SpringCharts®

# SpringCharts for Windows Installation Guide

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#### <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 Server 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! <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 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:

🔗 Spring Medical Systems, Inc. SpringCharts Server 2011 Setup
Welcome to <u>Spring Medical Systems, Inc. SpringCharts Server 2011</u> setup. This version was released on Monday, June 13, 2011. Copyright © 2010, Spring Medical Systems, Inc.
DeployMaster has detected that Spring Medical Systems, Inc. SpringCharts Server 2011 is already installed This setup package contains an older version of this application. Though not recommended, you can downgrade your existing installation to this version.
Install SpringCharts Software
README
Change Default Locations
Do Not Install

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:

Spring Medical Systems, Inc. SpringCharts Server 2011 Setup	
Welcome to <u>Spring Medical Systems, Inc. SpringCharts Server 2011</u> setup. This version was released on Monday, June 13, 2011. Copyright © 2010, Spring Medical Systems, Inc.	
SpringCharts Server 2011 has been successfully installed on your system	
Thanks!	

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**.

🐨 SpringCharts® SetUp	X
We will guide you through the setup of SpringCharts®.	
You will need the following information to complete the setup:	
Name, address, phone number of your Practice	
Name of one Doctor in your Practice, his SS#, DEA and license number	
If you want to use the integrated EMail (and you will), you will need:,	
One Email address (this will be THE Email address for your practice)	
The POP address from your Internet Service Provider (ISP)	
The SMTP address from your ISP	
and the password for your email account	
Required Fields have red labels.	
Click Next to continue or click Cancel Setup to exit setup	
Next Cancel Setup	

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.

🐺 SpringCharts® SetUp		
Practice Information		
Practice Name:		
Practice Street Address:		
Practice City:		
Practice State:		
Practice Zip Code:		
Practice Phone#:		
Practice Fax#:		
Practice Email Address		
	Previous Next Cancel Setup	

3. Enter your doctor information.

🐺 SpringCharts® SetUp		_ 🗆 🔀
Doctor Information		
Doctor information		
First Name:		
MII :	Enter '-' or '.' if no middle initial	
Last Name:		
Degree :		
Preferred Initials:		
Print Name As:		
UserName:		
Password:		
DEA#:		
SS#:		
UPIN:		
EMail Address:		
State License#:		
	Previous Next Cancel Setup	

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.

ractice EMail:				'name@yourisp.com'
SP POP Address:				'POP.yourisp.com'
SP SMTP Address:				'SMTP.yourisp.com'
Mail Account Name:				'yourname'
Mail Password:				'yourpassword'
SP POP Port		110	Set to 110	
ax # EMail Messages Downlo	aded	50		
inute Interval to Check Em	ail	15		



🐨 SpringCharts® SetUp	_ 🗆 🛛
Are all of the other Computers also connected to the Internet?	
Client computer Connection to the internet is needed to use the integrated Email	
Yes, the other (client) computers are connected to the Internet	
Previous Next Cancel Setup	

5. Enter your activation key.

🐺 SpringCharts® SetUp	
Activation Key	
Enter your Activation Key from Spring Medical into the field below	
Enter Activation Key	
No Activation Key	
Previous Next Cancel Setup	

- 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.

🐺 Important	X
Back-Up folders MUData, PtData and File Cabinet	
ОК	



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.

🐺 Please Restart SpringCharts	X
After the initial Setup, SpringCharts must be restart	ted.
🖌 ок	

9. When you restart SpringCharts, it will ask you to enter your Falcon version key. Enter your key and press **OK**.

🐺 SpringCharts Server
File
Loading data
SpringCharts Electronic Health Records
Administrator
🐺 Enter Version Key
0223699
Enter Version 9 Key
🖌 ок

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:

SpringCharts Server- Jason Procell		
File		
Imported Lab Results 06/27/2011 4:23 PM	🖨 Audit Manager	🕰 SpringLabs
6802	Category Preferences	SpringReports
SPRINGCHARTS®	🕰 Chart Evaluations	E Superbill Form
Electronic nearch records	🛱 Database Maintenance	Time Clock Setup
🔓 Log Off Administrator	DE E&M Coder Setup	+ Tracker Setup
T Practices	😂 EMail Setup	₩ Vitals
🕭 Users	Epocrates Setup	🔿 XML Export
Providers	↔ HL7 Link Set up link to billing software program and lab	Spring Labs Orders
🛱 Incoming Email Log	iC iConsult	⇔† Twain Setup
💭 System Messages	🖺 InterFax Setup	eR Spring Scripts
Appointment Setup	R⊫⇒ Kiosk Setup	Login Setting
🛱 Restore Data from Backup	Pharmacy Web Services	Dictionary Tools
	Security	Patient Categories
	↔ SpringCharts Exchange	Scheduler
		Decrypt CCD/HL7 File
		Patient Portal

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.

