	Deselect //	All Patabase(s) ma	e loaded and therefo ay resolve the problem	re <u>R</u> eload Database(s)		
Wa will F F F	Select arning: Any I not be up ew Datab. Install I Please cal Password Regional [ Name:	All y database graded. So ase New Datat I STI supp )ata:	Deselect //	All Database(s) ma uur password.	e loaded and therefo ay resolve the problem	re <u>R</u> eload Database(s)		
Wa will F F	Select arning: Any I not be up ew Datab. Install I Please cal Password Regional I Name: Location:	All y database graded. Sy ase New Datat I STI supp )ata:	Deselect //	All Database(s) ma ur password.	e loaded and therefo ay resolve the problem	re <u>R</u> eload Database(s)		
Wa will F F F	Select arning: Any I not be up ew Datab. Install I Please cal Password Regional I Name: Location:	All y database graded. Sr ase New Datat I STI supp Data:	Deselect //	All Database(s) ma	e loaded and therefo ay resolve the problem	re <u>R</u> eload Database(s)		

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.

PCare 1	
Z PCare 1	
PCare 1	
At this time everyone must exit all ChartMaker Medical Suite	e products and close any other
connections to the database server before you can continu	ie. If the user count does not
jecrease to 1 after everyone has logged out and you have will ST Restart your server and run the ungrade again. If th	pressed the refresh button then you rejuser count is still greater than 1
mmediately after the restart it is OK to click next and proces	ed with the upgrade.
Refresh	
If any database rails to upgrade, automatically roll back	ali databases
Shot Room	
Shet reem tupe:	
Shot room type: New	
Shot room type: New	
Shot room type: New  Backup Location STI recommends users allow the update to choose the bac	kup location, but if your database drive
Shot room type: New  Backup Location Sti recommends users allow the update to choose the bac bow on disk space, you may choose another location for I	kup location, but if your database drive backup files below.
Shot room type: New Backup Location STI recommends users allow the update to choose the bac is low on disk space, you may choose another location for l	skup location, but if your database drive backup files below.

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.

Completed Upgrade Completel Use Next button to finish up. WWARNING***** This version of the Medical Suite has been certified to run on SQL Server 2015 but SQL Server 2016 cannot be automatically installed on your server for one of three reasons; either your server's operating system is incompatible, or you have Workgroup, Standard, or Enterprise edition, or this is a new install. The Medical Suite will continue to run on SQL Server 2008 R2, but on 7/9/2019, Microsoft will stop issuing security patches for SQL Server 2008 R2, After that date, SQL Server 2008 R2 may no longer support HPAA compliance. Please contact either the STI Hardware Helpdesk, or your hardware support to review your options. ************************************	
Upgrade Complete! Use Next button to finish up. WARNING This version of the Medical Suite has been certified to run on SQL Server 2016 but SQL Server 2016 cannot be automatically installed on your server for one of three reasons; either your server's operating system is incompatible, or you have Workgroup, Standard, or Enterprise edition, or this is a new install. The Medical Suite will continue to run on SQL Server 2008 R2, but on 7/9/2019, Microsoft will stop issuing security patches for SQL Server 2008 R2. After that date, SQL Server 2008 R2 may no longer support HPAA compliance. Please contact either the STI Hardware Helpdesk, or your hardware support of to review your options. ************************************	
on your server tor one of three reasons; either your server's operating system is incompatible, or you have Workgroup, Standard, or Enterprise edition, or this is a new install. The Medical Suite will continue to run on SQL Server 2008 R2, but on 7/9/2019, Microsoft will stop issuing security patches for SQL Server 2008 R2. After that date, SQL Server 2008 R2 After that date, SQL Server 2008 R2 After that date, SQL Server 2008 R2 and the STI Hardware Helpdesk, or your hardware support HPAA compliance. Please contact either the STI Hardware Helpdesk, or your hardware support Vendor to review your options. """END OF WARNING"""" Finished installing STI Update Service. (16:10) Frieparing to install HDS Service. (16:09) Frieparing to install HDS Service. (16:09) STI Mobile Service installed successfully. (16:09)	

