SpringCharts for Windows Installation Guide

S-011-1106

Contents

<u>**Warning**</u>**!**

<u>**Do not**</u> **proceed with these instructions if you are upgrading an existing installation of SpringCharts. Please contact your software reseller, or Spring Medical Systems for the SpringCharts upgrade instructions.**

Overview

SpringCharts is an electronic medical records software suite based on the latest industry standard Java technology. SpringCharts is available in two different system configurations: Single Computer, or Networking Option. The installation instructions vary slightly for the two configurations, and appear later in this guide.

WARNING: Because of the extensive changes in the custom vitals feature, ToDos, and chart alerts, Version 2011 will convert your data files. What this means is that you will not be able to revert back to Version 8 or 9, if you so desire. The only way to do so will be to restore from your last Version 8 or 9 backup.

System Requirements

The system requirements listed below are for SpringCharts running as the only application on the particular computer. Resource requirements need to be adjusted for additional applications that are running on the computer. Overall system requirements are:

- A Local Area Network using TCP/IP as the native protocol.

- A printer.

- Minimum monitor resolution of 800 x 600 (1024 x 768 recommended)

- To use the integrated Email functions, an Internet connection is required (T1, Cable, or DSL).

- A CD-ROM drive.

- Java Runtime Environment (JRE) 1.6_17 or later must be installed on all Windows, Mac or Linux computers which run SpringCharts. (See <u>Obtaining and installing the Java Runtime Environment</u> section below.)

  ➢ 140 MB of disk space is required for the JRE installation.

The minimum requirements for **SpringCharts Single Computer Version** are:

- 800 MHz, or faster, processor.

- 400 MB available disk space (after loading the JRE).

- 1 GB MB of memory (recommended).

- A computer running one of the following operating systems: Windows 2000 or above, or MacOS Tiger (10.6) or above.

- An activation key code and Version 2011 code. The first time SpringCharts is run, it must be activated with these two keys. These keys should have been received at the time of purchase. If not, please contact your sales representative.

The minimum <u>Server</u> requirements for **SpringCharts Networking Option** are:

- 800 MHz, or faster, processor.

- 400 MB available disk space (after loading the JRE).

- 2 GB of memory.

- Two or more computers running the following operating systems: Windows 2000 or above, or MacOS Tiger (10.6) or above.   (The computers do not need to be running the same operating system.)

- An activation key code and Version 2011 code. The first time SpringCharts is run, it must be activated with these two keys. These keys should have been received at the time of purchase. If not, please contact your sales representative.

The minimum <u>Client</u> requirements for **SpringCharts Networking Option** are:

- 800 MHZ, or faster, processor.

- 25 MB available disk space.

- 1 GB of memory.

- One or more computers running the following operating systems: Windows 2000 or above, or MacOS Tiger (10.6) or above.   (The computers do not need to be running the same operating system.)

Operating Environment Notice:

SpringCharts is an on-line system that requires uninterrupted access to a minimum level of system resources. As a result, it is recommended that the SpringCharts Server be located on a dedicated PC when possible (an exception is the database for the practice PMS program).

It is recommended that highly resource-intensive programs and/or programs that may intermittently use up the majority of system processing capacity or network bandwidth <u>not be run at the same time as SpringCharts</u>. Examples of these types of programs are:

- **Virus scans of the entire hard drive (scans of individual files are acceptable)**

- **Music streaming programs**
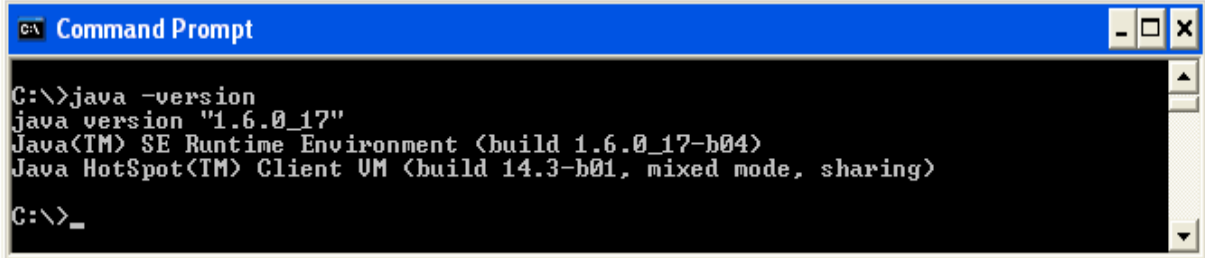
- **And certain backup programs (when activated)**

Please also note that additional programs running on the computers will increase the capacity and resources. Examples of these programs include:

- **Speech recognition programs**

- **Windows Terminal Services**

- **Billing Applications**

Obtaining and installing the Java Runtime Environment (JRE)

The Java Runtime Environment is distributed free of charge. Check to see if the computer already has the JRE installed, and if so, which version:

- Go to a command prompt (Click on **Start>Run**, type *cmd* into the text box, and click on **OK**). At the command prompt, type *java -version* and press **Enter**. There should be a space between "*java*" and "*-version*". The results should look like this:

If the JRE is not installed, or the version is older, it must be installed from the SpringCharts Installation CD:

- It may be necessary to log in to your computer as a user with administrator privileges.

- Put the SpringCharts Installation CD in the server's CD-ROM drive.

  Note: If you do not have a CD-ROM drive on your computer, there are two options. First, through Windows networking, share the CD-ROM drive on another computer connected to your network, and install off of that CD-ROM drive.

  The other method is to share a folder across your network and copy the installation files to that folder. Then, from your computer, access the shared

folder to install SpringCharts Server. In either case, it is advisable to consult your systems administrator for assistance.

- Go to the folder **\JRE Folder\JRE_Windows** on the SpringCharts Installation CD.

- Double-click on jre-6u17**-windows-i586-p.exe**

Installing SpringCharts Networking Option

SpringCharts Networking Option Installation Overview

The SpringCharts installation procedure has just a few easy steps: verify hardware requirements, ensure the JRE is at the correct version, install SpringCharts Server on the server, activate SpringCharts Server, install SpringCharts Client on all the client computers, and set the SpringCharts preferences. When these steps are completed successfully, you may begin using SpringCharts.

Installing SpringCharts Server (Networking Option) Details

Warning! Do not proceed with these instructions if you are upgrading an existing installation of SpringCharts. Please contact your software reseller, or Spring Medical Systems, for the SpringCharts Upgrade instructions.

To install SpringCharts Server (Networking Option):

1. Login to your operating system as a user with administrator privileges.

2. Put the SpringCharts Installation CD in the server's CD-ROM drive.

3. Locate the **SCServerSetup.exe** program on the SpringCharts Installation CD. It is located in the **New Installations\Windows Programs** folder.

4. Double-click on the **SCServerSetup.exe** program to launch the installation program. You should a screen similar to this:
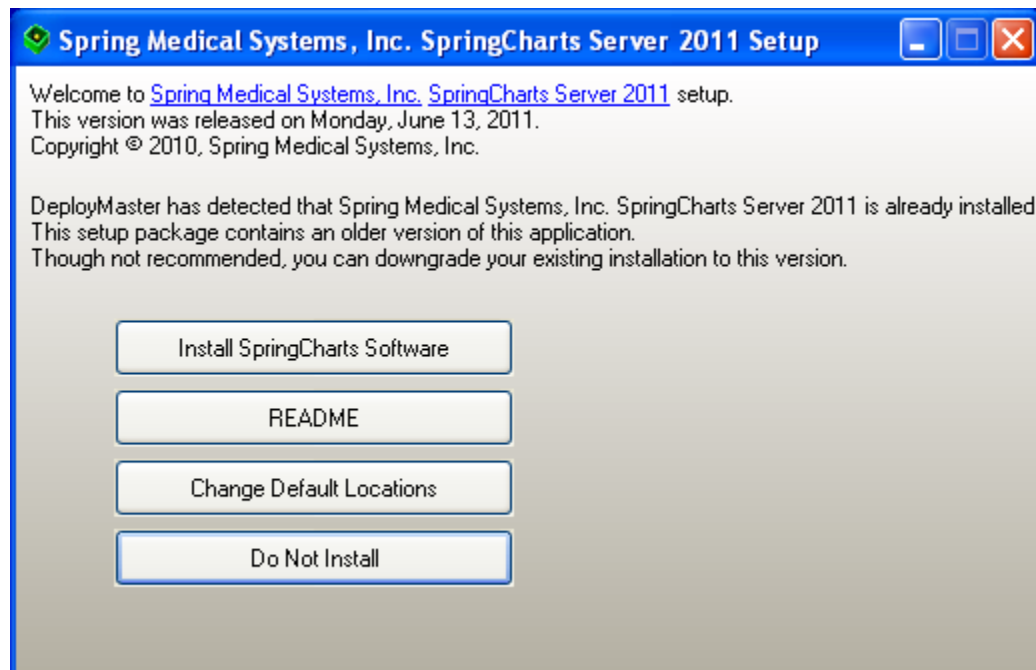
5. SpringCharts program files will be installed in the default location of **C:\Program Files\SCServer**. This is the recommended installation location for windows XP. To accept this default, simply click on the **Install SpringCharts Server Software** button.
"If you are installing on Windows Vista, Windows 7, or Windows server 2008 select <u>Change Default Locations</u>   and then change the path to <u>C:\SCServer</u> "

- If a different installation location other than the default is desired, click on the **Change Default Location** button. Enter the new locations, and click **Proceed**. Next (if the Default Location was changed), a list of the SpringCharts folders that will be installed is shown.   Click on **Proceed** to continue.

6. Read and accept the license agreement. The installation will begin at this point.

7. After the files have been successfully installed, the following screen will appear:
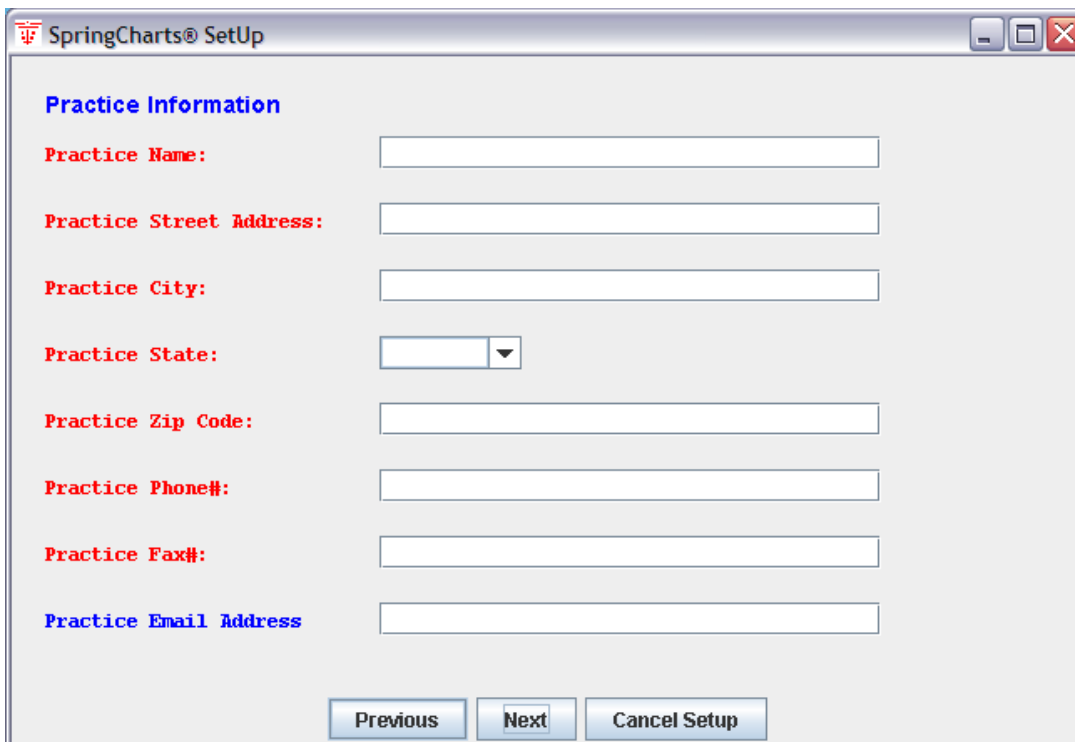
8. Click on **Thanks!** and the server installation is complete. Before the SpringCharts clients can begin running SpringCharts, the SpringCharts Server must be activated with your basic practice information. To activate the SpringCharts server, please see the **Activating SpringCharts Server** section immediately below.