😨 Change User Inform	nation			
Name:				
Password:				
Initials:				
Signature:				
SpringScripts User:				
SpringScripts Pass:				
User Number:	51			
Role Manager:	*			
	Set Access Levels			
	🔽 Get Routing Slips	🗹 Get Incoming EMail	🗹 Get Pending Tests	Get Completed Tests
	🔽 Edit Report Headers	🗹 Edit Insurance	🗹 Delete a Chart Entry	View Charts
	🛃 Edit Charts	🗹 Print Chart	🗹 Print Letters	Print Prescriptions
	Access Administration	🗹 Lock Charts	🗹 Edit Appointments	Lock Encounters
	Financial Transactions	Access Locked Chart		
				Save 🖉 Cancel

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.

🐺 Appointment Set-up
Click on the Schedule to Edit
Set up Doctor Schedule
Doc, MD
Add non-Dr Schedule
C. Dava
🥓 Done

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.

🐺 Set Up Appts for: Doc, MD 🛛 🛛 🔀				
Select Appointment Length: 10 💌				
Click Day with Appts	Day Start	Lunch Start	Lunch Stop	Day Stop
O Sunday	-	-	-	-
Monday	8am 🔻	11pm 👻	noon 👻	5pm 🔻
Tuesday	-	-	-	
Wednesday	-	-	-	<b>•</b>
Thursday	-	-	-	<b></b>
Friday	10am 👻	noon 👻	1pm 👻	3am 🔻
⊖ Saturday	-	-	-	-
	Done Cancel Delete			

- 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 <u>text-only</u> 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.

Chart Evaluation Items	
Everyone Age 14 yrs to 105 yrs DT every 520 wks	0.00
Everyone Age 35 yrs to 105 yrs EKG every 104 wks	
Females Age 35 yrs. to 110 yrs Mammogram every 52 wks	
Aales Age 40 yrs to 110 yrs Prostate Needle Biopsy every 104 wks	
NGC 👸 View 🖉 Edit 🖌 🖌 Done	🕂 New 🕅 🕅

👿 Edit Chart Ev	aluation item		X
	New Chart Evaluation	ltem	
* If Pt is:	O Male		
	⊖ Female		
	Either		
* Age from:	📃 🖲 years 🔿 months		
to:	error sector years of months		
		Get Test	
* Should have:		Get Procedure	
		Encounter	-
* Recurring:	Only Once		
	C Every weeks		
	O Number of times:		
Only If:	O Pt has a diagnosis of:		Get Dx
	O Pt has FMHX of:		Get FMHX Dx
* Required			
		💻 Save	O Cancel

- 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:

👿 HL7 Link Set Up		
PMS PHS HL7		
P	MS HL7 Link Setup	
PMS Service Key	2912	
Enable PMS HL7 Link?	● Enable   ○ Disable	
Use Link:	Standard	
PMS Host IP Address:		
Patient Data Port:		
Transaction Data Port:		
INBound Data Folder:	ktop\2011\HL7\ToSC	
OUTBound Data Folder:	top\2011\HL7\ToPMS	
Unprocessed Data Folder:	(top\2011\HL7\UnPro	
Use Appointment Systen	n: 🔿 PMS 🖲 SpringCharts	
Handle Transactions If P	'MS Link Is Disconnected:	
🔿 Transmit When I	ink Reestablished	
Create And Send A Routing Slip		
Add new patients on update		
✓ Send Transaction Only		
🖌 Done	Cancel	

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.

