



# CGM MEDISOFT Client/Server Installation Guide

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December 2022

**CGM MEDISOFT**

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Practice Management and EHR

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## **Product**

CGM MEDISOFT 27

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# Chapter 1 - CGM MEDISOFT Installation Overview

NOTE: CGM MEDISOFT® 27 uses Advantage 11.10. If you are upgrading, you MUST install Advantage 11.10. Once you have installed Advantage 11.10, you will not be able to access an Advantage Server that is prior to Advantage 11. You will be able to access your database as long as your database server is at least Advantage 11.

## CGM MEDISOFT 27 Supported Operating Systems

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NOTE: CGM MEDISOFT 27 is a 32-Bit application, and on a supported 64-Bit platform, the application will run in a 32-Bit mode.

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### Windows 11 Support

CGM MEDISOFT 27 is supported on Windows 11 Pro and Enterprise.

OPERATING SYSTEM	SERVER		WORKSTATION	
	Version of CGM MEDISOFT 27		Version of CGM MEDISOFT 27	
	Network Professional	Single-User or Advanced	Network Professional	Single-User or Advanced
Windows Server 2012 and R2***	Y	N/A	Y	N/A
Windows Server 2016 Standard, Datacenter, Essentials	Y	N/A	Y	N/A
Windows Server 2019 Standard	Y	N/A	Y	N/A
Windows 10 Pro, Enterprise* Windows 11 Pro, Enterprise**	Y	Y	Y	Y

\*Windows 10 S and Home are NOT supported.

\*\*Windows 11 Home is NOT supported.

\*\*\*Microsoft support end of life is October 10, 2023

**NOTE: End of life cycle for Practice Partner (CGM MEDISOFT Clinical) 11.1 will be 12/31/2020. eMDs will no longer support versions of CGM MEDISOFT Clinical with Practice Partner 11.1 after that date.**

CGM MEDISOFT will not support Windows RT on the ARM processor.

## CGM MEDISOFT Hardware Requirements

### Workstation (minimum required)

CPU (Processor)	Intel Core i3 or higher
RAM (Memory)	4 GB or greater
Storage Space	128 GB drive or greater (minimum 30GB of available space) *
Network Card (NIC)	Wired 1Gbps Connection (no wireless)
Display Monitor	1024x768 (1280x800 for widescreen displays)
Computer Type	Business grade desktop or laptop
Internet	Required. High-speed Fiber, Cable, DSL, or Satellite Internet service

### Workstation (Recommended specifications)

CPU (Processor)	Intel Core i5 or higher
RAM (Memory)	8 GB or greater
Storage Space	256 GB Solid State Drive (SSD) or greater (minimum 30GB available space) *
Network Card (NIC)	Wired 1Gbps Connection (no wireless)
Display Monitor	1024x768 (1280x800 for widescreen displays)
Computer Type	Business grade desktop or laptop
Internet	Required. High-speed Fiber, Cable, DSL, or Satellite Internet service

### Server (Minimum Required)-Network Professional

CPU (Processor)	Intel i5 or higher
RAM (Memory)	8 GB or greater
Storage Space	256 GB drive or greater (minimum 50GB available space) *
Network Card (NIC)	Wired 1Gbps Connection (no wireless)
Display Monitor	1024x768 (1280x800 for widescreen displays)
Computer Type	Business grade desktop or laptop
Internet	Required. High-speed Fiber, Cable, DSL, or Satellite Internet service

\*Your database will grow as you add data to your practice, increasing the amount of space needed on the hard drive.

Advantage Database Server 11.10 is required for CGM MEDISOFT 27. eMDs recommends if you have a 64-bit computer, use 64 bit Advantage.

## Server (Recommended specifications)-Network Professional

CPU (Processor)	Intel Xeon or higher
RAM (Memory)	16 GB or greater
Storage Space	256 GB Solid State Drive (SSD) or greater (minimum 50GB available space) *
Network Card (NIC)	Wired 1Gbps Connection (no wireless)
Display Monitor	1024x768 (1280x800 for widescreen displays)
Computer Type	Business grade server
Internet	Required. High-speed Fiber, Cable, DSL, or Satellite Internet service

\*Your database will grow as you add data to your practice, increasing the amount of space needed on the hard drive.

Advantage Database Server 11.10 is required for CGM MEDISOFT 27. eMDs recommends if you have a 64-bit computer, use 64 bit Advantage.

### Regarding Advantage user licenses:

The Advantage Local Server allows both single-user and multiple-user access to data files. The Advantage Local Server file that is installed with Advantage client products contains a physical limitation such that only five or fewer users can concurrently access any table. This limitation was implemented to allow developers the ability to encourage their customers to upgrade to the Advantage Database Server client/server solution when more than five concurrent users were being used so as to reduce data corruption, increase application performance, and reduce support costs. If you wish to have more than five concurrent users accessing data via the Advantage Local Server, inquire about such support with your Value Added Reseller.

