



Medtech32 Australia Version 9.3.0 Build 4620 Release

Installation Checklist



IMPORTANT NOTE

WARNING: This checklist contains **MANDATORY** prerequisites which **MUST BE COMPLIED WITH PRIOR** to installing **Medtech32 Version 9.3.0 Build 4620**.

The consequences of not meeting these prerequisite requirements could possibly lead to application malfunction and data corruption and, as a result, data loss and system downtime.







Please ensure this checklist is circulated to all your internal IT staff or external IT service provider, and ensure the IT technician(s) responsible for the installation submits the **completed** checklist to the practice manager.






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For further information on this Release, or any other queries regarding **Medtech32 Version 9.3.0 Build 4620**, please contact the **Medtech Helpdesk** on Tel: **1800 148 165 → Option 1** or Email: support@medtechglobal.com.


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Server Installation Checklist

| Server Prerequisite Checklist | Tick | Date / Time | Action By | Time Spent |
|---|------|-------------|-----------|------------|
|  <p>!!! WARNING !!!</p> <p>Has sufficient down time been set aside for the Upgrade to Medtech32 V9.3.0 Build 4620?</p> <p>Depending on the size of the Medtech32 Database, the Provider Banking Utility could run for several HOURS and must be allowed to fully complete.</p> | | | | |
|  <p>Has the minimum version - (<u>VERSION 9.1.7 Build 4293 OR ABOVE</u>) requirements been met?</p> <p>This can be checked by logging onto Medtech32 and selecting <i>Help ► About Medtech32</i>.</p> | | | | |
|  <p>Have you <u>READ THROUGH</u> the document "<u>MT32 Information for Release and Installation - V9.3.0 B4620</u>" which is included in the mail out?</p> <p>The document is also available on the Medtech Global website: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</p> <p>This document contains valuable information that if not read could seriously affect the upgrade process and possible downtime of your network.</p> | | | | |
|  <p>Have you logged in with Windows <u>ADMINISTRATIVE RIGHTS</u>?</p> | | | | |
|  <p>Have you <u>DISABLED</u> "User Account Control" (UAC) policy across <u>ALL</u> Server and Client computers that are running on <u>Windows Vista or Windows 7 or Windows 2008 or Windows 2008 R2</u>?</p> | | | | |
|  <p>To avoid unnecessary problems during installation, upgrade or maintenance, preferably you must <u>ALWAYS</u> log onto Windows in "Console Mode" – i.e. not through Remote Desktop or Citrix, but via alternative means that allows remote connection to the Console such as VNC, TeamViewer, etc.</p> | | | | |

| Server Prerequisite Checklist | Tick | Date / Time | Action By | Time Spent |
|---|------|-------------|-----------|------------|
|  <p>If the Medtech32/Interbase Server is also serving as Microsoft Remote Desktop Services (formerly Terminal Services) and/or Citrix XenApp (formerly Presentation Server), ensure it is switched to <u>INSTALL MODE</u>. (REMEMBER to change back to <u>EXECUTABLE MODE</u> after the installation is complete)</p> | | | | |
|  <p>Have <u>ALL</u> Briefcasing Laptops with <u>OUTSTANDING</u> Briefcased data all been <u>CHECKED-IN</u> prior to running the update on the Server?</p> | | | | |
|  <p>Have you completed a backup of the MT32 directory, and <u>ALL</u> databases located in the MT32\Data directory?</p> <p><u>Prior To</u> backing up (including copy or paste or move or rename) <u>ANY</u> database file, it is important that <u>Interbase Guardian and Server</u> have been <u>STOPPED</u> in order to avoid corruptions. Once the backup has been completed, Interbase Guardian and Server can be restarted.</p> <p>For detailed instructions, please refer to the following document on the Medtech32 V9.3.0 B4620 DVD: <u>\Documentation\Technical Instructions and Documentation\MT32 Backup & Maintenance Guidelines - V9.3.0.pdf</u></p> | | | | |
|  <p>Have you completed a <u>SUCCESSFUL</u> Database Maintenance (i.e. Interbase Backup and Restore) on <u>ALL</u> databases?</p> <p>By default this must include both <u>MT32.IB</u> and <u>BLOB.IB PLUS</u> ALL other databases you would like to upgrade (e.g. <u>Training.IB</u> and <u>TrainBLOB.IB</u> databases if you would like to keep them for training/testing. This includes ALL other additional pair of databases for each additional site/department.</p> <p>For detailed instructions, please refer to the following document on the Medtech32 V9.3.0 B4620 DVD: <u>\Interbase\Interbase XE Documentation\Interbase XE - Backup & Restore Instructions.pdf</u></p> | | | | |
|  <p>Have <u>ALL Users</u> <u>LOGGED OUT</u> of Medtech32 on <u>ALL</u> Server(s) and Clients – including remote users and any idle users in Remote Desktop or Citrix sessions?</p> | | | | |