SpringCharts Server-Jason Protell		
l de		
mported Lab Results 06/27/2011 4:23 PM	🛱 Audi Manaper	🔨 SpringLabs
- Kal	Talegory Preferences	Di Springlösports
SpringCharts*	🚊 Chart Evaluations	Superbil Form
Electronic Health Records	📑 Database Maintenance	Time Clock Setup
🔓 Log CHI Administrator	att 1 XM Coder Setup	🔶 Loadoer Selup
T Practices	ree EMail Schup	🖶 Vitals
🤗 Ibara	🙆 I porzałem Selup	477 XIM i sport
🛱 Providers	HL7 Link	4월 Spring Labs Orders
🛱 keaming Lineal Log	C itered	🕂 Iwan Selup
🗗 System Messages	👼 InterFax Setup	Spring Scripts
Appointment Selup	Bay Kande Salup	🜃 Lagan Solling
🖸 Restore Data from Backup	🗧 Pharmacy Web Services	Dictionary Tools
Activation Key	Security	Parlient Categories
	🖶 SpringCharls Lacharige	Scheduler
		Decrypt CCD/HL7 File
		🥵 Patent Portal

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 4<sup>th</sup> button on your screen.)

Dictionary Tools	×
Load Drug Dictionary	
Sync Drug Database with Dictionary	
Replace Drug Database with Dictionary	
Update Drug Interaction Data	

(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:

Spring Medical Systems, Inc. SpringCharts Client 2011 Setup	
Welcome to <u>Spring Medical Systems, Inc. SpringCharts Client 2011</u> setup. This version was released on Monday, June 13, 2011. Copyright © 2010, Spring Medical Systems, Inc.	
DeployMaster has detected that Spring Medical Systems, Inc. SpringCharts Client 2011 is alread This is the same version of the application in this setup package.	dy installed c
Install SpringCharts Software	
README	
Change Default Locations	
Do Not Install	
Copyright © 2010, Spring Medical Systems, Inc. DeployMaster has detected that Spring Medical Systems, Inc. SpringCharts Client 2011 is alread This is the same version of the application in this setup package. Install SpringCharts Software README Change Default Locations	dy installed c

 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:

Spring Medical Systems, Inc. SpringCharts Client 2011 Setup	
Welcome to <u>Spring Medical Systems, Inc. SpringCharts Client 2011</u> setup. This version was released on Monday, June 13, 2011. Copyright © 2010, Spring Medical Systems, Inc.	
SpringCharts Client 2011 has been successfully installed on your system Thanks!	

- 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

#### <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 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:

Spring Medical Systems, Inc. SpringCharts SCV 2011 Setup	
Welcome to <u>Spring Medical Systems, Inc. SpringCharts SCV 2011</u> setup. This version was released on Monday, June 13, 2011. Copyright © 2010, Spring Medical Systems, Inc.	
Install SpringCharts Software README	
Change Default Locations	
Do Not Install	

 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:

Spring Medical Systems, Inc. SpringCharts SCV 2011 Setup	
Welcome to <u>Spring Medical Systems, Inc. SpringCharts SCV 2011</u> setup. This version was released on Monday, June 13, 2011. Copyright © 2010, Spring Medical Systems, Inc.	
SpringCharts SCV 2011 has been successfully installed on your system Thanks!	

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**.

🐺 SpringCharts® SetUp	_ 🗆 🔀
We will guide you through the setup of SpringCharts®.	
You will need the following information to complete the setup:	
Name, address, phone number of your Practice	
Name of one Doctor in your Practice, his SS#, DEA and license number	
If you want to use the integrated EMail (and you will), you will need:,	
One Email address (this will be THE Email address for your practice)	
The POP address from your Internet Service Provider (ISP)	
The SMTP address from your ISP	
and the password for your email account	
Required Fields have red labels.	
Click Next to continue or click Cancel Setup to exit setup	
Next Cancel Setup	

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.

¥ SpringCharts& SetUp		2
Practice Information		
Practice Banes		
Practice Street Address:		
Practice City:		
Practice State:	<b>v</b>	
Practice Yap Code:		
Practice Finnels		
Practice Fails		
Practice Email Ardress		
	Previous Next Caucel Scoup	

3. Enter your doctor information.

🕶 SpringCharts© SetUp		_ 🗆 🛛
Dector Information		
Easet Bares		
PT:	Later Marchite wolde initial	
Land, Hames		
Despires:		
Preferred Instrates		
Finish Here So:		
Usertiane:		
Text month ():		
UERN:		
S5[]:		
UPTH:		
FRett Todowski		
State LuceaseR:		
	Previous Hext Cancel Setup	

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.