Note: CGM MEDISOFT requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use CGM MEDISOFT for up to 30 days without your Internet connection. After this, you will receive a warning message that you have seven days to connect before you are locked out of CGM MEDISOFT.

## Server (Recommended)-Network Professional

CPU (Processor)	Intel i3 or higher
RAM (Memory)	8GB
Storage Space	40GB*
Optical Drive	DVD-ROM (required if installing from a CD)
Network Card (NIC)	1Gbps
Display Monitor	1024x768 (1280x800 for widescreen displays)

Note: CGM MEDISOFT requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use CGM MEDISOFT for up to 30 days without your Internet connection. After this, you will receive a warning message that you have seven days to connect before you are locked out of CGM MEDISOFT.

\*Your database will grow as you add data to your practice, increasing the amount of space needed on the hard drive.

Advantage Database Server 11.10 is required for CGM MEDISOFT 27. eMDs recommends if you have a 64-bit computer, use 64 bit Advantage.

## Server Operating System – Supported

- Windows 10 Pro and Enterprise\*
- Windows 11 Pro and Enterprise\*\*
- Windows Server 2012 (64 Bit) and R2 (64-Bit) Microsoft support end of life is October 10, 2023)
- Windows Server 2016 Standard (64 Bit), Datacenter, Essentials
- Windows Server 2019 Standard

\*Windows 10 S and Home are NOT supported

\*\*Windows 11 Home is NOT supported

## Recommendation:

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of the Medisoft Root Data (which includes SharedData tables) and store it safely offsite. In this way, in case your server fails, or you have to set up a new server, you can restore your registration information from that Root Data backup. Registration of CGM MEDISOFT is tied to the server, so if you do not have your Medisoft Root Data backed up, you will need to contact Support to assist in getting your registration reactivated. (This process can take an extended time.) Perform this backup in addition to the verifiable daily practice files backup, which should be safely stored offsite.



# Important New Backup Information

**IMPORTANT:** It is highly recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Medisoft Root data (which includes SharedData tables) and store it safely offsite. In this way, in case your server fails or you have to set up a new server, you can restore from that Root Data backup. Registration of CGM MEDISOFT is tied to the server, so if you do not have your Medisoft Root Data backed up, you will need to contact CGM Support to get your registration deactivated so it can be entered again. Perform this one-time backup in addition to the daily practice files backup, which should be performed and stored offsite. Under the new licensing model, the software may only be installed on one server. If the software is installed on additional servers, an error message will appear informing you that the customer is already registered and it will not be functional.

## Scanning

The scanning feature requires the use of a TWAIN-compatible scanner.

For reference, the following scanners were used in successful testing of the scanning feature. This is not an exclusive list and other TWAIN-compatible card scanners may also be compatible.

- Brother DS Mobile 700D
  
- ScanShell 800DX and 800DXN
- ScanShell 800N, 800R, 800NR
- ScanShell 1000N, 1000A, 1000NA
- ScanShell 2000N
  
- Ambir DS490-i
- Ambir DS687
- Ambir PS667
- Ambir PS600
  
- TTScanner
  
- Fujitsu 6130

- Fujitsu 6130z
- Brother MFC 8680DN
- Canon PIXMA MX 452
- QMB MasterScan via TSScan

Important notes:

- eMDs does not provide support for individual scanner hardware or software questions.
- if you are working with Terminal Services or a Remote Desktop Protocol, you will need additional software to connect a scanner to CGM MEDISOFT, such as TSscan. Also, eMDs recommends that you close CGM MEDISOFT prior to disconnecting a remote session.
- Be sure to set up and install the scanner on your computer or network before attempting to scan images from within CGM MEDISOFT.
- eMDs recommends that you use a dedicated insurance card scanner for scanning insurance cards.
- It is always a good idea to calibrate the scanner after it is installed and clean it according to the manufacturer's recommendation.

## MPIC System Requirements

### Hardware requirements

CPU (Processor)	Equivalent of Intel Quad Core Xeon 1.6GHz
RAM (Memory)	8GB
Storage Array Type	RAID-1
Optical Drive	DVD-ROM
Network Card (NIC)	1Gbps (cannot be a teamed network card)
Hard Drive	At least 30GB

### Software requirements

eMDs recommends that you install it on the same computer as your Advantage Database Server. It does not need to be installed on any of your workstations. Nor does it have to be dedicated.

You may use a virtual server with MPIC.