| Server Prerequisite Checklist | Tick | Date / Time | Action By | Time Spent |
|--|------|-------------|-----------|------------|
|  Have all Medicare, DVA and private claims been transmitted electronically/closed successfully? | | | | |
|  Have ALL Services that require access to the databases been <u>STOPPED</u> ? E.g. Medtech Services (for ManageMyHealth, SMS and Portal), Medtech Data Transfer Service (for RxSQL Clinical Link), IIS Server (for Medtech Clinical Audit Tool), eRx Services, MediSecure Services, Medtech intergration Service and Fax service etc. | | | | |
|  Have ALL Applications that require access to the databases been <u>STOPPED</u> ? E.g. MedtechGlobalHIService (for NEHTA HI Service, SMD, PCEHR), eClinic SMSC Desktop, Pen Clinical Audit Tool, other Custom/Third Party Applications and Reporting Utilities not supplied by Medtech, etc. | | | | |
|  Have ALL Scheduled Tasks that require access to the databases been <u>STOPPED</u> ? E.g. Message Transfer Utility, Auto Scan from Folder, NPS RADAR Update/Submit, etc. | | | | |
|  Have ALL Routine Backup and Maintenance Tasks that require access to the databases been <u>STOPPED</u> ? E.g. Daily Database File Backup, Daily Interbase Database Sweep, Monthly Interbase Backup and Restore, etc. | | | | |

| Server Installation Checklist | Tick | Date /Time | Action By | Time Spent |
|--|------|------------|-----------|------------|
|  Final confirmation that <u>ALL</u> Briefcase Laptops with OUTSTANDING Briefcased data been CHECKED-IN prior to running the update on the Server? | | | | |
| 1. Install Medtech32 VERSION 9.3.0 Build 4620 on the Server. The step by step guide is located on the DVD\Documentation\Release Notes and Other Documentation\ <u>MT32 Information for Release and Installation - V9.3.0 B4620.pdf</u> . Under the heading Medtech32 Server Installation. This document is also available from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/ | | | | |
| 2. Install MedtechGlobalHIService – Please note that if you are already running the earlier CDA Bridge (MedtechGlobalHIService), then you must configure it for use in the new version of Medtech32. The step by step guide is located on the DVD\Documentation\Release Notes and Other Documentation\ <u>MT32 Release Notes - V9.3.0 B4620 MedtechGlobalHIService.pdf</u> . This document is also available from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/ Note: For any new installations of the MedtechGlobalHIService , please refer to the separate section later in this document. | | | | |
| Optional Installation Checklist | Tick | Time | Action By | Time? |
| 1. Install eRx e-Prescription – Please note that this is for NEW Installations only. Once installed, you must complete the additional configurations before being able to use the application. The step by step guide is located on the DVD\Documentation\Release Notes and Other Documentation\ <u>MT32 Release Notes - V9.3.0 B4620 eRx e-Prescription.pdf</u> . This document is also available from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/ | | | | |

| Server Installation Checklist | Tick | Date /Time | Action By | Time Spent |
|--|------|------------|-----------|------------|
| <p>2. Install Medisecure e-Prescription – Please note that this is for NEW Installations only. Once installed, you must complete the additional configurations before being able to use the application.</p> <p>The step by step guide is located on the DVD\Documentation\Release Notes and Other Documentation\<u>MT32 Release Notes - V9.3.0 B4620 Medisecure e-Prescription.pdf</u>. This document is also available from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</p> | | | | |
| <p>3. Install MT2PenCAT – Please note that for new installations, you must install and configure before being able to use the application. The step by step guide is located on the DVD\Documentation\Release Notes and Other Documentation\<u>MT32 Release Notes - V9.3.0 B4620 MT2PenCAT.pdf</u>.</p> <p>This document is also available from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</p> | | | | |
| <p>4. Install Medtech Fax Service. The step by step guide is located on the DVD\Documentation\Release Notes and Other Documentation\<u>MT32 Release Notes - V9.3.0 B4620 Fax Service.pdf</u>.</p> <p>This document is also available from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</p> | | | | |
| <p>5. Configure and setup Eclipse. The step by step guide is located on the DVD\Documentation\Release Notes and Other Documentation\<u>MT32 Release Notes - V9.3.0 B4620 Eclipse.pdf</u>.</p> <p>This document is also available from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</p> <p>Note: Eclipse is a separate Licenced Module. Please contact the Medtech Sales team for further information.</p> | | | | |