🐺 SpringCharts® SetUp				
Email and Internet Conn				
** Required only if you wan	it to use the	e integrated Ema		1
Practice EMail:				'name@yourisp.com'
ISP POP Address:				'POP.yourisp.com'
ISP SMTP Address:				'SMTP.yourisp.com'
EMail Account Name:				'yourname'
EMail Password:				'yourpassword'
ISP POP Port	[	110	Set to 110	
Max # EMail Messages Downl	oaded	50	]	
Minute Interval to Check E	mail	15		
IMPORTANT: You can leave thi	is informati	ion blank only IF y	ou un-select the	
radio buttons in the next two p	anels. You	can modify EMai	settings later.	
	Previous	s Next	Cancel Setup	

🐨 SpringCharts® SetUp	_ 🗆 🔀
Is this computer connected to the Internet?	
Connection to the Internet is needed to use the integrated Email	
Yes, This Server is connected to the Internet	
If you click yes, then you must complete the previous screen (EMail) information If you click no, the EMail functions will be turned off. You may turn them back on using the SpringChartsServer preferences.	
Previous Next Cancel Setup	

5. Enter your activation key.

🐺 SpringCharts® SetUp	_ 🗆 🔀
Activation Key	
Enter your Activation Key from Spring Medical into the field below	
Enter Activation Key	
No. 8 official Korr	
No Activation Key	
Previous Next Cancel Setup	

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.

🐺 Important 🛛 🔀	
Back-Up folders MUData, PtData and File Cabinet	
ОК	
🐺 SpringCharts® SetUp	
You have completed the Setup Program.	
Network Version Notes:	
Remember that the SpringChartsServer program must be running at all times while you are working. The SpringChartsClient program is the program you use to enter information and do all of your work. You should not run both programs on the same computer.	
SpringChartsServer stores all of your data in three folders: MUData, PtData and File Cabinet. YOU MUST BACK UP THESE THREE FOLDERS when you back-up your data. After you start the SpringChartsServer program, you can start as many SpringChartsClients as you desire. You are limited to 10,000 users and one million patients After you restart the SpringChartsServer, you may want to add more Users. You need to go through the 'Preferences' section and set up each area appointments, locations, etc to fit your practice Click the Quit button below to exit this program. Start the SpringChartsServer by double-clicking its icon. We hope you enjoy SpringCharts®	
Quit	

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:

👿 Change User Inform	nation			
Name:				
Password:				
Initials:				
Signature:				
SpringScripts User:				
SpringScripts Pass:				
User Number:	51			
Role Manager:	*			
	Set Access Levels			
	Get Routing Slips	🔽 Get Incoming EMail	🔽 Get Pending Tests	Get Completed Tests
	🛃 Edit Report Headers	🛃 Edit Insurance	🔽 Delete a Chart Entry	View Charts
	🛃 Edit Charts	🗹 Print Chart	🔽 Print Letters	Print Prescriptions
	Access Administration	🗹 Lock Charts	🛃 Edit Appointments	Lock Encounters
	Financial Transactions	Access Locked Chart		
				Save 🖉 Cancel

- 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:

👿 Set Categories 🖁					ت a ک
Addresses	Specialties	Social Hx	Procedures	E&M Codes	Letter Files
Physician		Tobacco Use	Immunization	99201 NP-Brief	Needs Signature
Testing Facility		Excessive Alcohol U	Surgery	99202 NP-lowComple	Other
Employee		Unrestrained Driving	InjectMed	99203 NP-modCompl	
Pharmacy		Unsafe Sex		99204 NP-hiComplex	
Repair/Service				99211 EstPt-dismal	
Medical Suppliers				99212 EstPt-lowCom	
Vendors			-	99213 EstPt-modCon 🖵	•
Immunizations	Chart Tabs	Family Hx	Past Hx	E&M Modifiers	File Cabinet Folders
		ASCVD	ASCVD	-21	Consult
DaPT		рм	рм	-22	EKG
IP∨		HTN	HTN	-23	Fax Incoming
OPV		м	м	-24	Fax Outgoing
MMR		Hypercholesterolemi	Hypercholesterolemi	-25	Lab Report
рт				-26	Xray Report
TT		-	-	-32 -	Test-Other Report
				💻 Save 🛛 🤇	🕽 Cancel 🛛 🕅

- 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.
- 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