## With Practice Partner 11.2 and newer

- Windows Server 2012 and R2 (Microsoft support end of life is October 10, 2023)
- Windows Server 2016 Standard, Datacenter, Essentials
- Windows Server 2019 Standard
- Medisoft 19 SP1 or newer
- SQL Server Express 2017 or 2019\*

\*SQL server express is NOT installed with MPIC. For Medisoft, you will need to download SQL Server Express. You can download version 2017 from here:

- <https://www.microsoft.com/en-us/sql-server/sql-server-2017>

## Firewall settings

The following Platform Services APIs must all be allowed:

identity.emdscloud.com	eligibilitybenefits.emdscloud.com
licensing.emdscloud.com	ppsmobile.emds.com
terminology.emdscloud.com	api.emdscloud.com

In addition, the two below are required if you are using CGM CONNECTION:

<https://cnx.cgmus.com/>

<https://cnx-mh.cgmus.com/>

## Anti-Virus Software

An anti-virus solution should be installed with the CGM-recommended configurations. The application folder and client folder must be excluded from real-time/on-access scanning. CGM recommends scheduled scans when users are not in the system. Ensure that exclusions are set properly. CGM recommends turning off Windows Defender and other anti-virus programs during the CGM MEDISOFT installation, and with Revenue Management (RM) installation and updates, otherwise it may interact with files and some files may not get installed. Any anti-virus solution that does not allow for exclusions should not be installed. If asked by Support, you must be able to show the exclusions.

## Advantage Database Licenses and Interfaces/Integrations:

For CGM MEDISOFT Network Professional, interfaces/integrations will utilize an Advantage Database (ADS) license for that interface. This has not changed from previous CGM MEDISOFT versions. This includes CGM MEDISOFT Mobile, CGM MEDISOFT+CGM PLUS interface, CGM MEDISOFT EHR (Medisoft Clinical) interface, MPIC, CGM MEDISOFT+CGM APRIMA interface, CGM CONNECTION interface, and Medisoft Online Scheduling. These interfaces are not available in Medisoft Basic and Medisoft Advanced so Advantage Database licensing is not affected.

If using multiple interfaces/integrations, as long as they are on the same server/PC, any applications that accesses the Advantage Database should share the 1 license being utilized. This means users should make certain that they have enough Advantage Database licenses for their regular users, plus at least one additional license for other interfaces/integrations.

## Installation Overview

This document contains instructions for all versions of CGM MEDISOFT 27 including CGM MEDISOFT Reports Professional. Carefully review the instructions for your version of CGM MEDISOFT 27 and hardware and software requirements before installing the software.

If you purchased CGM MEDISOFT 27 Single User or Advanced, see [“Installation Instructions for CGM MEDISOFT Single User and Advanced”](#) on page 9.

If you purchased CGM MEDISOFT 27 Network Professional, see [“Installation Instructions for CGM MEDISOFT Network Professional”](#) on page 13

If you purchased CGM MEDISOFT Reports Professional, see [“Installation Instructions for Medisoft Reports Professional”](#) on page 17.

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Only the installation of CGM MEDISOFT Network Professional requires pre-installation setup of a network, as well as installation on both the server computer and the workstations.

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If you receive an error trying to open a PDF file or to install Adobe Reader, go to the Adobe web site and download the latest version of Adobe Reader.

# Chapter 2 - Installation Instructions for CGM MEDISOFT Single User and Advanced

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**WARNING:** If you are installing over a previous version of CGM MEDISOFT, it is very important that you back up your data. Refer to the CGM MEDISOFT Online Help for instructions on backing up your data.

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Users must have at least WRITE permission to this directory, as well as the User directory (usually c:\Documents & Settings\All Users\Application Data\MEDISOFT), or you may receive errors when you start CGM MEDISOFT.

## Prior to Installation - Upgrades

CGM recommends that you always install successive versions of the software when upgrading to ensure proper registration and data conversion. For instance,

If you are currently on version 25 and are upgrading to 27, be sure to upgrade to 26 FIRST, register and convert your practice data. Then, from version 26 upgrade to 27.

**IMPORTANT;** If you send appointments to CGM CONNECTION, read the release notes for Medisoft 27 BEFORE upgrading for actions you may need to take before you upgrade.

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If you are upgrading from CGM MEDISOFT 18 or earlier, please read the following section that pertains to ICD-10 codes.

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## Prepare Diagnosis Codes for Conversion and Entry of ICD-10 Codes

The Centers for Medicare and Medicaid Services (CMS) is adopting a new system of diagnosis codes, to go into effect October 1, 2014. This new system, ICD-10 (International Classification of Diseases, 10th revision), will provide 68,069 diagnosis codes for expanded, more detailed coding and billing. CGM MEDISOFT provides the ability to store and use ICD-10 codes on new claims for your practice.

In CGM MEDISOFT Client, print the Diagnosis Code grid as a reference for your existing diagnosis codes.