Activating SpringCharts Server

1. Before activating the Networking Option, ensure that all SpringCharts Client programs are closed. To start the activation process:

   - Start SpringCharts Server. This can be done in one of two ways:

     ➢ Go to the folder where the SpringCharts Server software is installed (**C:\Program Files\SCServer** if the default location was used), and double-click on the **SpringChartsServer** application.

     ➢ Or, double-click on the **SpringChartsServer** desktop icon.

   - The first setup screen, shown below, lists some required information that is needed to complete the setup. After gathering this information, click on **Next**.
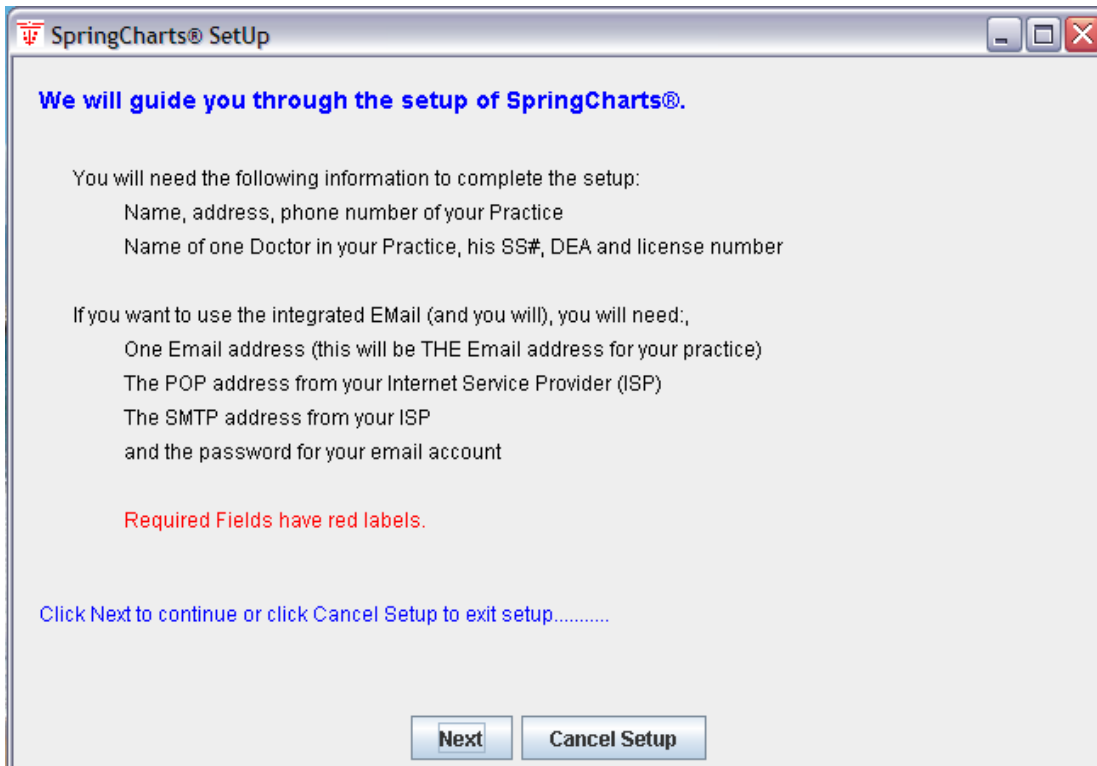
2. Enter your practice information. The practice name and practice zip code are critical, and must be EXACTLY the same name (including capitalization, spacing and punctuations) you used when you registered the software. Your activation key is based on your practice information.
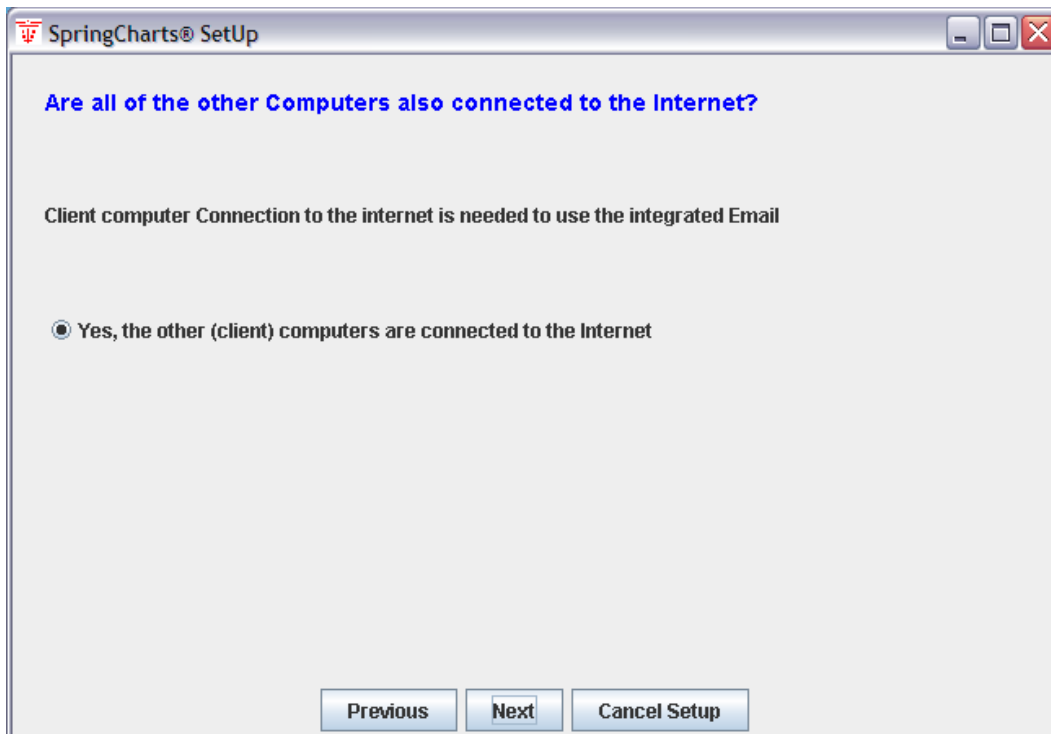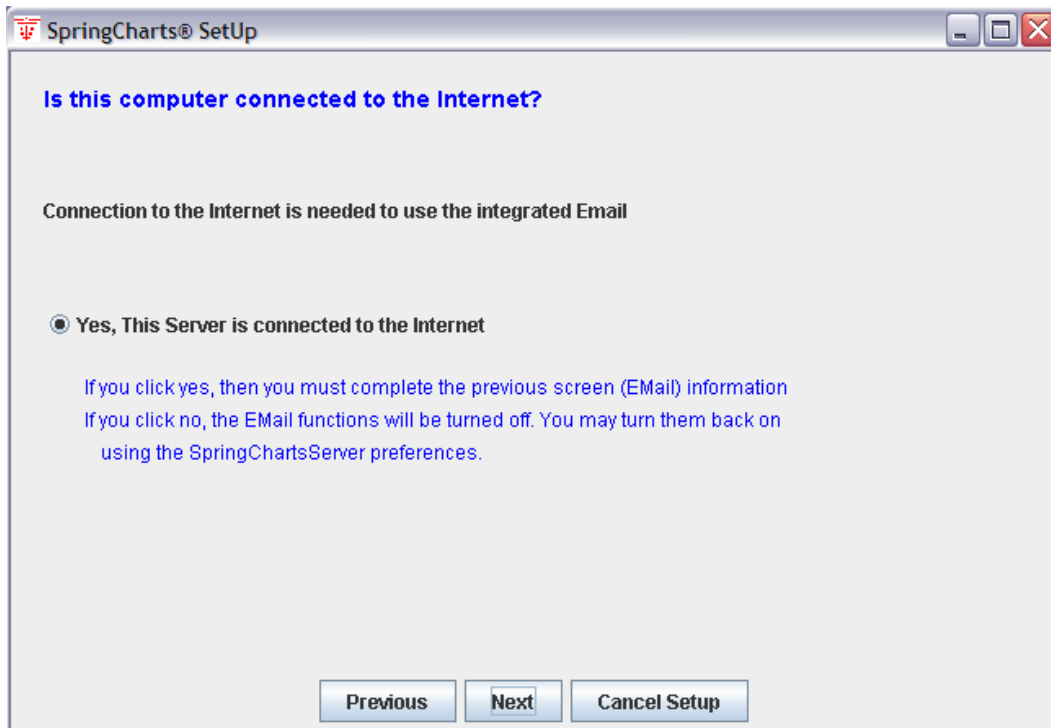
3. Enter your doctor information.

4. If you would like to use the email feature of SpringCharts, you will enter your email settings in the following window. This step can be skipped if the information is not available by following the onscreen instructions to deselect the radio buttons on the next two panels. Email can be setup at a later time from the administrator menu.
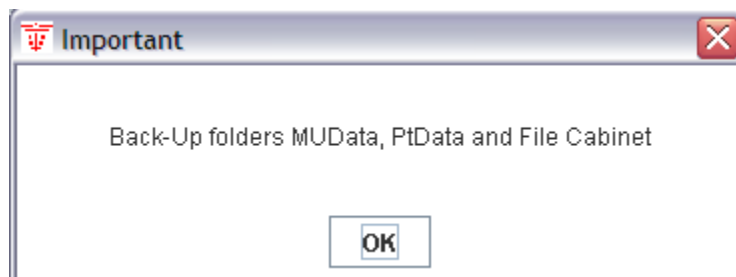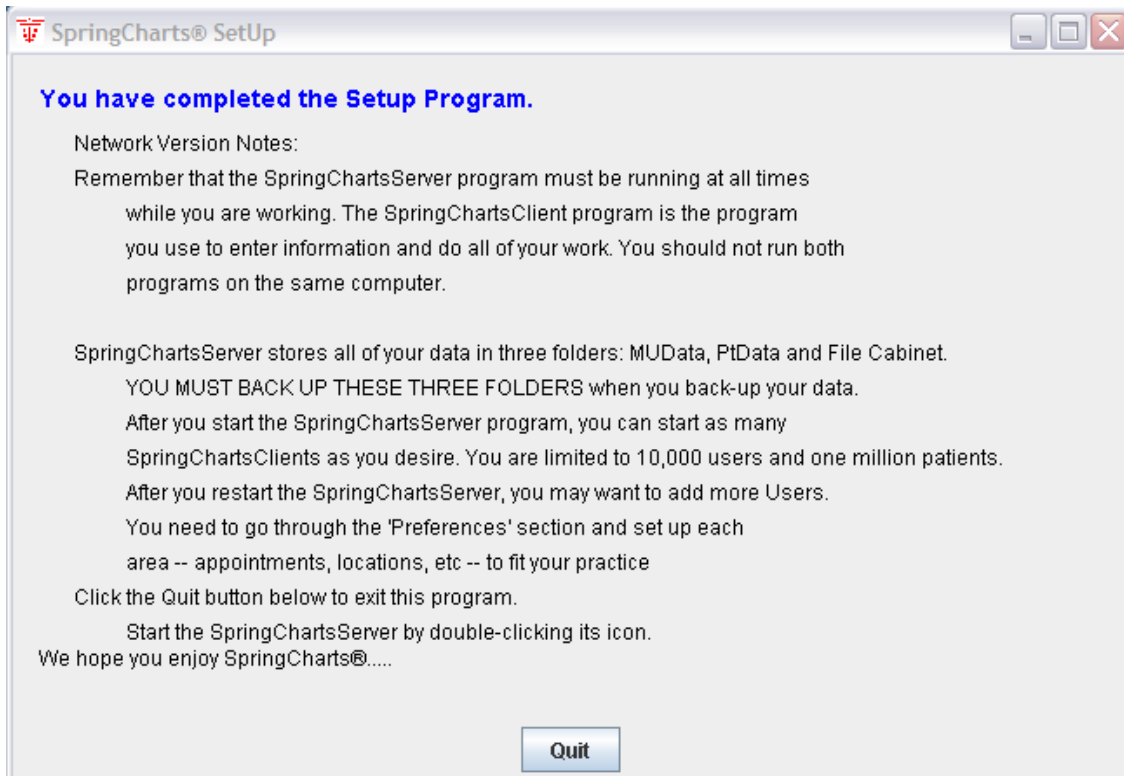
5. Enter your activation key.

6. Click **Finish** on the next screen.

7. If SpringCharts is successfully activated, the following two screens will appear. Click **OK** to back-up your data folders. Then click on **Quit** to end the setup program.

