

Installation Checklist

Medtech32 Australia

Version 9.3.3 Build 4999

(April 2016 – Release 2)



IMPORTANT NOTE

WARNING: This checklist contains **MANDATORY** prerequisites which **MUST BE COMPLIED WITH** prior to installing **Medtech32 Version 9.3.3 Build 4999 (April 2016 – Release 2)**. 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 amongst all your internal IT staff or external IT service provider, and ensure the IT technician(s) responsible for the installation submit the completed checklist to the Practice Manager.

Contents

Server Installation Checklist 3

Briefcase Installation Checklist 10

Server Installation Checklist

| Server Prerequisite Checklist | Tick | Date / Time | Action By | Time Spent |
|--|------|-------------|-----------|------------|
| <p>Has the minimum version and build (<u>VERSION 9.3.1 Build 4711 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 <i>Medtech32 Technical Release Notes Version 9.3.3 Build 4999 (April 2016 – Release 2)?</i></p> <p>See: 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 "User Account Control" (UAC)</u> 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> | • | | | |
| <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>.</p> | • | | | |

| Server Prerequisite Checklist (cont'd) | Tick | Date/ Time | Action By | Time Spent |
|---|------|---------------|--------------|---------------|
| <p><u>ALL</u> Briefcase Laptops with OUTSTANDING Briefcased data have been CHECKED-IN prior to running the update on the Server.</p> | • | | | |
| <p>Have you completed a backup of the Medtech32 directory and <u>ALL</u> databases located in the Medtech32\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 Interbase Guardian and Server 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>Have you completed a SUCCESSFUL Database Maintenance (i.e. Interbase Backup and Restore) on <u>ALL</u> databases?</p> <p>By default this must include both MT32.IB and BLOB.IB, PLUS ALL other databases you would like to upgrade (e.g. Training.IB and TrainBLOB.IB databases if you would like to keep them for training/testing, and ALL additional pairs of databases for each additional site/department).</p> <p>The amount of free hard disk space required to perform the backup and maintenance on the Interbase Server should be at least THREE times the size of ALL databases you will be working with.</p> <p>For detailed instructions, please refer to the following document on the Medtech32 V9.2.0 B4361 DVD: "\Interbase\Interbase XE Documentation\Interbase XE - Backup & Restore Instructions.pdf"</p> | • | | | |
| <p>Have ALL Users <u>LOGGED OUT</u> of Medtech32 on <u>ALL</u> Server(s) and Clients – including remote users and idle users in Remote Desktop or Citrix sessions?</p> | • | | | |

| | | | | |
|--|---|--|--|--|
| <p>Are ALL Services that require access to the databases been STOPPED?</p> <p>For example, 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, etc.</p> | <ul style="list-style-type: none"> • | | | |
| <p>Have ALL Applications that require access to the databases been <u>STOPPED</u> ?</p> <p>For example, 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.</p> | <ul style="list-style-type: none"> • | | | |
| <p>Have ALL Scheduled Tasks that require access to the databases been <u>STOPPED</u>?</p> <p>For example, Message Transfer Utility, Auto Scan from Folder, NPS RADAR Update/Submit, etc.</p> | <ul style="list-style-type: none"> • | | | |
| <p>Have ALL Routine Backup and Maintenance Tasks that require access to the databases have been <u>STOPPED</u>?</p> <p>For example, Daily Database File Backup, Daily Interbase Database Sweep, Monthly Interbase Backup and Restore, etc.</p> | <ul style="list-style-type: none"> • | | | |

| Server Installation Checklist | Tick | Date /Time | Action By | Time Spent |
|--|------|------------|-----------|------------|
| 1. Install the Medtech32 VERSION 9.3.3 Build 4999 (April 2016 – Release 2) Update on the Server by following the step by step instructions in the document " <u>Medtech32 Technical Release Notes Version 9.3.3 Build 4999 (April 2016 – Release 2)</u> ", which can be downloaded from the Medtech Support website: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/ | • | | | |
| 2. 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 EXECUTE MODE . | • | | | |
| 3. 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, etc. | • | | | |
| 4. 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. | • | | | |
| 5. 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. | • | | | |
| 6. 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. | • | | | |

| Server Installation Checklist | Tick | Date /Time | Action By | Time Spent |
|---|------|------------|-----------|------------|
| <p>7. Ensure you can <u>SUCCESSFULLY</u> logon to the Medtech32 application from the Medtech32 Server <u>WITHOUT ANY ERRORS.</u></p> <p>It is also recommended to briefly test the key features within Medtech32 to ensure you can view future appointments (press F7), patient clinical records (press F6), patient accounts records (press Shift + F9), Medicare claiming records (press Ctrl + B), etc.</p> | • | | | |
| <p>8. ACIR and Immunisation Module Checks</p> <p>For ALL PRACTICES that use the Immunisation and ACIR Claims Module, it is critical that you check this functionality by providing an Ancillary Provider number for the site and have the nurse create and send the ACIR claim.</p> <p>Tick this off the checklist once completed.</p> | • | | | |