When CGM MEDISOFT 27 is installed, all values in the Code 1 field will be copied to the ICD-9 field (formerly the Code 2 field), IF the field was empty. If the ICD-9 field was populated, no change will be made. In addition, the ICD-10 field (formerly the Code 3 field) will be cleared. Any ICD-10 codes or other values that had been in this field must be re-entered after conversion to CGM MEDISOFT. In addition, you must change all values in the ICD-9 field (formerly Code 2) if the information copied from the Code 1 field during conversion is not a valid ICD-9 code.

# Standard Installation

1. Disable UAC and any anti-virus applications before installing. Be sure to re-enable them after installation.
2. Download the ISO for CGM MEDISOFT from the CGM MEDISOFT and CGM MEDISOFT Clinical Download Links page in Support Center.
3. Open the ISO and launch autorun.exe. The Installation screen appears. eMDs recommend that you do NOT attempt to install using any of the programs with the extension \*.msi, such as setup.msi. Doing so may result in failure of the installation. Always use autorun.exe.
4. On the Installation screen, click **Install CGM MEDISOFT**. The Welcome screen appears.
5. Click the **Next** button. The End User License Agreement appears.
6. Click the **I Accept the agreement** radio button.
7. Click the **Next** button. The Program Selection screen appears. On the Program Selection screen, select the Installation type by clicking the button next to the type of product you purchased.
8. Click the **Next** button. The Select Installation Type screen appears.
9. Click the **Express Install (Recommended)** button.
10. Click the **Next** button. The Select Destination Directory screen appears. Click Browse if you want to change the location of the CGM MEDISOFT files on your hard drive. eMDs recommends that you leave the default setting.
11. Click the **Next** button. The Ready to Install screen appears.
12. Click the **Next** button. The Installing screen appears and tracks the progress of the installation.
13. The Installation Completed screen appears.
14. Click the **Finish** button. The installation program closes.  
Option: on the Installation Completed screen, select the Launch CGM MEDISOFT Patient Accounting box. Click the **Finish** button.

The first time CGM MEDISOFT opens after an upgrade a data conversion message appears. Consider backing up data before completing data conversion. If you are working with multiple practices, each time you open a new practice that particular practice also needs to be converted until all practices have been converted to the current version.

After installation and after CGM MEDISOFT launches for the first time, the Registration screen appears.

## Account Registration screen

Enter the information on this screen that you received from your VAR (Value-Added Reseller). Once this is done, you can use CGM MEDISOFT.

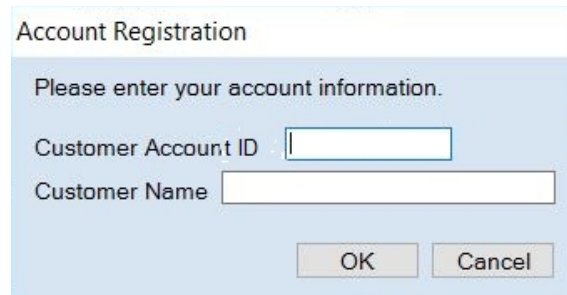


Figure 1. Account Registration screen

### Recommendation

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Medisoft Root data (which includes SharedData tables) and store it safely offsite. In this way, in case your server fails or you have to set up a new server, you can restore from that Root Data backup. Registration of Medisoft v27 is tied to the server, so if you do not have your Medisoft Root Data backed up, you will need to contact your VSE or Support to get your registration reactivated. Perform this one-time backup in addition to the daily practice files backup, which should be performed and stored offsite.

Under the new licensing model, the software may only be installed on one server. If the software is installed on additional servers, an error message will appear informing you that the customer is already registered and it will not be functional.

---

**IMPORTANT:** The Customer Account ID IS case-sensitive!

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Note: CGM MEDISOFT requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use CGM MEDISOFT for up to 30 days without your Internet connection. After this, you will receive a warning message that you have seven days to connect before you are locked out of CGM MEDISOFT.

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### Account Registration Process Troubleshooting

If you have verified that you do not have a prior installation of Medisoft 27 on your server and have ensured that the IsRegistered check box is removed, but still receive the following error that the Salesforce account is already registered:



Figure 2. Error message

Then, check for a firewall or router that may be blocking some of the Platform Services APIs. The following must all be allowed:

identity.emdscloud.com	eligibilitybenefits.emdscloud.com
licensing.emdscloud.com	ppsmobile.emds.com
terminology.emdscloud.com	api.emdscloud.com

In addition, the two below are required if you are using CGM CONNECTION:

<https://cnx.cgmus.com/>

<https://cnx-mh.cgmus.com/>

## Passwords

Password requirements include:

- Required passwords for all users, including a single user. Currently, you can set up a CGM MEDISOFT practice with no password. In CGM MEDISOFT 27, however, a password is required for access to data for all versions of CGM MEDISOFT.
- A password must be at least 8 characters in length. It can contain numbers or alpha characters and IS now **case-sensitive**.
- If you try to save a password that doesn't meet the requirements, you will receive a warning.