8. Your SpringCharts Server setup is almost complete. Double-click on the SpringCharts Server icon. SpringCharts Server will start up and tell you that SpringCharts Server must be restarted before you can access the system.
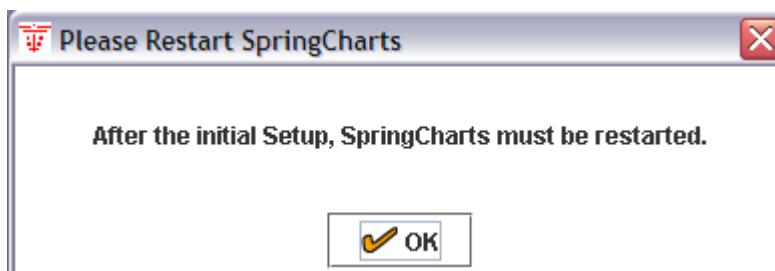
9. When you restart SpringCharts, it will ask you to enter your Falcon version key. Enter your key and press **OK**.

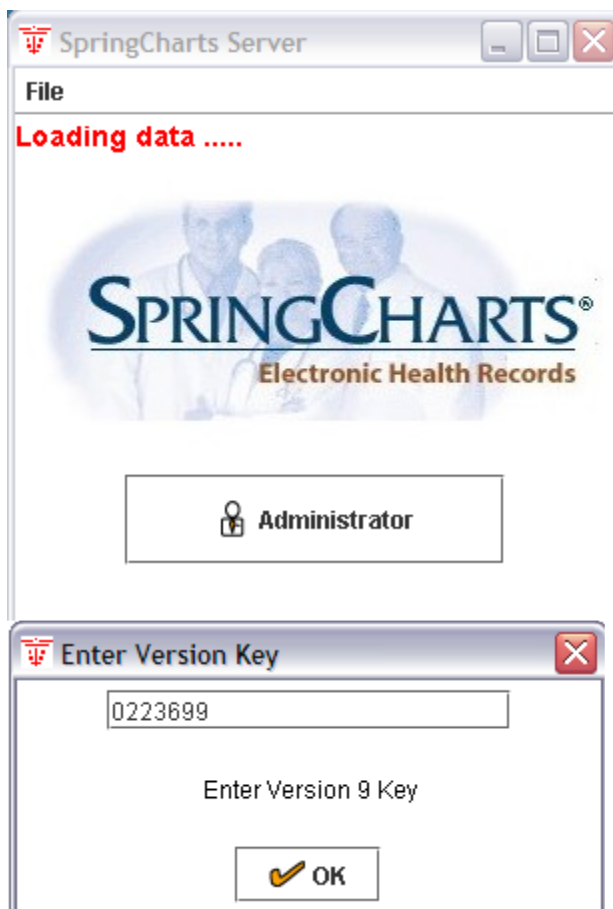10. Your SpringCharts Server installation is complete. Next, get the IP address of the server computer. To do this, double-click on the SpringCharts Server icon on your desktop. You may be prompted with **Do you have an Activation Key?** If you have already successfully activated the SpringCharts server, click on **Yes**. The IP address of the server can be found by selecting **File>SpringCharts Info** from the SpringCharts Server menu bar. The server's IP address will be at the bottom of the window. Make a note and save this IP address. It will be needed later to finalize the setup for each client.

You may now customize SpringCharts with your individual preferences. Please follow the steps in the section immediately below, **Setting up SpringCharts Preferences (Networking Option).**

Setting up SpringCharts Preferences (Networking Option)

Once SpringCharts is successfully installed and activated, it now can be customized for your individual medical practice. This involves setting various feature details, such as Users, Doctors, Email, Appointments, etc. Preferences are loaded onto each client computer when the SpringCharts Client is started. Changes made on the server are not seen by the user until the client is restarted.

1. Ensure that the SpringCharts Server is running.   If not, start SpringCharts Server on the server computer. Click on **Administrator**. The following main administration screen should appear:
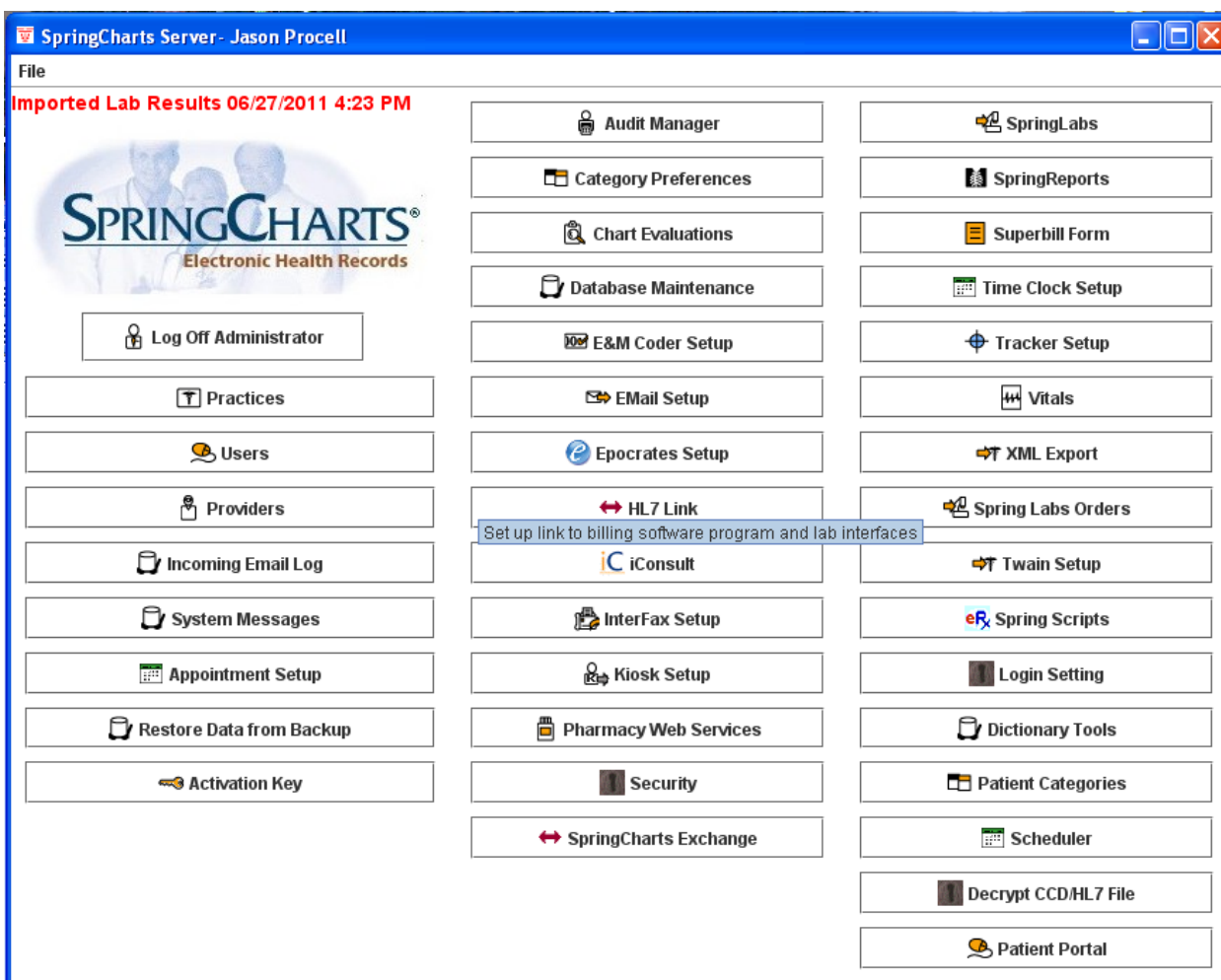
2. The **Doctors** button lets you enter additional doctors. One doctor was entered during activation, but additional doctors may be added here.

3. The **Users** button lets you add other users (nurses, PA's, clerks, etc.). The user names should be short as they are used throughout SpringCharts as part of the messaging system, and as login names. It is recommended that you use your users' initials as their user names.

    When a new user is created, the user's SpringCharts access levels are initially set. The access levels can be changed at any time by a SpringCharts administrator. To create a new user:

    a) On the server, start SpringCharts, and click on **Administrator**.

    b) Click on **Users**, and then **New User**. This window will pop up:

    c) Fill in the new name, password, initials, and signature.

    d) Select the user's access level. The **Role Manager** has several preconfigured settings to choose from or you can set access manually.

    e) Click on **Save** when finished.

    f) Select the practice to which this user will be assigned.

4. The SpringCharts system administrator should set some initial preferences before the SpringCharts clients begin running the software. Click the **Category Preferences** button to setup the different practice preferences. The following screen appears:
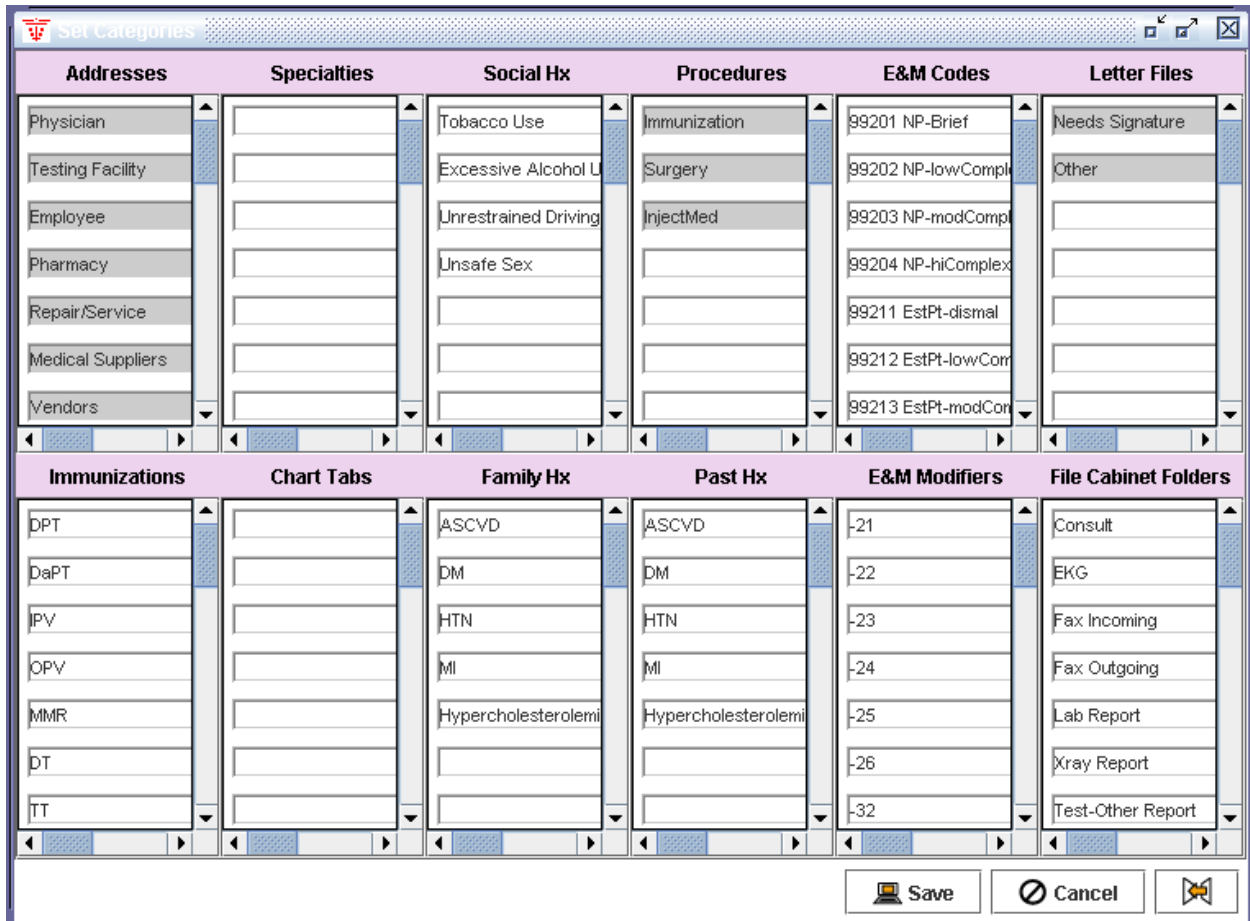
> **Addresses**. Enter the address book categories. You can search the address book for things like Plumbers, Doctor's Friends, or whatever categories you choose to add. Some default categories are permanent like Physician and Pharmacy. This is because the program uses these categories in other locations. If you enter frequently called pharmacies into the address book, then from the messaging system, you can hit the **Pharmacies** button and choose from the list of pharmacies you have entered.

> **Specialties**. Set the address book specialties. This allows you to create keywords to your address book entries to allow you to create subsets when searching the address book.