| Server Installation Checklist | Tick | Date /Time | Action By | Time Spent |
|--|------|------------|-----------|------------|
| 6. Enable After Hours Auto Billing – The step by step guide is located on the DVD\Documentation\Release Notes and Other Documentation\ <u>MT32 Release Notes - V9.3.0 B4620.pdf (under the heading “After hours – Auto Billing”).</u> This document is also available from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/ | | | | |

| Server Post Requisite Checklist | Tick | Date /Time | Action By | Time Spent |
|--|------|------------|-----------|------------|
| 1. If the Medtech32/Interbase Server is also serving as Microsoft Remote Desktop Services (formerly Terminal Services) and/or Citrix XenApp (formerly Presentation Server), ensure it is switched back to <u>EXECUTE MODE.</u> | | | | |
| 2. Restart ALL Services that have been <u>STOPPED</u> prior to the installation – e.g. Medtech Services (for ManageMyHealth, SMS and Portal), Medtech Data Transfer Service (for RxSQL Clinical Link), IIS Server (for Medtech Clinical Audit Tool), eRx Services, MediSecure Services, Medtech intergration Service and Fax service etc. | | | | |
| 3. Restart ALL Applications that have been <u>STOPPED</u> prior to the installation – e.g. Medtech MedtechGlobalHIService (for NEHTA HI Service, SMD, PCEHR), eClinic SMSC Desktop, Pen Clinical Audit Tool, other Custom/Third Party Applications and Reporting Utilities not supplied by Medtech, etc. | | | | |
| 4. Resume ALL Scheduled Tasks that have been <u>STOPPED</u> prior to the installation – e.g. Message Transfer Utility, Auto Scan from Folder, NPS RADAR Update/Submit, etc. | | | | |
| 5. Resume ALL Routine Backup and Maintenance Tasks that have been <u>STOPPED</u> prior to the installation – e.g. Daily Database File Backup, Daily Interbase Database Sweep, Monthly Interbase Backup and Restore, etc. | | | | |
| 6. Ensure you can <u>SUCCESSFULLY</u> logon to the Medtech32 application from the Medtech32 Server <u>WITHOUT ANY ERRORS.</u> It is also recommended to briefly test the key features within Medtech32 to ensure you can view | | | | |

| | | | | |
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| future appointments (press F7), patient clinical records (press F6), patient accounts records (press Shift + F9), Medicare claiming records (press Ctrl + B), etc. | | | | |
|--|--|--|--|--|

Client MAOL Pre and Post Installation Checklist

| Client MAOL Prerequisite Checklist | Tick | Date/Time | Action by | Time Spent |
|--|------|-----------|-----------|------------|
| <p>MAOL Client Installation</p> <p>1. Install the Medtech32 Medicare Australia Online Client (MAOL) on ALL Client PC's that need to communicate to Medicare, DVA, NeHTA by following the step by step guide in the document <u>MT32 Information for Release and Installation - V9.3.0 B4620</u>, under the section Medicare Australia Online Client Installation.</p> <p>This document can also be downloaded from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</p> | | | | |
| <p>POST MAOL Installation</p> <p>1. Ensure ALL of the MAOL Clients are able to communicate with Medicare, DVA, NeHTA following the MAOL Client installation.</p> | | | | |