## New practices

When you create a new practice, a system/administrator **user with** a password with access level of 1(all access) is automatically created for you. The user name for this password is SYSTEM and the password is MEDISOFT1 (all capital letters).

This new login has been added to the Tutorial database and will be added to any practice upon upgrade without any active users.

To create a new practice,

1. In CGM MEDISOFT, select File > New Practice. The Create a New Set of Data screen opens.
2. Enter the practice name and data path.
3. Click Create.



# Chapter 3 - Installation Instructions for CGM MEDISOFT Network Professional

## Installing the Advantage Database Server

You must have administrative privileges to complete the installation.

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You must complete the installation or upgrade of the Advantage Database Server for CGM MEDISOFT 27.

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### Pre-Server Installation Setup

1. Designate a computer as the server. Use this server for storing your data. **NOTE:** Do not also use the server as a workstation.
2. Create a folder for the root data path (that is, Medidata). Use the UNC (Universal Naming Convention) address to designate the shared folder (for example, \\ServerName\FolderName).
3. Set up file sharing on the designated server. For more information on configuring file sharing on a server, review the documentation provided for your server computer.

To share the root data folder, open Windows Explorer and select the root data folder. Select **Sharing and Security**. On the Sharing tab, click **Share this folder** and click the **Permission** button. Select **Full Control**. Click the **OK** button. Click the **OK** button.

4. Map your workstations to the server computer so they can access the CGM MEDISOFT data folder.

### Server Installation Setup

1. If you are not installing over a previous version of Advantage go to Step 6.
2. If you are installing over a previous version of Advantage, click **Start** and navigate to the Control Panel.
3. From the Control Panel, select the **Performance and Maintenance** option.
4. Select **Administrative Tools** and then **Services**.

Depending on your version of the screens operating system and if you are using the Classic view option, the Performance and Maintenance option does not always appear. In this case, go to the Administrative Tools option.

5. Find Advantage Database Server and right-click. Select **Stop**.
6. Open the downloaded file. The Installation screen appears.

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eMDs recommends that you do NOT attempt to install using any of the programs with the extension \*.msi, such as setup.msi. Doing so may result in failure of the installation. Always use autorun.exe.

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7. Click the **Advantage Tools** link.

8. Click the **Advantage Server** link. The Advantage Database Server for Windows v11.10 screen appears.
9. Click the **Next** button. The License Agreement screen appears.
10. Select the **I accept the terms in the license agreement** button.
11. Click the **Next** button. The Destination Folder screen appears.
12. Select a directory for the Advantage Database Server installation. The default location is the recommended choice.