➢ **Social History**. These phrases are available in the face sheet and are useful for rapid entry when entering a patient's social history. Examples include: Smokes Tobacco, Excessive Alcohol, and Unprotected Sex.

➢ **Procedures**. Some categories are preset, like Immunizations, Surgery, and InjectMed. But, you can define others, like Casting, Minor Surgery, etc. Procedures allow for speedy and consistent data entry into the patient's chart.

➢ **E&M Codes**. These are your most frequent office visit code preferences. These codes will go into a dropdown menu for rapid entry on routing slips.

➢ **Letter Files**. When you write a letter that concerns a patient, it is charted in his/her patient record. When you write letters you want to keep, but do not concern a patient's medical health, they are stored here under any name you choose. Examples of these letters include complaints to a hospital, letters to the editor, etc.

➢ **Immunizations**. Add the names of the immunizations you most frequently administer.

➢ **Chart Tabs**. Create custom tabs (new sections) for patient charts.

➢ **Family Hx**. Set family history phrases that are available in the face sheet and are useful for rapid entry when entering a patient's family history. Examples include: ASCVD, DM, HTN, MI, or Hypercholesterolemia.

➢ **Past Hx**. Set past history phrases that are available in the face sheet and are useful for rapid entry when entering a patient's history. Examples include: ASCVD, DM, HTN, MI, or Hypercholesterolemia.

➢ **E&M Modifiers.** Set your E&M modifiers.

➢ **File Cabinet Folders**. Edit the list of File Cabinet folders.

5. Close the **Set Categories** screen and click on **Appointment Setup**. You must define the doctor's weekly appointment schedule. The following screen appears asking whether you want to setup a doctor's schedule or a non-doctor's schedule.
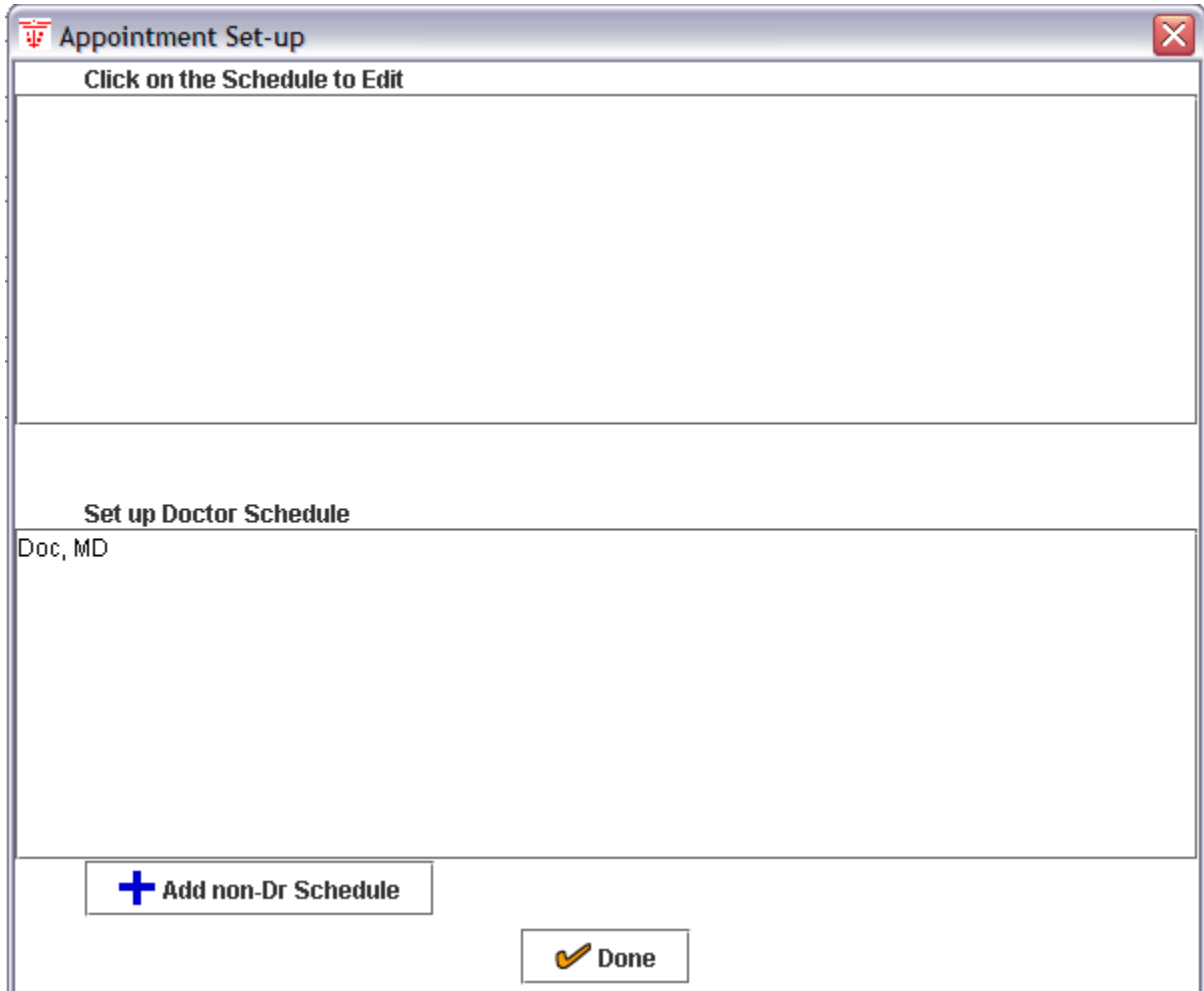
Click on the doctor's initials to create the schedule for the doctor or click on **Add non-Dr Schedule** to create a schedule for other things or resources. For example, you can set a schedule for a resource like a cast room, a nurse's shot schedule, a PA schedule, or for a second or double booking for a doctor or nurse.

Choose the interval for the appointments, the days, and the times during the day that each of these resources is available.

6. **Email Setup**. Skip this step if you entered this information during the setup, or if you do not intend to use email from within SpringCharts. This program simply downloads all of your email from your email account into this program. If a patient has given you his/her email address, and he/she sends you an email, the messaging system will pull the patient chart for you, and will chart your correspondence. The email system is, for security reasons, a **text-only** system. Anything in an email that is not text, like attachments, viruses, etc., is removed before entering the system. Also, in order for the email system to work properly, your email must be received from a POP server. Therefore, the email system will not work if you get your mail from AOL, Yahoo, or Hotmail (and other non-Pop server based email systems).

7. **Chart Evaluations**. This is a powerful feature of the program. Screening data can be entered to check each chart as it is pulled up. For instance, you can enter criteria like: all females age 35-40 should have one mammogram, or all females over age 40 should have a mammogram every 2 years, etc. Click the **Chart Evaluations** button. The following screen appears. Then click **New** to create a new evaluation.

8. The **Database Maintenance** button allows you to verify that the SpringCharts databases are accessible.

9. **Activation Key** allows you to change your activation key if you purchase additional feature packs or enter a new activation key if your practice information changes such as your location or telephone area code.

10. **Manage CPT Dictionary.**   The full set of AMA CPT® codes comes with SpringCharts. Use of this feature in the future will allow you to load new or updated CPT codes.

11. **Audit Manager**. Allows you to run user activity reports.

12. **HL7 Link**. This button is used to set up the software link between SpringCharts and PMS (Practice Management Software) or medical laboratories.

PMS tab**:** link to Practice Management Software. Before beginning this step, Medisoft or Lytec, and Per-Se Medical Connect must already be installed and set up. Click on **HL7 Link** and you will see this screen:
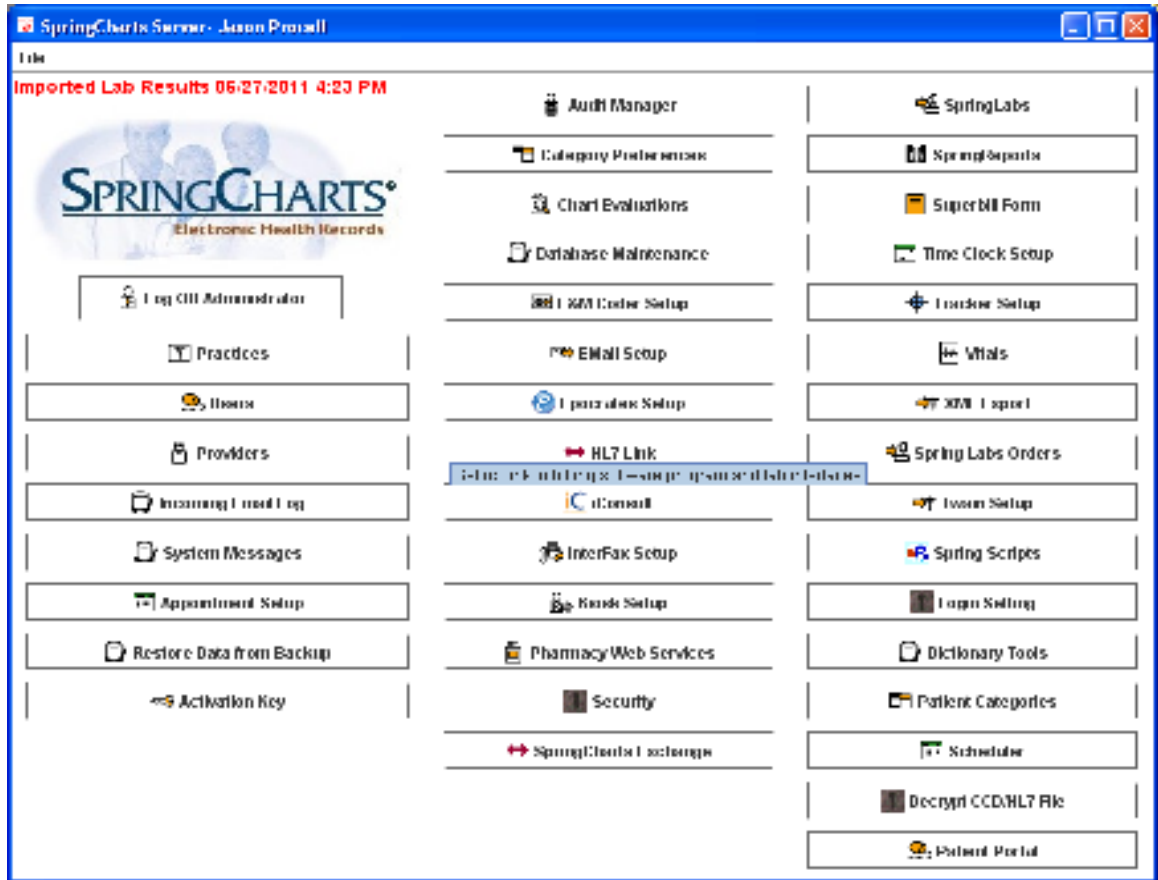

Enter the correct setup information to configure the link. Additional help on this setup can be found in a SpringCharts online tutorial.

Lab tab: From here, you can activate a results only interface with LabCorp, Quest, Spectrum or other labs.
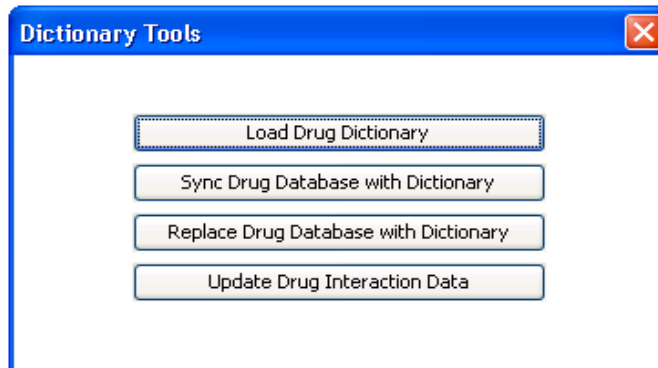
13. **E&M Coder Setup.** The E&M Coder will extract data by keywords from the patient encounter to assist in determining E&M codes. Some keywords come predefined in SpringCharts. But you may use this feature to edit the keywords.

14. **Superbill Form.** Modify the Superbill so that it is customized for your practice.

15. **Time Clock Setup.** The time clock is not visible unless enabled here.

16. **Vitals**. Add custom fields into the vitals screen.

17. **Dictionary Tools.** Dictionary tools allows you to load the FDA Drug Database.

From your server administration screen, go to Dictionary Tools.

Click on Load Drug Dictionary (Note: if you do not subscribe to the SpringCharts Drug Interaction Feature Pack, you will not have access to the 4th button on your screen.)