Client Pre and Post Installation Checklist

| Client Prerequisite Checklist | Tick | Date/Time | Action by | Time Spent |
|---|------|-----------|-----------|------------|
| <p>1. Ensure ALL Users have <u>LOGGED OUT</u> of Medtech32 on <u>ALL</u> Clients – including remote users and idle users in Remote Desktop or Citrix sessions.</p> | | | | |
| Client Installation Checklist | Tick | Date/Time | Action by | Time Spent |
| <p>1. Install Medtech32 Client Installation on a Client PC by following the step by step guide in the document <u>MT32 Information for Release and Installation - V9.3.0 B4620</u>, under the section Medtech 32 Client Installation. This document can also be downloaded from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-</p> | | | | |

| Client Prerequisite Checklist | Tick | Date/Time | Action by | Time Spent |
|---|------|-----------|-----------|------------|
| downloads-au/ | | | | |
| Client Post Requisite Checklist | Tick | Date/Time | Action By | Time Spent |
| 1. Ensure you can <u>SUCCESSFULLY</u> log on to the Medtech32 application from <u>EACH TYPE</u> of Client WITHOUT ANY ERRORS . This includes standard client workstations (i.e. fat clients), and those who connect via Remote Desktop or Citrix sessions (i.e. thin clients). | | | | |

MedtechGlobalHIService Checklist (For new installations only)

| Prerequisite Checklist | Tick | Date/Time | Action by | Time Spent |
|---|------|-----------|-----------|------------|
| 1. Before installing the latest MedtechGlobalHIService, you MUST ensure that you have your Medicare Certificates DVD and associated documentation available. <i>Please note that when upgrading MT32 from a version that already as “MedtechGobalHIService” you do NOT need to install certificates again. These steps are ONLY for New Installations of MT32</i> | | | | |
| 2. Before installing the latest MedtechGlobalHIService, you MUST ensure that the scheduled Old MedtechGlobalHIService (CDA Bridge) has been stopped . | | | | |
| 3. Install “MedtechGlobalHIServie” on the Server by following the step by step guide in the document <u>Medtech32 Release Notes - V9.3.0 B4620 MedtechGlobalHIService.pdf</u> located on the DVD | | | | |
| 4. After installing the latest MedtechGlobalHIService, you MUST restart the Scheduler with the new MedtechGlobalHIService. | | | | |

Briefcase Installation Checklist

| Briefcase Prerequisite Checklist | Tick | Date /Time | Action By | Time Spent |
|---|------|------------|-----------|------------|
| <p>1. Ensure the minimum version and build requirements are met.</p> <p>Your Briefcase Laptops MUST be on Medtech32 <u>VERSION 9.1.7 OR ABOVE</u> to install this Update. If you <u>ARE NOT</u> currently on this version or higher, please <u>DO NOT</u> continue.</p> <p>This can be checked by logging onto Medtech32 and selecting <i>Help ► About Medtech32</i>.</p> | | | | |
| <p>2. Ensure the person(s) who will be performing the installation has <u>READ THROUGH</u> the document <i>MT32 Information for Release and Installation - V9.3.0 B4620</i>. This document can also be downloaded from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</p> <p>This document contains valuable information that if not read could seriously affect the upgrade process and possible downtime of your network.</p> | | | | |
| <p>3. Ensure you are <u>ALWAYS</u> logged on to Windows with <u>ADMINISTRATIVE RIGHTS</u> when performing <u>ANY</u> installation, update or maintenance tasks.</p> | | | | |
| <p>4. "User Account Control" (UAC) MUST be <u>DISABLED</u> as a policy across <u>ALL</u> Briefcase Laptops that are running on <u>Windows Vista or Windows 7 or Windows 2008 or Windows 2008 R2</u>.</p> | | | | |
| <p>5. To avoid unnecessary problems during installation, upgrade, or maintenance, preferably you should <u>ALWAYS</u> log on to Windows in "Console Mode" – i.e. not through Remote Desktop or Citrix, but via alternative means that allows remote connection to the Console such as VNC, TeamViewer, etc.</p> | | | | |
| <p>6. Ensure you have <u>LOGGED OUT</u> of Medtech32 on <u>ALL</u> Briefcase Laptops.</p> | | | | |