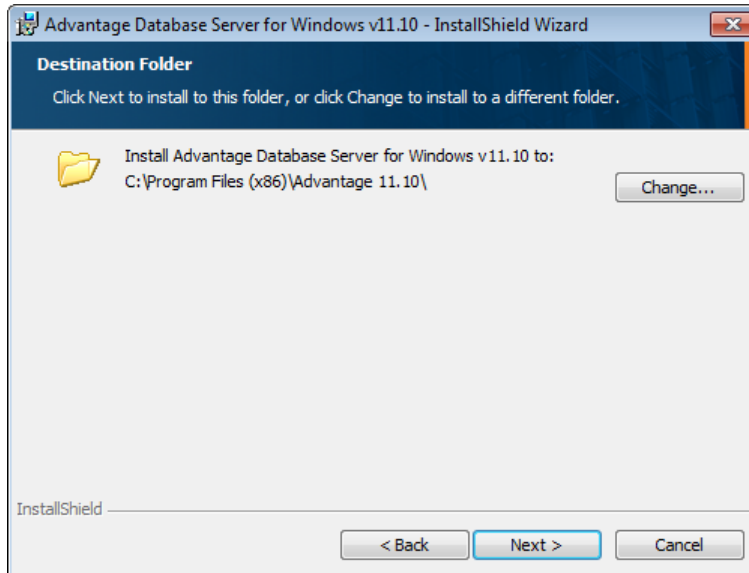


Figure 3. Destination Folder screen

13. To select the default location, click the **Next** button. The Ready to Install the Program screen appears.

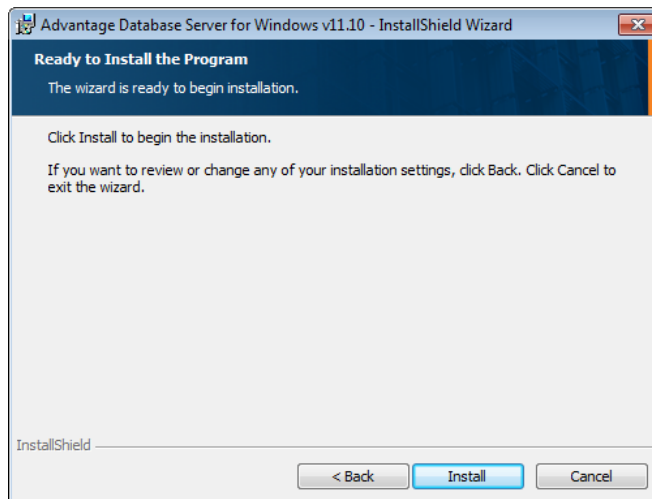
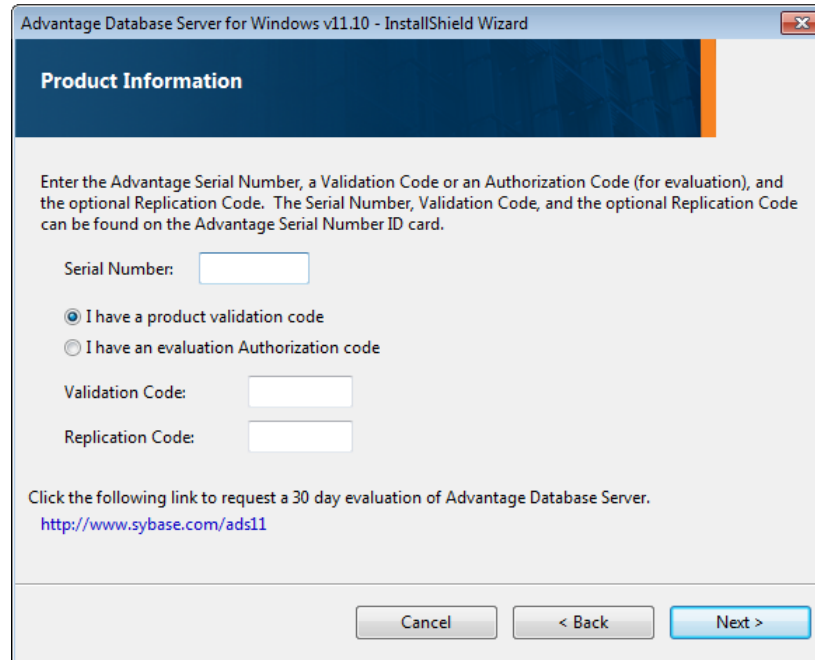


Figure 4. Ready to Install the Program screen

**Option:** click the **Change** button to select a different directory other than the default selection. On the Change Current Destination Folder screen, navigate to the desired location. Then click the **OK** button. On the Destination Folder screen, click the **Next** button.

14. Click the **Install** button. A progress bar appears tracking the installation. The Product Information screen appears.
15. Enter the Advantage serial number. Select the **I have a product validation code** button. In the Validation Code field, enter the validation code. Refer to the Advantage Certificate of Authenticity included with the installation materials for the serial number and validation code.



Advantage Database Server for Windows v11.10 - InstallShield Wizard

### Product Information

Enter the Advantage Serial Number, a Validation Code or an Authorization Code (for evaluation), and the optional Replication Code. The Serial Number, Validation Code, and the optional Replication Code can be found on the Advantage Serial Number ID card.

Serial Number:

I have a product validation code  
 I have an evaluation Authorization code

Validation Code:

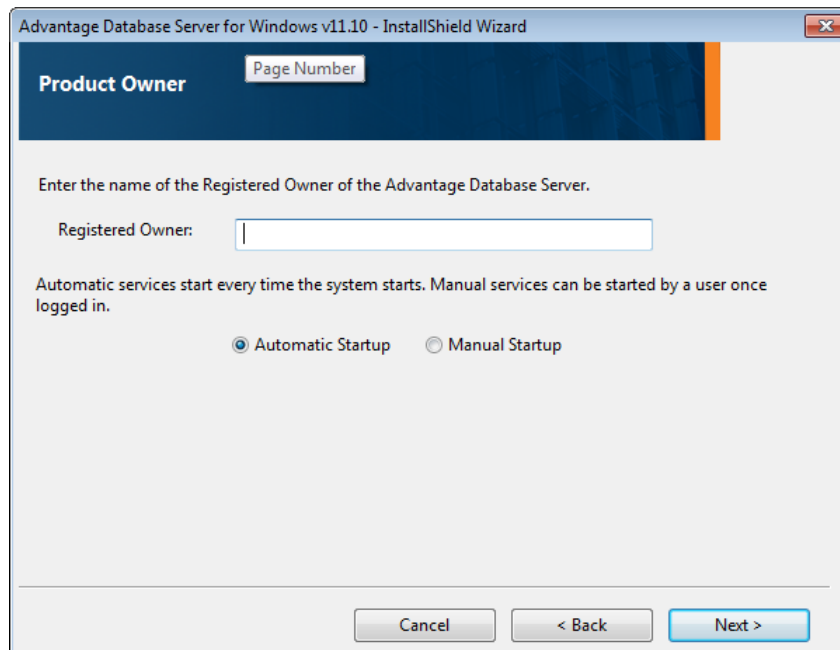
Replication Code:

Click the following link to request a 30 day evaluation of Advantage Database Server.  
<http://www.sybase.com/ads11>

Cancel < Back Next >

Figure 5. Product Information screen

16. Click the **Next** button. The Product Owner screen appears.



Advantage Database Server for Windows v11.10 - InstallShield Wizard

### Product Owner

Page Number

Enter the name of the Registered Owner of the Advantage Database Server.