(If you are using Drug Interaction Feature Pack you will need to update this periodically.)

On the following screen you will have several options for synchronizing your current drugs with the new master file.

Option 1 - Replace Active Drug Database: This will replace your current active drug database with the FDA database.

Option 2 - Activate Dictionary After Sync: This option will update your current drugs in your active drug database and add in all other drugs from the new master drug file that couldn't be matched.

Note: Option 1 and Option 2 is an OR condition. You can either select one of them or neither of them.

Option 3 - Load Drugs From FDA: If you **don't select either check box** (Option 1 or 2) and only click this button, the sync process will be proceed. In this process, only the currently activated drugs will be update with the drugs from the new master file.

Click on Load Drugs from FDA. The loading and synchronizing process could take several hours, so please be patient.

During this process, do not use SpringCharts. Once this process is complete, you are ready to go.

If you are also using the SpringCharts Drug Interaction program in addition to SpringScripts, please call the Spring Medical Support Line to get further instructions

Installing SpringCharts Client (Networking Option) Details

<u>Warning</u>!

<u>Do not</u> **proceed with these instructions if you are upgrading an existing installation of SpringCharts. Please contact your software reseller, or Spring Medical Systems, for the SpringCharts upgrade instructions.**

To install SpringCharts Client (Networking Option):

1. Login to your operating system as a user with administrator privileges.

2. Put the SpringCharts Installation CD in the CD-ROM drive on the client machine.

3. Locate the **SCClientSetup.exe** program on the SpringCharts Installation CD. It is located in the **New Installations\Windows Programs** folder.

4. Double-click on the **SCClientSetup.exe** program to launch the installation program. You will see a screen similar to this:
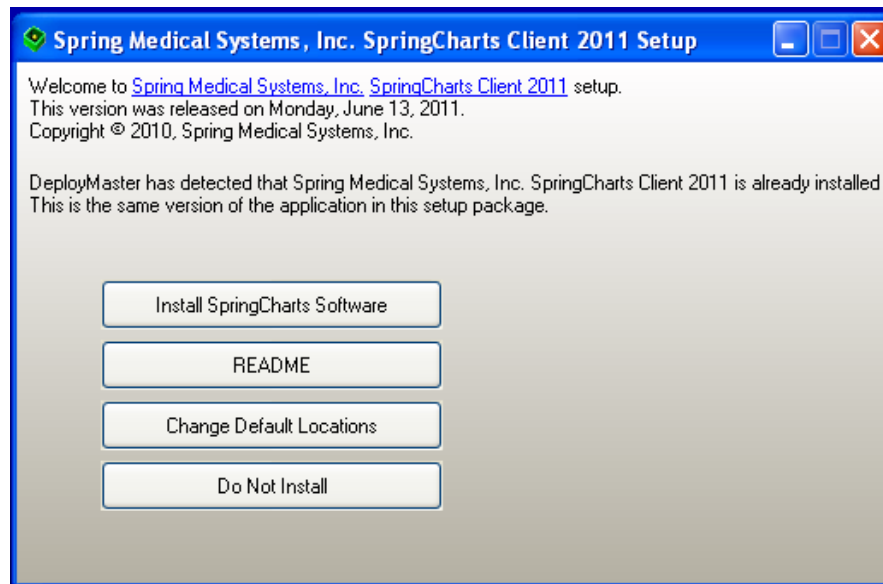

5. SpringCharts program files will be installed in the default location of **C:\Program Files\SCClient**. This is the recommended installation location for Windows XP. To accept this default, simply click on the **Install SpringCharts Client Software** button.

    "If you are installing on Windows Vista, Windows 7, or Windows server 2008 select <u>Change Default Locations</u> and then change the path to <u>C:\SClient</u> "

    - If a different installation location other than the default is desired, click on the **Change Default Locations** button. Enter the new locations, and click **Proceed**.

Next (if the default locations were changed), a list of the SpringCharts folders that will be installed is shown.   Click on **Proceed** to continue.

6. Read and accept the license agreement. The installation will begin running at this point.

7. After the files have been successfully installed, a final screen will appear:
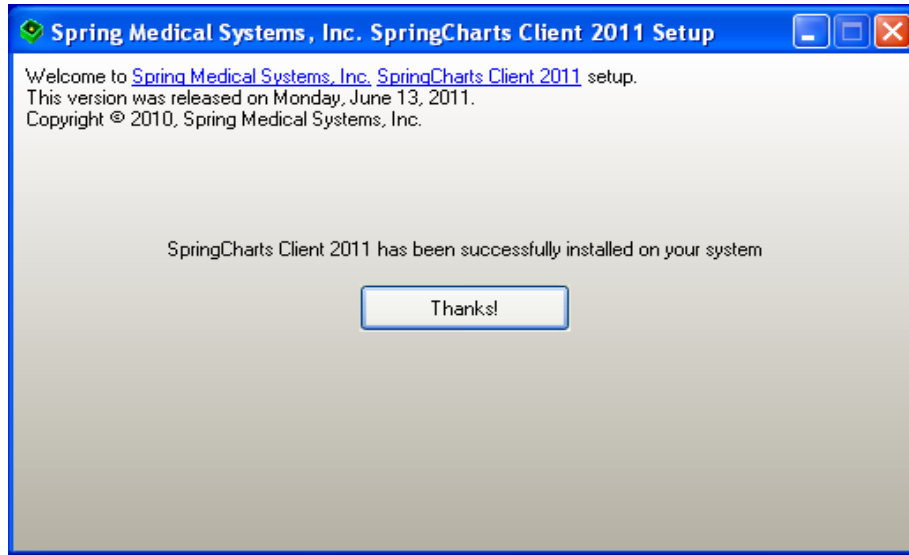
8. Click on **Thanks!** and the client installation is complete. Before the SpringCharts clients can begin running SpringCharts, the SpringCharts Server must be activated with your basic practice information. If this was not already completed immediately following the server installation, activate SpringCharts on the server at this time. (see **Activating SpringCharts Server**)

9. When SpringCharts Client is run for the first time, the client will ask you to enter the IP address for the server. The IP address of the server can be found by going to the server and selecting **File>SpringCharts Info** from the SpringCharts main menu bar. The server's IP address will be at the bottom of the window. Enter this IP address into the client. From then on, the client will remember the location of the server. <u>Note</u>: If the client and server are being installed and run on the same computer, then you will not be asked for the IP address of the server

Installing SpringCharts Single Computer Version

SpringCharts Single Computer Version Installation Overview

The SpringCharts installation procedure has just a few easy steps: verify hardware requirements, ensure the JRE is at the correct version, install SpringCharts, activate SpringCharts, and set the SpringCharts preferences. When these steps are completed successfully, you may begin using SpringCharts.

Installing SpringCharts Single Computer Version Details

Warning!

Do not proceed with these instructions if you are upgrading an existing installation of SpringCharts. Please contact your software reseller or Spring Medical Systems for the SpringCharts upgrade instructions.

To install SpringCharts Single Computer Version:

1. Login to your operating system as a user with administrator privileges.

2. Put the SpringCharts Installation CD in the computer's CD-ROM drive.

3. Locate the **SCSCVSetup.exe** program on the SpringCharts Installation CD. It is located in the **New Installations\Windows Programs** folder.

4. Double-click on the **SCSCVSetup.exe** program to launch the installation program.   You will see a screen similar to this:
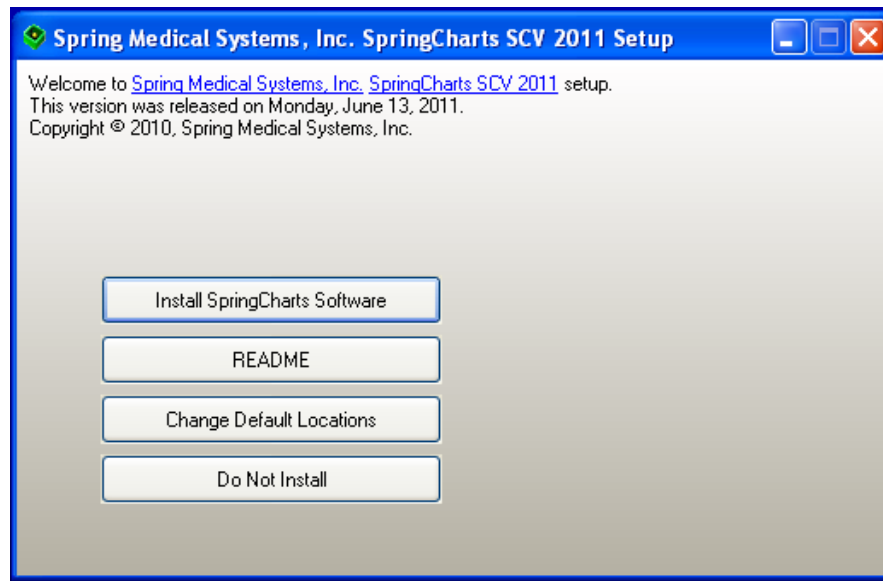
5. SpringCharts program files will be installed in the default location of **C:\Program Files\SCharts**. This is the recommended installation location for windows XP. To accept this default, simply click on the **Install SpringCharts SCV Software** button.

"**If you are installing on Windows Vista, Windows 7, or Windows server 2008 select <u>Change Default Locations</u>   and then change the path to <u>C:\SCharts</u>**"

- If a different installation location other than the default is desired, click on the **Change Default Locations** button. Enter the new locations, and click **Proceed**.   Next (if the default location was changed), a list of the SpringCharts folders that will be installed is shown.   Click on **Proceed** to continue.

6. Read and accept the license agreement. The installation will begin running at this point.

7. After the files have been successfully installed, a final screen will appear:
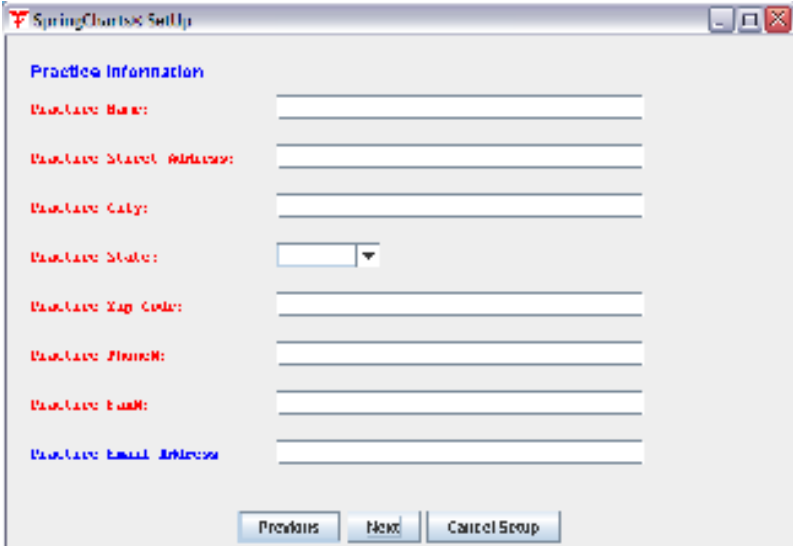

8. Click on **Thanks!** and the installation is complete. Before SpringCharts can begin running, it must be activated with your basic practice information. To activate SpringCharts, please see the **Activating SpringCharts** section.

Activating SpringCharts

1. To start the activation process:

   - Start SpringCharts. This can be done in one of two ways:

     ➢ Go to the folder where the SpringCharts software is installed (**C:\Program Files\SCharts** if the default location was used), and double-click on the SpringCharts application.

     ➢ Or, double-click on the SpringCharts desktop icon.