Client Pre- and Post-Installation Checklist

| Client Pre-Installation Checklist | Tick | Date /Time | Action By | Time Spent |
|--|------|------------|-----------|------------|
| 1. Ensure ALL Users have <u>LOGGED OUT</u> of Medtech32 on <u>ALL</u> Clients (remote users and idle users in Remote Desktop or Citrix sessions). | • | | | |

| Client Installation Checklist | Completed Date/Time | Completed By | Time Spent |
|-------------------------------|---------------------|--------------|------------|
| No changes required. | – | – | – |

| Client Post-Installation Checklist | Tick | Date /Time | Action By | Time Spent |
|---|------|------------|-----------|------------|
| 1. Ensure you can <u>SUCCESSFULLY</u> logon to the Medtech32 application from <u>EACH TYPE</u> of Client <u>WITHOUT ANY ERRORS</u> . Including standard client workstations (i.e. fat clients), and connections via Remote Desktop or Citrix sessions (i.e. thin clients). | • | | | |
| 2. ACIR and Immunisation Module Checks For ALL PRACTICES that use the Immunisation and ACIR Claims Module, it is critical that you check this functionality. Tick this off the checklist once completed. | • | | | |

Medicare Online Checklist

| Client Installation Checklist | Completed Date/Time | Completed By | Time Spent |
|--|---------------------|--------------|------------|
| No changes required if you have the latest PKI Certificate Version | – | – | – |

MedtechGlobalHIServices Checklist

| MedtechGlobalHIServices | Completed Date/Time | Completed By | Time Spent |
|---|----------------------------|---------------------|-------------------|
| No change if already on Medtech32 V9.3.1 B4711. | - | - | - |

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 VERSION 9.3.1 B4711 OR ABOVE to install this Update. If you ARE NOT 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 have READ THROUGH the document "<i>Medtech32 Technical Release Notes Version 9.3.3 Build 4999 (April 2016 – Release 2)</i>", which can be downloaded from the Medtech Support 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>3. Ensure you are <u>ALWAYS</u> logged onto Windows with ADMINISTRATIVE RIGHTS when performing <u>ANY</u> installation, update or maintenance tasks.</p> | • | | | |
| <p>4. "User Account Control" (UAC) MUST be DISABLED as a policy across <u>ALL</u> Briefcase Laptops that are running on Windows Vista or Windows 7 or Windows 2008 or Windows 2008 R2.</p> | • | | | |
| <p>5. To avoid unnecessary problems during installation, upgrade, or maintenance, preferably you should <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> | • | | | |

| Briefcase Prerequisite Checklist | Tick | Date /Time | Action By | Time Spent |
|--|------|------------|-----------|------------|
| 6. Ensure you have <u>LOGGED OUT</u> of Medtech32 on <u>ALL</u> Briefcase Laptops. | • | | | |
| 7. Ensure <u>ALL</u> Briefcase Laptops with <u>OUTSTANDING</u> Briefcased data are <u>CHECKED-IN</u> prior to running the update on the Briefcase Laptops. 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 thus data loss, might occur during check-ins. | • | | | |
| 8. Disconnect the Briefcase Laptops from the Network. | • | | | |
| 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. (If applicable): 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] . Order the remaining [IBx] sections that point to <u>ANY LOCAL Databases</u> on the Briefcase Laptop in <u>SEQUENTIAL ORDER</u> , starting from [IB0], [IB1], [IB2] ... [IBn] . | • | | | |

| Briefcase Installation Checklist | Tick | Date /Time | Action By | Time Spent |
|--|------|------------|-----------|------------|
| 1. Install the Medtech32 VERSION 9.3.3 Build 4999 (April 2016 – Release 2) Update on <u>EACH</u> Briefcase Laptop by following the step by step instructions in the document " <u>Medtech32 Technical Release Notes Version 9.3.3 Build 4999 (April 2016 – Release 2)</u> ", which can be downloaded from the Medtech Support website: http://www.medtechglobal.com/au/support-au/mt32-downloads-au/ | • | | | |

| Briefcase Post-Installation Checklist | Tick | Date /Time | Action By | Time Spent |
|--|------|------------|-----------|------------|
| 1. Reconnect the Briefcase Laptops to the Network. | • | | | |
| 2. Revert back to the ORIGINAL COPY of <u>MT32.ini</u> configuration file on <u>EACH</u> Briefcase Laptop. | • | | | |
| 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 COMPLETE CHECK-OUT on <u>EACH</u> Briefcase Laptop. All Briefcase Laptops <u>MUST ALWAYS</u> 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-outs. | • | | | |

| Briefcase Post-Installation Checklist | Tick | Date /Time | Action By | Time Spent |
|---|------|------------|-----------|------------|
| <p>4. Ensure you can <u>SUCCESSFULLY</u> logon to the Medtech32 application from EACH Briefcase Laptop WITHOUT ANY ERRORS. 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.</p> <p>It is also recommended to briefly test the key features within Medtech32 in the LOCAL Briefcased Database on <u>EACH</u> Briefcase Laptop to ensure you can view future appointments (press F7), patient clinical records (press F6), patient accounts records (press Shift + F9), Medicare claiming records (press Ctrl + B), etc.</p> | • | | | |
| <p>5. Once logged onto 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> | • | | | |

For further information on this release, or any other queries regarding **Medtech32 Version 9.3.3 Build 4999 (April 2016 – Release 2)**, please feel free to contact the **Medtech Helpdesk** via email support@medtechglobal.com or by phoning us on **1800 148 165 → Option 1**.