Registered Owner:

Automatic services start every time the system starts. Manual services can be started by a user once logged in.

Automatic Startup  Manual Startup

Cancel < Back Next >

Figure 6. Product Owner screen

17. Enter the name of the registered owner. Select the **Automatic Startup** button.
18. Click the **Next** button. The ANSI Character Set screen appears.

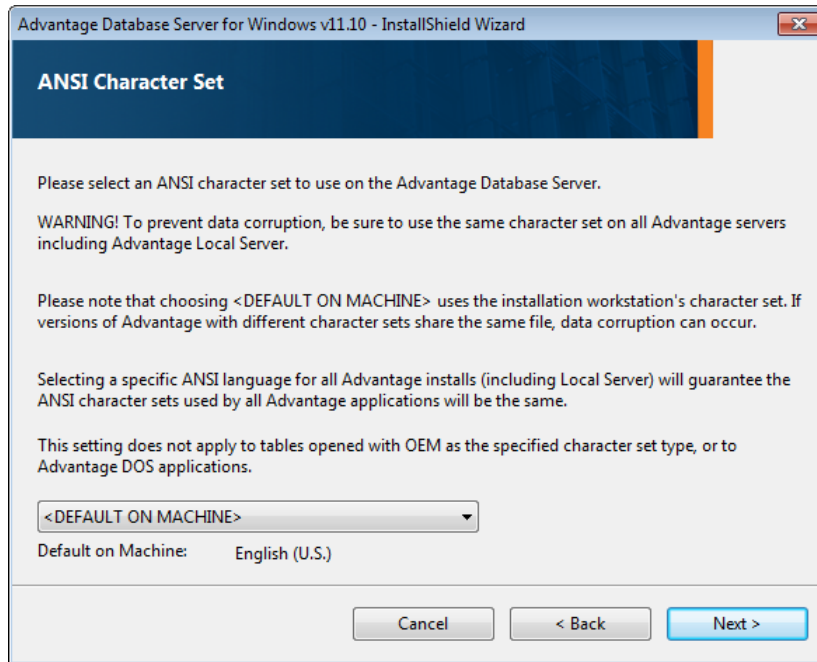


Figure 7. ANSI Character Set screen

19. Select from the drop-down list an appropriate character set. The recommended choice is the default selection, **ENGL(AMER)**, for American English.
20. Click the **Next** button. The OEM Localized Character Sets screen appears.
21. Click the **Next** button. The Installation Complete screen appears.
22. Click the **Finish** button.  
If an Advantage Configuration Utility screen is open, click Exit.

Option: On the CGM MEDISOFT Installation screen, click the Exit link or continue other installation processes.

## Installing CGM MEDISOFT Network Professional

Users must have at least WRITE permission to this directory, as well as the User directory (usually c:\Documents & Settings\All Users\Application Data\MEDISOFT), or you may receive errors when you start CGM MEDISOFT.

Disable the UAC prior to installing on the workstation. Be sure to re-enable it after installation. In addition, disable any anti-virus applications prior to installing and re-enable them after installation.

## Installing CGM MEDISOFT on Each Workstation

1. Download the ISO for CGM MEDISOFT from the CGM MEDISOFT and CGM MEDISOFT Clinical Download Links page in Support Center.

2. Open the ISO and launch autorun.exe. The Installation screen appears. eMDs recommends that you do NOT attempt to install using any of the programs with the extension \*.msi, such as setup.msi. Doing so may result in failure of the installation. Always use autorun.exe.
3. On the Installation screen, click **Install CGM MEDISOFT**. The Welcome screen appears.
4. Click the **Next** button. The End User License Agreement appears.
5. Click the **I Accept the agreement** button.
6. Click the **Next** button. The Program Selection screen appears.
7. Select the **Installation type**.
8. Click the **Next** button. The Select Installation Type screen appears.
9. Click the **Express Install (Recommended)** button.
10. Click the **Next** button. The Select Destination Directory screen appears. If you want to change the default, click Browse. CGM eMDs recommends that you leave the default setting.
11. Click the **Next** button. The Ready to Install screen appears.
12. Click the **Next** button. The Installing screen appears and tracks the progress of the installation.
13. The Installation Completed screen appears.
14. Clear the check box to launch CGM MEDISOFT immediately.
15. Click the **Finish** button. The installation program closes.
16. Repeat these steps for each client workstation.