| Briefcase Prerequisite Checklist | Tick | Date /Time | Action By | Time Spent |
|---|------|------------|-----------|------------|
| <p>7. Ensure <u>ALL</u> Briefcase Laptops with OUTSTANDING Briefcased data are CHECKED-IN prior to running the update on the Briefcase Laptops.</p> <p>All Briefcase Laptops MUST ALWAYS be on the SAME Medtech32 Version and Build and SAME Interbase Version as the Main Medtech32 Server. Otherwise data corruptions, and thus data loss, might occur during check-ins.</p> | | | | |
| <p>8. Disconnect the Briefcase Laptops from the Network.</p> | | | | |
| <p>9. Backup the existing <u>MT32.ini</u> configuration file on <u>EACH</u> Briefcase Laptop, which can be found under the "<u>MT32\Bin</u>" directory.</p> <p>Modify the <u>MT32.ini</u> configuration file by adding a leading Semicolon (;) to comment out the [IBx] section that points to <u>ANY Databases</u> on the Main Medtech32 Server, e.g. from [IB0] to; [IB0].</p> <p>Order the remaining [IBx] sections that point to <u>ANY LOCAL Databases</u> on the Briefcase Laptop in SEQUENTIAL ORDER, stating from [IB0], [IB1], [IB2] ... [IBn].</p> | | | | |

| Briefcase Installation Checklist | Tick | Date /Time | Action By | Time Spent |
|---|------|------------|-----------|------------|
| <p>1. Install Medtech32 VERSION 9.3.0 Build 4620 Update on <u>EACH</u> Briefcase Laptop by following the step by step guide in the document <u>MT32 Information for Release and Installation - V9.3.0 B4620</u>.</p> <p>This document can also be downloaded from the Medtech Support web site: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/</p> | | | | |

| Briefcase Post Requisite Checklist | Tick | Date /Time | Action By | Time Spent |
|---|------|------------|-----------|------------|
| 1. Reconnect the Briefcase Laptops to the Network. | | | | |
| 2. Use the <u>ORIGINAL COPY</u> of the <u>MT32.ini</u> configuration file for <u>EACH</u> of the Briefcase Laptop, to copy the Briefcase sections to the new MT32.ini file created during the installation. Modify the <u>MT32.ini</u> configuration file to include the Briefcase <u>[IBx]</u> sections from the original copy of the MT32.ini file that had been backed up. Note: Ensure that the order of the <u>[IBx]</u> sections that point to <u>ANY LOCAL Databases</u> on the Briefcase Laptop are in <u>SEQUENTIAL ORDER</u> , stating from <u>[IB0], [IB1], [IB2] ... [IBn]</u> . | | | | |
| 3. Once you have <u>SUCCESSFULLY</u> updated the Briefcase Laptops to the <u>SAME Medtech32 Version and Build</u> as the Main Medtech32 Server, you <u>MUST</u> then perform a <u>COMPLETE CHECK-OUT</u> on <u>EACH</u> Briefcase Laptop. All Briefcase Laptops <u>MUST ALWAYS</u> be on the <u>SAME Medtech32 Version and Build</u> and <u>SAME Interbase Version</u> as the Main Medtech32 Server. Otherwise data corruptions, and data loss, might occur during check-outs. | | | | |
| 4. Ensure you can <u>SUCCESSFULLY</u> log on to the Medtech32 application from <u>EACH</u> Briefcase Laptop <u>WITHOUT ANY ERRORS</u> . This includes logging onto both the <u>LOCAL Briefcased Database</u> on the Briefcase Laptop, and <u>ALL Databases</u> on the Main Medtech32 Server. It is also recommended to briefly test the key features within Medtech32 in the <u>LOCAL Briefcased Database</u> on <u>EACH</u> Briefcase Laptop to ensure you can view: <ul style="list-style-type: none"> • future appointments (press F7) • patient clinical records (press F6), • patient accounts records (press Shift + F9), Medicare claiming records (press Ctrl + B) • Any other functionality being used daily, etc. | | | | |

| Briefcase Post Requisite Checklist | Tick | Date /Time | Action By | Time Spent |
|--|------|------------|-----------|------------|
| <p>5. Once logged on to the <u>LOCAL Briefcased Database</u> on <u>EACH</u> Briefcase Laptop, verify that it is running in 'Briefcase Mode' by checking the description of the <u>Main Application Title</u> at the very top of the Medtech32 application, which should display: "Customer Name [Briefcasing]".</p> <p>If the <u>Main Application Title</u> does not display [Briefcasing] after the Customer Name, it means the Briefcase Check-out has failed and you should contact the Medtech Helpdesk for assistance.</p> | | | | |

If there are any issues in any of the Installations associated with this Release, please contact the **Medtech Helpdesk** on Tel: **1800 148 165 → Option 1** or Email: support@medtechglobal.com.