   - The first Setup screen, shown below, lists some required information that is needed to complete the setup. After gathering this information, click on **Next**.
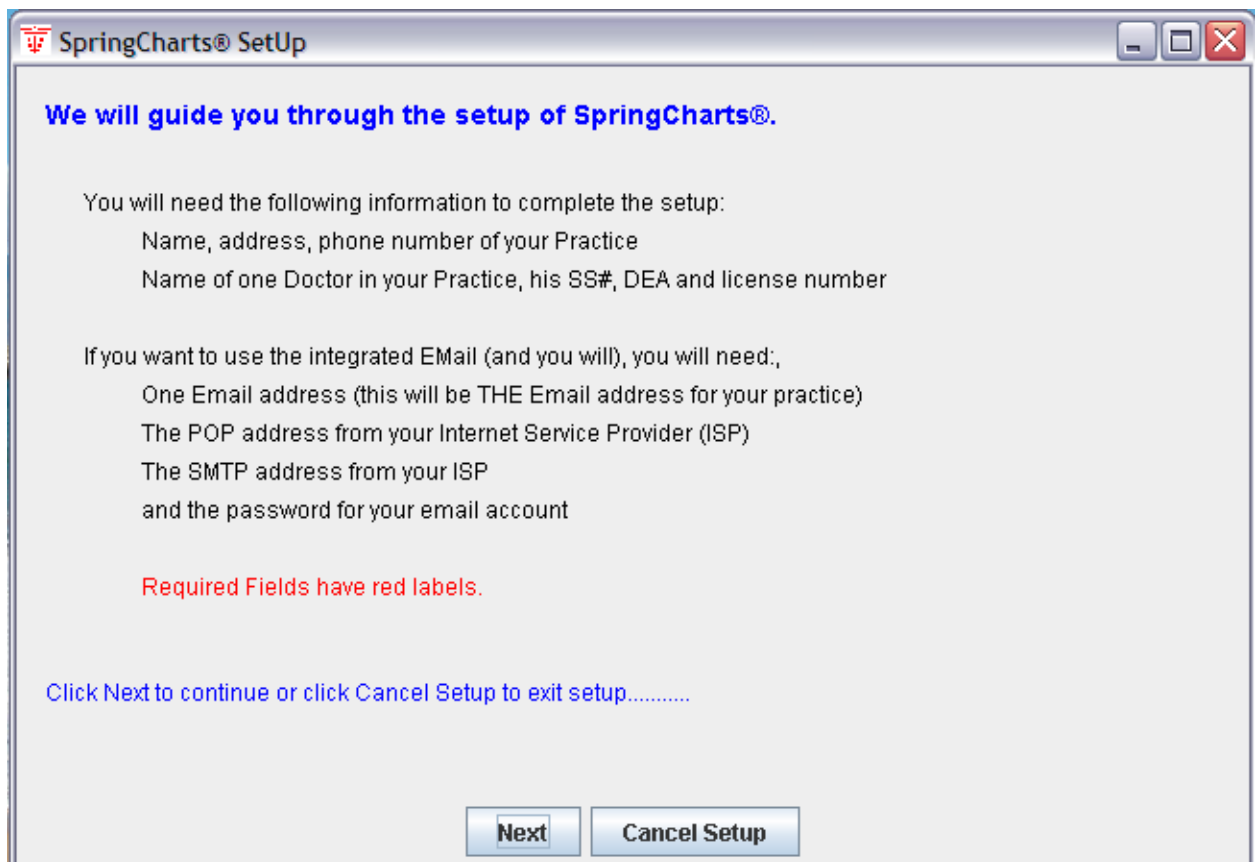
2. Enter your practice information. The practice Name and Zip Code are critical and must be EXACTLY *(including capitalization, spacing, and punctuation)* the same you used when you registered the software. Your activation key is based on your practice information.
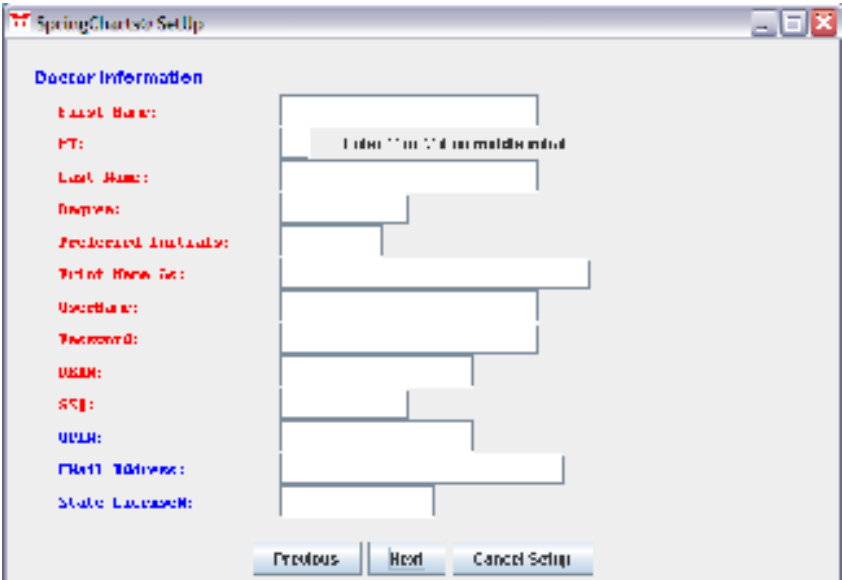

3. Enter your doctor information.

4. If you would like to use the email feature of SpringCharts, you will enter your email settings in the following window. This step can be skipped if the information is not available by following the onscreen instructions to deselect the radio buttons on the next two panels. Email can be setup at a later time from the administrator menu.
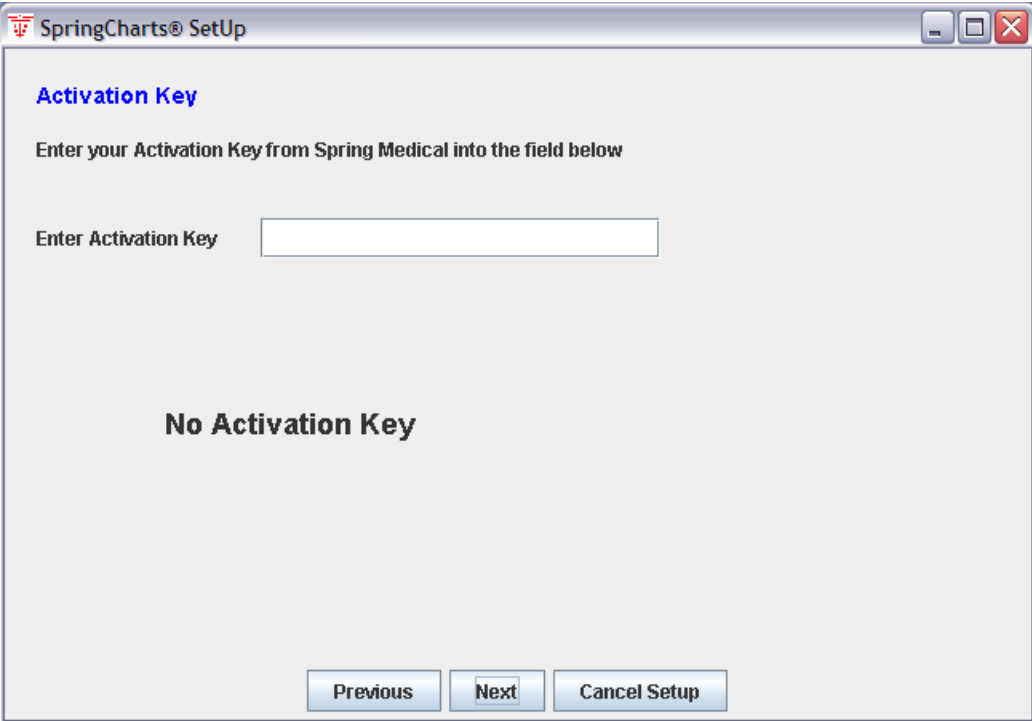
5. Enter your activation key.

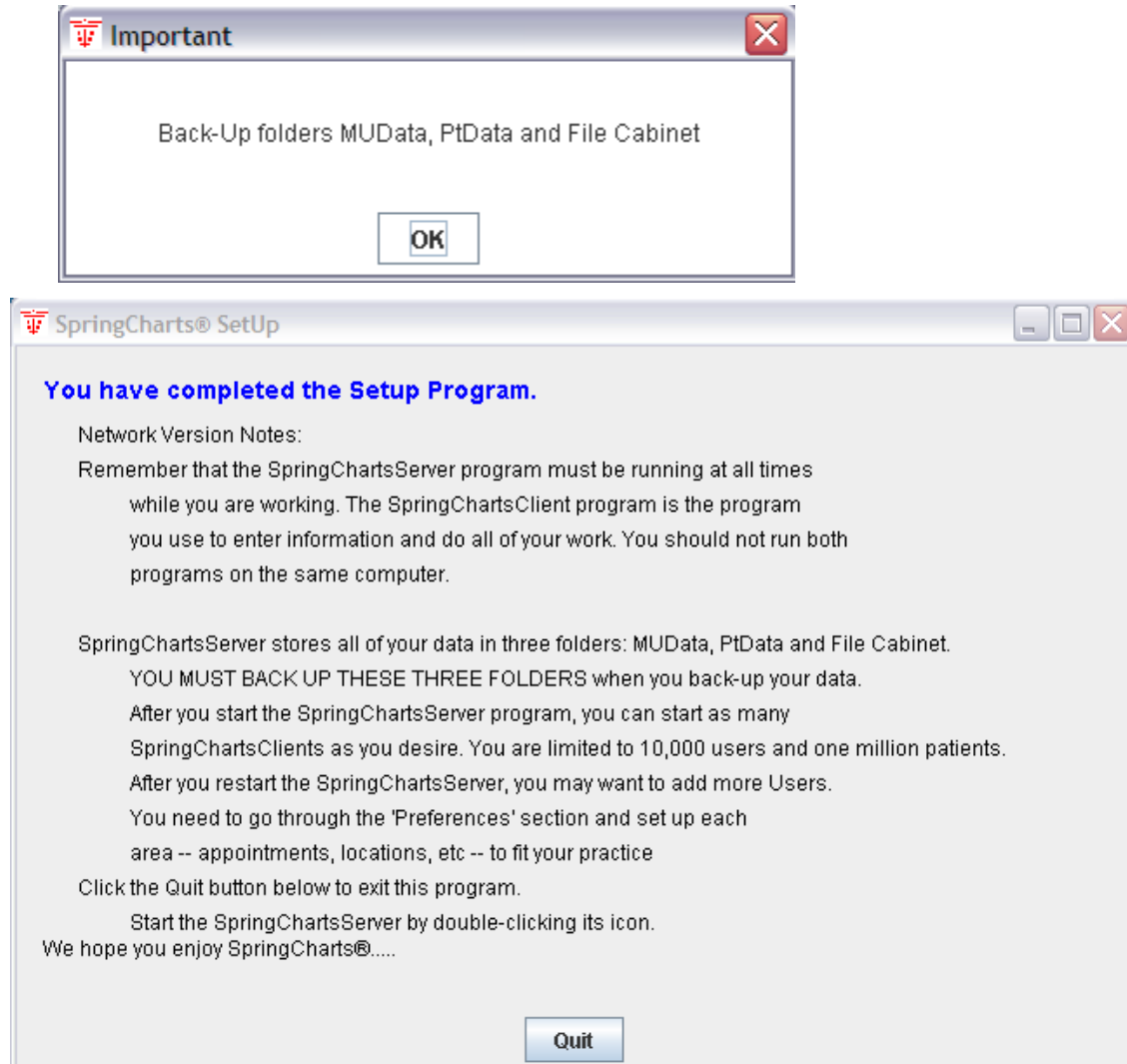6. Click **Finish** on the next screen.

7. If SpringCharts is successfully activated, the following two screens will appear. Click **OK** to back-up your data folders. Then click on **Quit** to end the setup program.


You may now customize SpringCharts with your individual preferences. Please follow the steps in the section, **Setting up SpringCharts Preferences (Single Computer Version).**

Setting up SpringCharts Preferences (Single Computer Version)

Once SpringCharts is successfully installed and activated, it can be customized for your individual medical practice. This involves setting various feature details, such as Users, Doctors, Email, Appointments, etc.

1. Start SpringCharts. You will be prompted to restart SpringCharts to complete the initial setup.
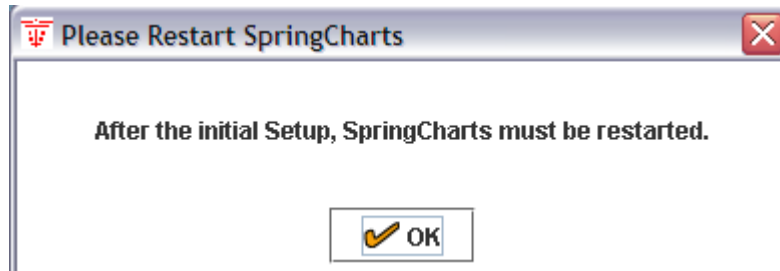
2. Start SpringCharts again. You may be prompted with **Do you have an Activation Key?** If you have already successfully activated the SpringCharts server, click on **Yes**. The preferences are set from the main menu bar of SpringCharts under the administration menu.

3. Enter additional doctors. One doctor was entered during activation, but additional doctors may be added here.

4. Add users (nurses, PA's, clerks, etc.). The user names should be short as they are used throughout the system as part of the messaging system, and as login names. It is recommended that you use your users' initials as their user names.

