Upgrading to SpringCharts EHR 2011 V1.0.8

<u>General Instructions</u> for all versions of SpringCharts:

1. Logon to the SpringCharts Server and count the number of providers
    a. Once logged in, click on Providers (Doctors in older versions of SpringCharts)
    b. Count the number of providers who are listed as providers in the system
    c. Make sure the EHR 2011 Activation Key has at least this number of providers shown
2. Go to the appropriate section of this document related to the current version of SpringCharts you are using

Upgrading from <u>2011 V1.0.x, Falcon or Version 9.7.5</u> to SpringCharts EHR 2011 V1.0.8 (Server V1.0.8 A)

1. Download the appropriate (PC or Mac) SpringCharts Server ZIP file and extract it to the desktop of your SpringCharts Server
2. Download the appropriate (PC or Mac) SpringCharts Client ZIP file and extract it to the desktop of your SpringCharts Server
3. Prior to performing the upgrade, these items need to be done:
    a. Log in as an administrator on SpringCharts Server
    b. Click on the SpringLabs tab and write down the lab interfaces that are checked
    c. Click on the SpringScripts tab and write down:
        i. The Practice User Name
        ii. The Vendor User Name
        iii. The Vendor Password
4. Shut down SpringCharts Server
5. Create a copy of the SCServer folder in another location on your hard drive. If your FileCabinet folder is large, this process could take a while.
6. Move the SCServer.exe (SCServer.app) file to overwrite the current SCServer.exe (SCServer.app) file
7. Restart SpringCharts Server
8. Make sure the drug database is updated (this should be repeated once each month)
9. Click on the SpringScripts tab and make sure the information you collected in 3.c. above is still there. Also click on Advanced… and confirm that only the following are selected:
    a. Don't send
    b. Send meds on eRx
    c. Show rx print button
10. Copy the SCClient.exe (SCClient.app) file to a shared folder on your network or to a USB drive so you can take this file to each client machine in your practice
11. Copy the SCClient.exe (SCClient.app) file over the existing SCClient.exe (SCClient.app) file on each machine in your practice that has the SpringCharts client software loaded
12. Have each user check to make sure a default doctor is selected in User Preferences

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Upgrading from <u>Older Versions of SpringCharts</u> (V9.5, V9.2, V9.0, V8.x, V7.x) to SpringCharts EHR 2011 V1.0.8 (Server V1.0.8 A)

<u>**Step 1:**</u>
1. Download the appropriate (PC or Mac) SpringCharts Server Upgrade Installer ZIP file and extract it to the desktop of your SpringCharts Server
2. Download the appropriate (PC or Mac) SpringCharts Client Upgrade Installer ZIP file and extract it to the desktop of your SpringCharts Server
3. Prior to performing the upgrade, these items need to be done:
    a. Log in as an administrator on SpringCharts Server
    b. Click on the SpringLabs tab and write down the lab interfaces that are checked
    c. Click on the SpringScripts tab and write down:
        i. The Practice User Name
        ii. The Vendor User Name
        iii. The Vendor Password
4. Shut down SpringCharts Server
5. Find the SCServer folder on your computer and note its path
6. Create a copy of the MUData folder in another location on your hard drive
7. Open the SCServerSetup, it will open and start running
    a. Click on the Change Default Locations button
    b. Next to the Program File Folder, change the path to the path you noted in step 5 with an \SCServer at the end
    c. Click Proceed and click "Yes, I Do" to accept the license agreement

Note: After you have downloaded the upgrade proceed with doing the install of the program. If you are doing the Windows version is will send you to a setup screen and click on the option to install the SpringCharts demo. Do not worry about the naming conventions of the install it is not the demo version of SpringCharts (for Mac users it will just have the install button when the setup screen shows). After you are done downloading and installing the upgrade on the computer proceed with the regular steps of installing the new version of SpringCharts.

8. Drag the SpringCharts Icon from the window that opens to your desktop

<u>**Step 2:**</u>
1. Download the appropriate (PC or Mac) SpringCharts Server ZIP file and extract it to the desktop of your SpringCharts Server
2. Download the appropriate (PC or Mac) SpringCharts Client ZIP file and extract it to the desktop of your SpringCharts Server
3. Move the SCServer.exe (SCServer.app) file to overwrite the current SCServer.exe (SCServer.app) file
4. Restart SpringCharts Server
5. Make sure the drug database is updated (this should be repeated once each month)
6. Click on the SpringScripts tab and make sure the information you collected in 3.c. above is still there. Also click on Advanced… and confirm that only the following are selected:

      a. Don't send
      b. Send meds on eRx
      c. Show rx print button

7. Copy the SCClient.exe (SCClient.app) file to a shared folder on your network or to a USB drive so you can take this file to each client machine in your practice
8. Copy the SCClient.exe (SCClient.app) file over the existing SCClient.exe (SCClient.app) file on each machine in your practice that has the SpringCharts client software loaded
9. Have each user check to make sure a default doctor is still chosen in User Preferences
10. Double click on the SpringCharts Icon on your desktop to open your SpringCharts Server
      a. Log in as administrator
      b. Click Activation Key and make sure it matches the Activation Key provided
      c. Shut down SpringCharts Server, then restart it and enter the new version key
      d. Double check all other keys provided by clicking on the appropriate buttons
      e. Reenter the SpringScripts information on the SpringScripts tab
11. Make sure the drug database is updated (this should be repeated once each month)
12. Copy the SCClient.exe (SCClient.app) file to a shared folder on your network or to a USB drive so you can take this file to each client machine in your practice
13. Copy the SCClient.exe (SCClient.app) file over the existing SCClient.exe (SCClient.app) file on each machine in your practice that accesses SpringCharts
14. Have each user check to make sure a default doctor is chosen in User Preferences