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

🖏 ChartMaker Medical Suite: Finish Install	<b>—</b> ×
ChartMaker Medical Suite update is complete! **** SUCCESS!! ****	*
Your Update has been completed successfully. Please refer to the accompanying documentation for details on the changes and enhancements that are included in this release of ChartMaker Medical Suite.	
If you have any questions regarding this update, please contact us at your convenience.	
ChartMaker Medical Suite STI Computer Services, Inc. Corporate Headquarters 2700 Van Buren Avenue Eagleville, PA 19403 Phone: 800-487-9135 Fax: 610-650-9275	Ξ
MTA Systems Division 4312 W. Genesee Street Syracuse, NY 13219 Phone: 800-243-8682 Fax: 315-468-0977	
****	Ŧ
< <u>B</u> ack <b>Finish</b> Cancel	

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

InstallRunner	23
System must be restarted. Reboot now?	
Yes No	

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.

About ChartMa	ker® Practice Manager
6	ChartMaker® Practice Manager
1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -	Product Version: ChartMaker® 2018.2
	Protected under copyright. STI Computer Services, Inc.
Warning: This treaties. Unaut may result in se extent possible	computer program is protected by copyright law and international horized reproduction or distribution of this program, or any portion of it, evere civil and criminal penalties, and will be prosecuted to the maximum under the law.
Time: 04:12	2:25 PM Details OK

 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 <u>does not</u> match, please call STI Practice Manager Support at 800-487-9135, option 1. When finished, click the OK button.

tails				
Schema Number: 06.33.006 Schema Last Run: 10/09/2018			Build Date:	10/09/2018
	Lice	ense Information		
Client Name: STI - philliker				
Serial Number: 10000				
Concurrent Users: 999				
Practices: 999				
Providers: 999				-1
A - K K D - K 0/10/2010 10:00:00 AM				
	Sys	stem Information		
Module	File Version	Path		▲
PCareWApp.exe	6.3.3.353	C:\STISuite\PracticeManager\Application\PCareWApp.exe		_
AmazonLibrary.dll	1.0.0.0	C:\STISuite\PracticeManager\Application\AmazonLibrary.dll		
Antir3.Runtime.dll	3.1.3.22795	C:\STISuite\PracticeManager\Application\Antlr3.Runtime.dll		
ATDS687 DI I	12122	C\STISuite\PracticeManager\Application\ATDS687.DLL		
	Hord	uere Configuration		
	пагол	ware Configuration		
STI Computer Service Inc. FAX#: 610-650-92	75			
MTA Systems Division FAX#: 315-468-09	77			
COMPONENT				
Enable ChartMaker Prescriber		Drint Configure	ation	OK
				0.0

### 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<sup>®</sup> 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 **<u>each workstation</u>**.
- 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.

About ChartMaker® Clinical			
*	ChartMaker® Clinical Product Version: ChartMaker® 2018.2 Protected under copyright. STI Computer Services, Inc.		
Warning: Th treaties. Una may result in extent possil	his computer program is protected by copyright law and international authorized reproduction or distribution of this program, or any portion of it, severe civil and criminal penalties, and will be prosecuted to the maximum ble under the law.		
Time: 04	:58:05 PM Details OK		

 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 <u>does not</u> 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.** 

Details				×		
Schema Number: 06.33.006 Schema Last Run: 10/09/2018			Build Date:	10/09/2018		
License Information						
Client Name: STI - philliker						
Serial Number: 10000						
Concurrent Users: 999						
Practices: 999						
Providers: 999				-		
L A structure Distant 0/10/2010 10:00:00 AM	Sve	stem Information				
Madula	File Version	Path				
ChartMaker eve	6 3 3 353	C\STISuite\Clinical\ChartMaker.eve				
	6.3.3.353	C:\STISuite\Clinical\AlertManager.dl				
Antra Buntime dll	31322795	C:\STISuite\Clinical\Antlr3 Buntime dll				
Audit ibraru dli	633353	PASTISuite/Clinical/AuditLibraru.dll				
<b>▲</b>						
	Hardy	ware Configuration				
STI Computer Service Inc. FAX#: 610-650-9275	5					
MTA Systems Division FAX#: 315-468-097	7					
COMPONENT						
•						
			,			
Enable ChartMaker Prescriber			Print Configuration	OK		