When a new user is created, the user's SpringCharts access levels are initially set. (The access levels can be changed at any time by a SpringCharts administrator.) To create a new user:

a) On the server, start SpringCharts, and click on **Administrator**.

b) Click on **Users**, and then **New User**. This window will pop up:

c) Fill in the new name, password, initials, and signature.

d) Select each access level to which this user will be allowed. The **Role Manager** has several preconfigured settings to choose from or you can set access manually.

e) Click on **Save** when finished.

f) Select the practice to which this user will be assigned.

5. Some initial preferences should be set before you begin using SpringCharts. Click the **Category Preferences** option from the Administration menu. The following screen appears:
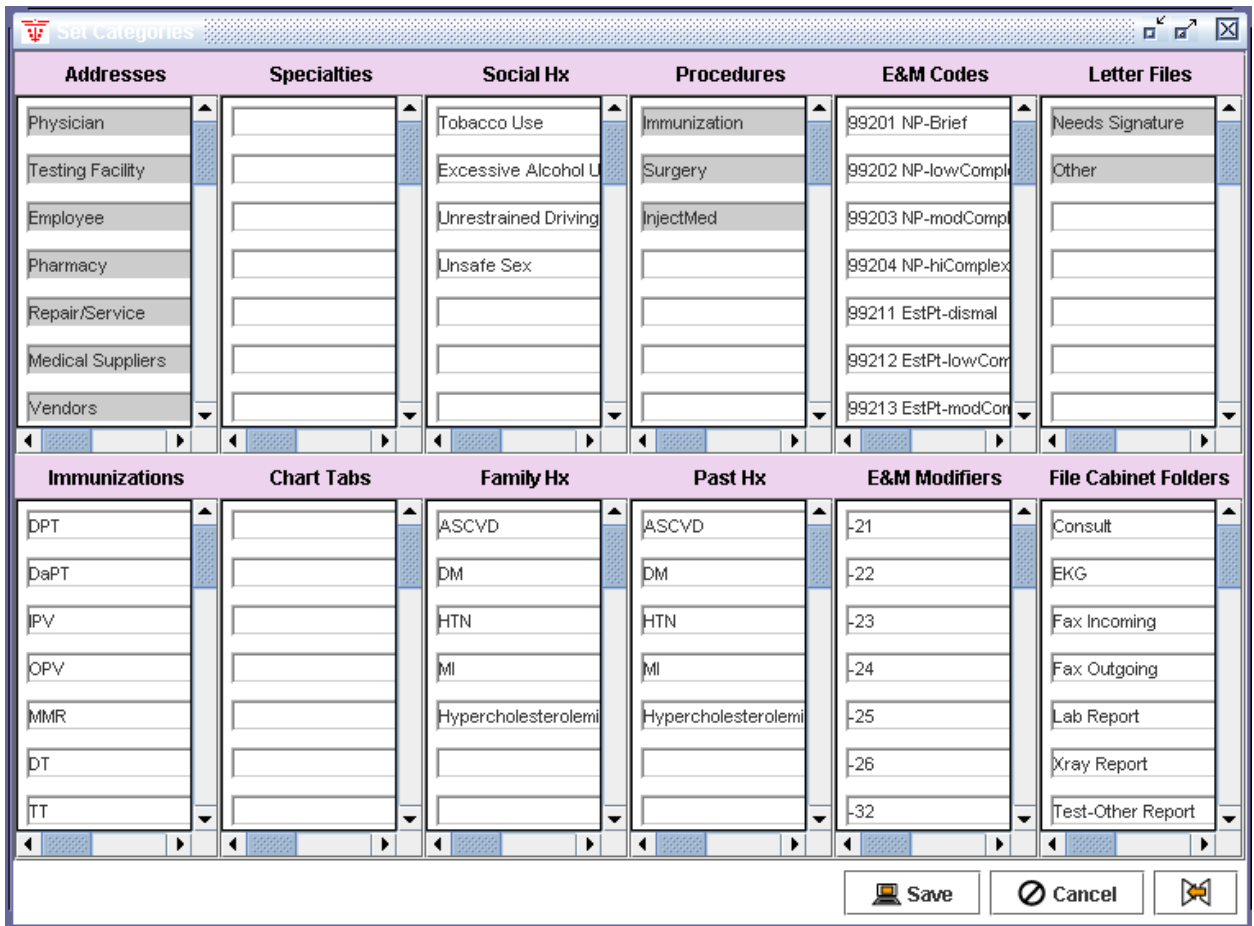
a) **Tracker Locations**. These are short phrases used by the tracking system to locate patients in the office. Enter any location where patients might be located such as: Waiting Room, Exam 1, Exam 2, Exam 3, Exam 4, Nurse Desk, Lab, etc.

b) **Tracker Status**. These are short phrases used to indicate the status for the patient. Examples include: Needs Shot, Ready for Dr., Needs Lab, Lab Done, Needs X-ray, BP Check, Lab Only, etc.

c) **Addresses.** Enter the address book categories. You can search the address book for things like Plumbers, Doctor's Friends, or whatever categories you choose to add. Some default categories are permanent like Physician and Pharmacy. This is because the program uses these categories in other locations. If you enter frequently called pharmacies into the address book, then from the messaging system, you can hit the button **Pharmacies** and choose from the list of pharmacies you have entered.

d) **Specialties.** Set the address book specialties. This allows you to create keywords to your address book entries to allow you to create subsets when searching the address book.

e) **Social History.** These phrases are available in the face sheet and are useful for rapid entry when entering a patient's social history. Examples include: Smokes Tobacco, Excessive Alcohol, and Unprotected Sex.

f) **Procedures**. Some categories are preset, like Immunizations, Surgery, and InjectMed. But, you can define others, like Casting, Minor Surgery, etc. Procedures allow for speedy and consistent data entry into the patient's chart.

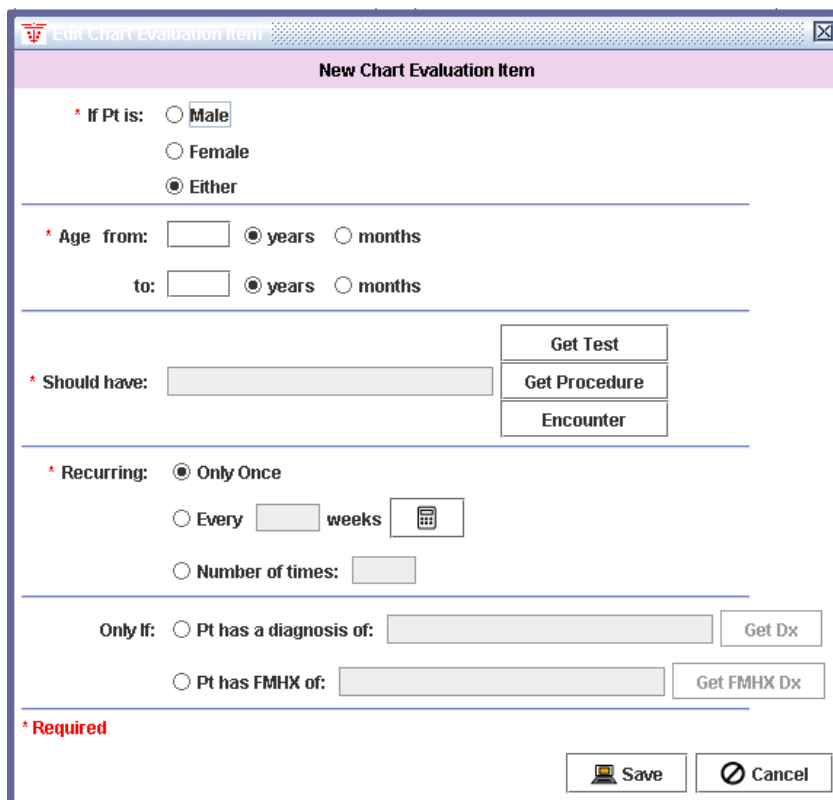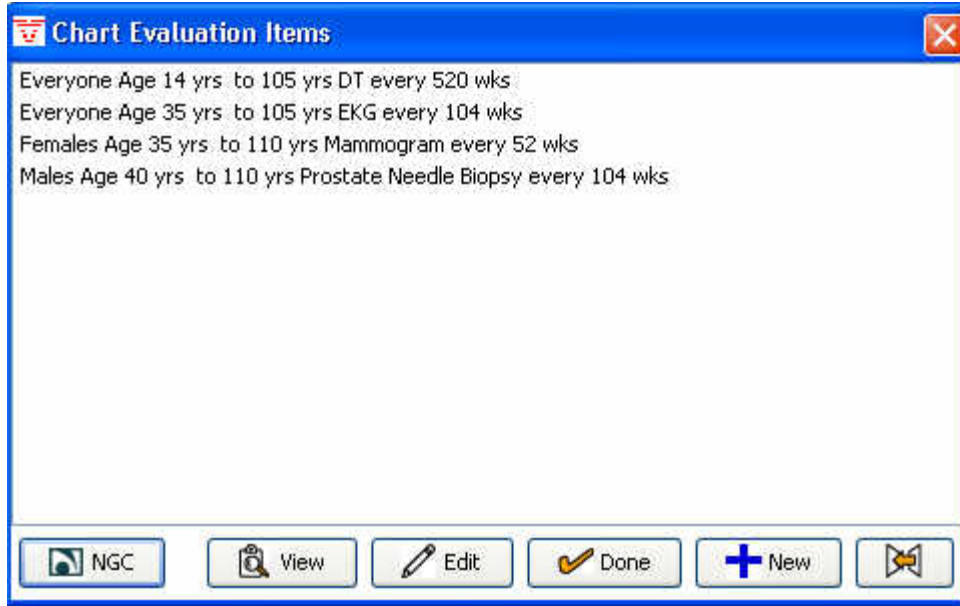g) **E&M Codes.** These are your most frequently used office visit code preferences. These codes will go into a dropdown menu for rapid entry on routing slips.

h) **Letter Files.** When you write a letter that concerns a patient, it is charted in his/her patient record. When you write letters you want to keep, but do not concern a patient's medical health, they are stored here under any name you choose. Examples of these letters include complaints to a hospital, letters to the editor, etc.

i) **Immunizations**. Add the names of the immunizations you most frequently administer.

j) **Chart Tabs.** Create custom tabs (new sections) for patient charts.

k) **Family Hx**. Set family history phrases that are available in the face sheet and are useful for rapid entry when entering a patient's family history. Examples include: ASCVD, DM, HTN, MI, or Hypercholesterolemia.

l) **Past Hx.** Set past history phrases that are available in the face sheet and are useful for rapid entry when entering a patient's history. Examples include: ASCVD, DM, HTN, MI, or Hypercholesterolemia.

m) **E&M Modifiers.** Set your E&M modifiers.

n) **File Cabinet Folders**. Edit the list of File Cabinet folders.