Addresses	Specialties	Social Hx	Procedures	E&M Codes	Letter Files
hysician		Tobacco Use	Immunization	99201 NP-Brief	Needs Signature
esting Facility		Excessive Alcohol U	Surgery	99202 NP-lowCompl	Other
nployee		Unrestrained Driving	InjectMed	99203 NP-modCompl	
armacy		Unsafe Sex		99204 NP-hiComplex	
pair/Service				99211 EstPt-dismal	
edical Suppliers				99212 EstPt-lowCom	
endors 🚽		•		99213 EstPt-modCon	
			· ·	· ·	
55555		▲ 888888	<ul> <li>▲ 20000000</li> </ul>	<ul> <li>▲ 0000000 ▶</li> </ul>	
Immunizations	Chart Tabs	Family Hx	Past Hx	E&M Modifiers	File Cabinet Folder
Immunizations	J		<u> </u>		
	<u> </u>	Family Hx	Past Hx	E&M Modifiers	File Cabinet Folder
Immunizations PT APT	<u> </u>	Family Hx	Past Hx	E&M Modifiers	File Cabinet Folder
aPT	<u> </u>	Family Hx	Past Hx	E&M Modifiers	File Cabinet Folder
Immunizations PT aPT V PV	<u> </u>	Family Hx ASCVD DM HTN	Past Hx ASCVD DM HTN	E&M Modifiers	File Cabinet Folder
Immunizations PT aPT PV MR	<u> </u>	Family Hx  ASCVD  M  HTN  M	Past Hx ASCVD DM HTN M	E&M Modifiers	File Cabinet Folder
	<u> </u>	Family Hx  ASCVD  M  HTN  M	Past Hx ASCVD DM HTN MI Hypercholesterolemi	E&M Modifiers	File Cabinet Folde Consult EKG Fax Incoming Fax Outgoing Lab Report Xray Report

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 <u>text-only</u> 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 Ev	aluation Item				
New Chart Evaluation Item					
* If Pt is:	O Male				
	○ Female				
	Either		_		
* Age from:	• years O months				
to:	vears      months				
		Get Test			
* Should have:		Get Procedure			
		Encounter			
* Recurring:	Only Once		_		
	C Every weeks				
	○ Number of times:				
Only If:	) Pt has a diagnosis of:		Get Dx		
	O Pt has FMHX of:	Ge	t 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:

👿 HL7 Link Set Up 🛛 🔀				
PMS PHS HL7				
PMS HL7 Link Setup				
PMS Service Key	2912			
Enable PMS HL7 Link?	Enable			
Use Link:	Standard 💌			
PMS Host IP Address:				
Patient Data Port:				
Transaction Data Port:				
INBound Data Folder:	ktop\2011\HL7\ToSC			
OUTBound Data Folder:	top\2011\HL7\ToPMS			
Unprocessed Data Folder:	dop\2011\HL7\UnPro			
Use Appointment System: 🔿 PMS 💿 SpringCharts				
Handle Transactions If P	MS Link Is Disconnected:			
O Transmit When Link Reestablished				
Create And Send A Routing Slip				
<ul> <li>☐ Add new patients on update</li> <li>☑ Send Transaction Only</li> </ul>				
Mone Cancel				

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.

SpringCharts Server- Jacon Provall		
Lile		
Imported Lab Results 06/27/2011 4:23 PM	🛱 Audi Manaper	🔨 SpringLabs
-	Totagory Preferences	M Springl&ports
SpringCharts*	3. Chart Evaluations	🗧 Superbill Form
	🗒 Database Maintenance	Time Clock Setup
🚡 Log CIII Administrator	and Law Coder Setup	+ Loader Selup
T Practices	P EMail Scoup	🖶 Vitals
🙁, Ibara	🚱 I poczałew Selup	्रम् XML i sport
🛱 Providers	HL7 Link G-log of kultulogist L-songe opsimised (short)	Spring Labs Orders
🛱 incoming Lineal Leg	iC iConsul	📑 Iwan Salup
📴 System Messages	💏 InterFax Setup	Spring Scripts
Tel Apponiment Selup	资 <sub>的</sub> Kande Setup	📷 Lagan Selling
🖸 Restore Data from Backup	Pharmacy Web Services	Dictionary Tools
	Security	Patient Categories
	🖶 SpringCharls Lecturgs	Scheduler
		Decrypt CCD/HL7 File
		🤐 Patent Portal

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 4<sup>th</sup> button on your screen).

Dictionary Tools		
Load Drug Dictionary		
Sync Drug Database with Dictionary		
Replace Drug Database with Dictionary		
Update Drug Interaction Data		

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

🐱 Lood FDA Database	2
1 ERETARN Groef Contention	3
2 Administration of Allerborn	Load Drugs from FDA Cancel

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.

S-011-1106

- 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: <u>Support@SpringMedical.com</u> (281)-537-1377