6. Close the **Set Categories** screen and click on **Appointment Setup**. You must define the doctor's weekly appointment schedule. But, you can also schedule other things or resources. For example, you can set a schedule for a resource like a cast room, a nurse's shot schedule, a PA schedule, or for a second or double booking for a doctor or nurse. Choose the interval for the

appointments, the days, and the times during the day that each of these resources is available. An example is:
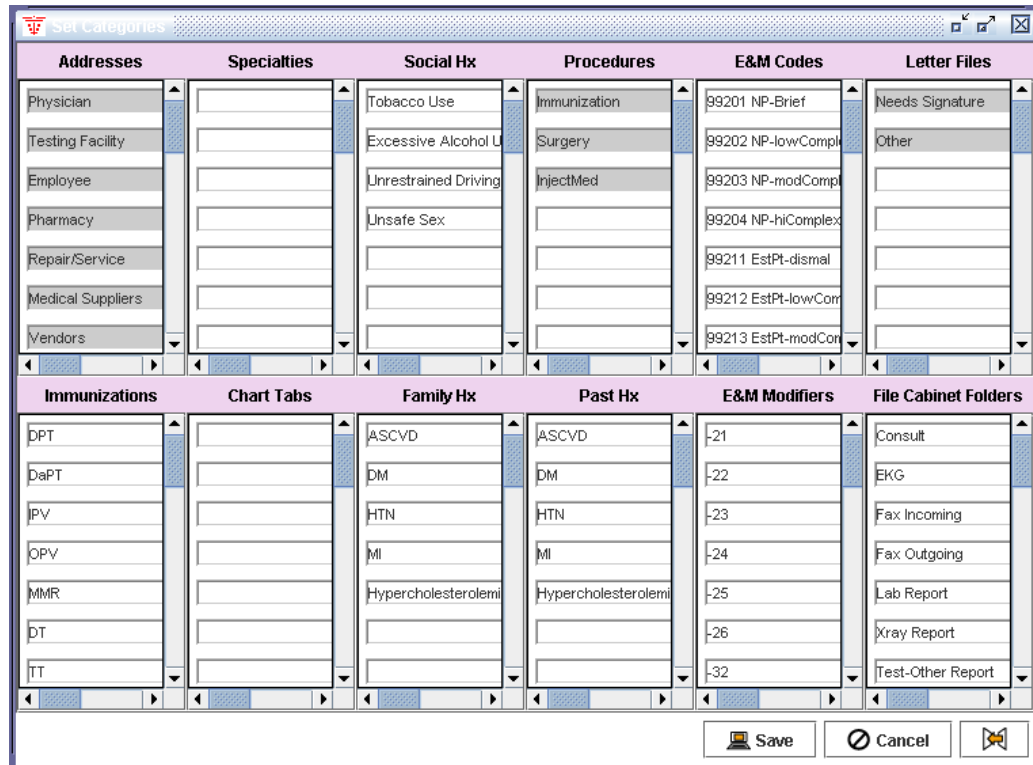
7. **Email Setup**. Skip this step if you entered this information in the setup, or if you do not intend to use email from within SpringCharts. This program simply downloads all of your email from your email account into this program. If a patient has given you his/her email address, and he/she sends you an email, the messaging system will pull the patient chart for you, and will chart your correspondence. The email system is, for security reasons, a **text-only** system. Anything in an email that is not text, like attachments, viruses, etc, is removed before entering the system. Also, in order for the email system to work properly, your email must be received from a POP server. Therefore, the email system will not work if you get your mail from AOL, Yahoo, or Hotmail.

8. **Chart Evaluations**. This is a powerful feature of the program. Screening data can be entered to check each chart as it is pulled up. For instance, you can enter criteria like: all females age 35-40 should have one mammogram, or all females over age 40 should have a mammogram every 2 years, etc. Click the **Chart Evaluations** button. The following screen appears. Then click **New** to create a new evaluation.

Chart Evaluation Items

Everyone Age 14 yrs to 105 yrs DT every 520 wks
Everyone Age 35 yrs to 105 yrs EKG every 104 wks
Females Age 35 yrs to 110 yrs Mammogram every 52 wks
Males Age 40 yrs to 110 yrs Prostate Needle Biopsy every 104 wks

NGC   View   Edit   Done   New

Edit Chart Evaluation Item

New Chart Evaluation Item

* If Pt is: ○ Male
             ○ Female
             ⦿ Either

* Age from: [   ] ⦿ years ○ months
        to: [   ] ⦿ years ○ months

* Should have: [   ]   Get Test
                                        Get Procedure
                                        Encounter

* Recurring: ⦿ Only Once
              ○ Every [   ] weeks [▦]
              ○ Number of times: [   ]

Only If: ○ Pt has a diagnosis of: [   ] Get Dx
          ○ Pt has FMHX of: [   ] Get FMHX Dx

* Required

Save   Cancel

9. The **Database Maintenance** button allows you to verify that the SpringCharts databases are accessible.

10. **Activation Key** allows you to change your activation key if you purchase additional feature packs or enter in a new activation key if your practice information changes (such as your location or telephone area code).

11. **Manage CPT Dictionaries.** The full set of AMA CPT® codes comes with SpringCharts. Use of this feature in the future will allow you to load new or updated CPT codes.

12. **Audit Manager** - Allows you to run user activity reports.

13. **PMS HL7 Link.** This button is used to set up the software link between SpringCharts and PMS (Practice Management Software) or medical laboratories.

    PMS tab**:** link to a PMS via Medical Connect. Before beginning this step, Medisoft or Lytec, and Medical Connect must already be installed and set up. Click on **PMS HL7 Link** and you will see this screen:

Enter the correct setup information to configure the link. Additional help on this setup can be found in a SpringCharts online tutorial.

Lab tab: From here, you can activate a results only interface with LabCorp, Quest Spectrum or other diagnostic labs.

14. **E&M Coder Setup.** The E&M Coder will extract data by keywords from the patient Encounter to assist in determining E&M codes. Some keywords come predefined in SpringCharts. But you may use this feature to edit the keywords.
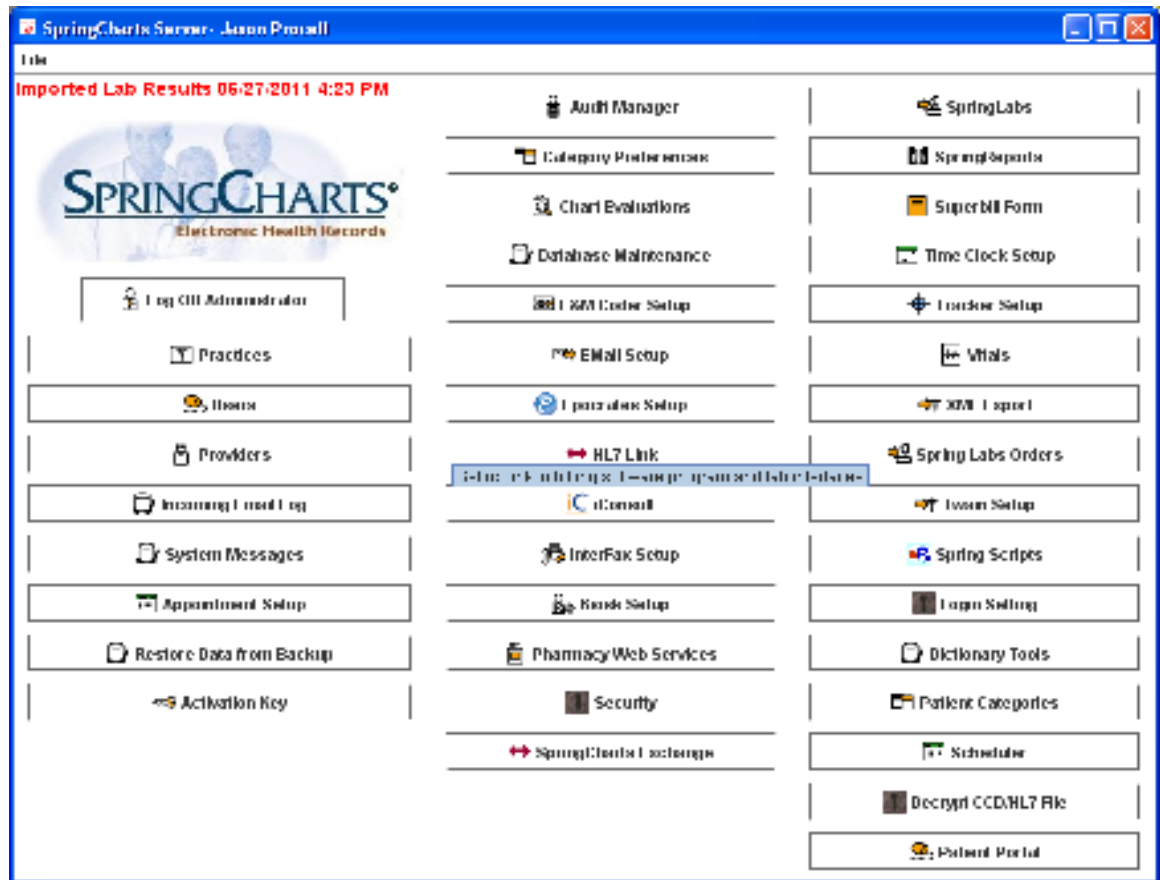
15. **Superbill Form.** Modify the Superbill so that it is customized for your Practice.

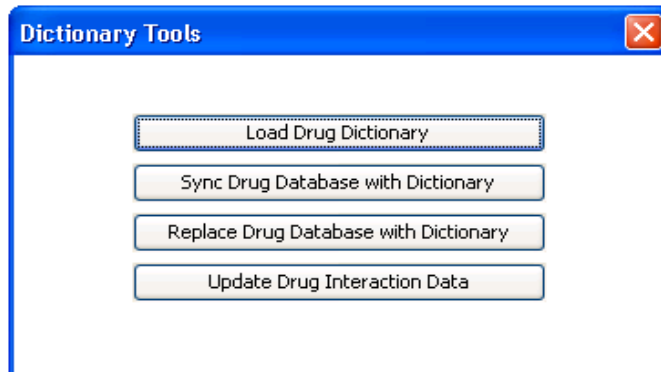16. **Time Clock Setup.** The time clock is not visible unless enabled here.
17. **Vitals.** Add custom fields into the vitals screen.
18. Dictionary Tools. Dictionary tools allows you to load the FDA Drug Database.
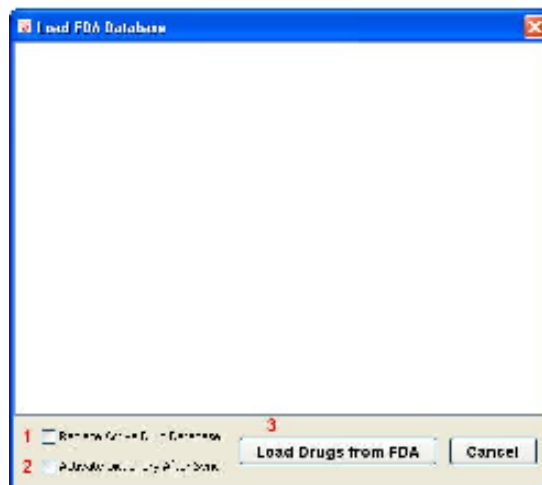
From your server administration screen, go to Dictionary Tools.

Click on Load Drug Dictionary (Note: if you do not subscribe to the SpringCharts Drug Interaction Feature Pack, you will not have access to the 4th button on your screen).

<u>(If you are using Drug Interaction Feature Pack you will need to update this periodically.)</u>

On the following screen you will have several options for synchronizing your current drugs with the new master file.

Option 1 **-** Replace Active Drug Database: This will replace your current active drug database with the FDA database.

Option 2 - Activate Dictionary After Sync: This option will update your current drugs in your active drug database and add in all other drugs from the new master drug file that couldn't be matched.

Note: Option 1 and Option 2 is an OR condition. You can either select one of them or neither of them.

Option 3 - Load Drugs From FDA: If you **don't select either check box** (Option 1 or 2) and only click this button, the sync process will be proceed. In this process, only the currently activated drugs will be update with the drugs from the new master file.

1. Click on Load Drugs from FDA.
2. The loading and synchronizing process could take several hours, so please be patient. During this process, do not use SpringCharts.
3. Once this process is complete, you are ready to go.
4. If you are also using the SpringCharts Drug Interaction program in addition to SpringScripts, please call the Spring Medical Support Line to get further instructions

Advanced Installation Notes

The **MUData** folder on the server contains all of the important database information. For your convenience, several files have been included to get you started. The information in these files has been accumulated over several years of experience in a busy medical office, and may be helpful in giving your office a head start.

The files include:

ICDDictonary - The Standard ICD-9 Codes

DiagnosisFile - A List of Diagnoses

DrugFile - List of Medicines

LabItemFile - Lab Items

TestFile - Lab Tests

MoriTextFile - Report Header Information and Lab Explanations

Preset Codes and Conventions

If you do not want to use the preset codes and conventions, you can simply go to the **MUData** folder on the server and delete the appropriate files. These files will be replaced with empty files the next time you restart your server. You will then be able to put in your own codes using the forms found under the **Libraries** menu item in the client application.

1. If you do <u>not</u> want to use the preset **Diagnosis Codes**, delete the following files (Do not change any other files):

   - Diagnosisfile
   - Diagnosisfileini
   - DiagnosisfilekeyNdx0
   - DiagnosisfilekeyNdx1

2. If you do <u>not</u> want to use the preset **Procedure Codes**, delete the following files (Do not change any other files):

   - Procedurefile
   - Procedurefileini
   - ProcedurefilekeyNdx0
   - ProcedurefilekeyNdx1

3. If you do <u>not</u> want to use the preset **Drug Codes**, delete the following files (Do not change any other files):

   - Drugfile
   - Drugfileini
   - DrugfilekeyNdx0
   - DrugfilekeyNdx1

Installation Assistance

If you purchased SpringCharts from a reseller, please contact your reseller for assistance.

If you purchased SpringCharts directly from Spring Medical Systems, Inc., please email or call us at:

Customer Support: Support@SpringMedical.com   (281)-537-1377