## After Installation - Upgrading

### **Converting data**

Prior to launching CGM MEDISOFT, you must stop two services. To do so:

1. Click the **Start** button.
2. Enter services in the Search programs and files field.
3. Press **Enter**. The Component Services screen appears.
4. Click Services (local). The list of services appears.
5. Find eMDs MSL Connectivity Service. Right-click and select Stop.
6. Find MPIC service. Right-click and select Stop.
7. Launch CGM MEDISOFT, open your practice, and allow it to convert the data.
8. Return to the Component Services screen and restart eMDsMSLService and MPIC service.

The new claim delivered with v20 is already set to use the ICD-9 or ICD-10 fields.

# Accessing and Registering CGM MEDISOFT from the Workstation

When you purchased CGM MEDISOFT Network Professional, you also purchased a number of connections for your network.

After CGM MEDISOFT has been installed on each computer, run the program on any workstation. The first time the program opens, a data conversion message appears if you are upgrading. Consider backing up data before completing data conversion. Once the conversion is completed from the first workstation, CGM MEDISOFT will open normally on the remaining workstations.

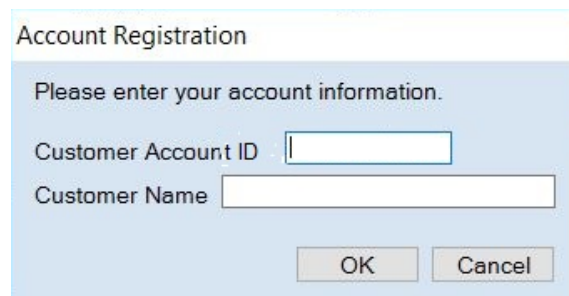
If you are installing for the first time, you will specify to create a new practice and tell CGM MEDISOFT to place the data files on the shared folder on the server that you created in [“Pre-Server Installation Setup”](#) on page 13.

If you are working with multiple practices, each time you open a new practice that particular practice also needs to be converted until all practices have been converted to the current version.

After installation and after CGM MEDISOFT launches for the first time, the Registration screen appears.

## Account Registration screen

Enter the information on this screen that you received from your VAR (Value-Added Reseller). Once this is done, you can use CGM MEDISOFT.



The screenshot shows a dialog box titled "Account Registration". The background is light blue. At the top, it says "Account Registration". Below that, it says "Please enter your account information." There are two text input fields: "Customer Account ID" and "Customer Name". At the bottom, there are two buttons: "OK" and "Cancel".

Figure 8. Account Registration screen

## Recommendation

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Medisoft Root data (which includes SharedData tables) and store it safely offsite. In this way, in case your server fails or you have to set up a new server, you can restore from that Root Data backup. Registration of Medisoft v27 is tied to the server, so if you do not have your Medisoft Root Data backed up, you will need to contact your VSE or Support to get your registration reactivated. Perform this one-time backup in addition to the daily practice files backup, which should be performed and stored offsite.

Under the new licensing model, the software may only be registered on one application or file server. Application or file server is defined as where Medidata is located and

Advantage Database Server is installed. If there are other Remote Desktop Servers in the organization, the client needs to be installed on the application or file server and the software registered to this server.

If the Medisoft database is established on additional servers in the same organization, an error message will appear informing you that the customer/account is already registered. The software will not be functional in this situation.

---

**IMPORTANT:** The Customer Account ID IS case-sensitive!

---

“Note: CGM MEDISOFT requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use CGM MEDISOFT for up to 30 days without your Internet connection. After this, you will receive a warning message that you have seven days to connect before you are locked out of CGM MEDISOFT.

---

### Account Registration Process Troubleshooting

If you have verified that you do not have a prior installation of Medisoft 27 on your server and have ensured that the IsRegistered check box is removed, but still receive the following error that the Salesforce account is already registered:



Figure 9. Error message

Then, check for a firewall or router that may be blocking some of the Platform Services APIs. The following must all be allowed:

identity.emdscloud.com	eligibilitybenefits.emdscloud.com
licensing.emdscloud.com	ppsmobile.emds.com
terminology.emdscloud.com	api.emdscloud.com

In addition, the two below are required if you are using CGM CONNECTION:

<https://cnx.cgmus.com/>

<https://cnx-mh.cgmus.com/>

## Passwords

Password requirements include:

- Required passwords for all users, including a single user. Currently, you can set up a CGM MEDISOFT practice with no password. In CGM MEDISOFT 27, however, a password is required for access to data for all versions of CGM MEDISOFT.
- A password must be at least 8 characters in length. It can contain numbers or alpha characters and IS now **case-sensitive**.

- If you try to save a password that doesn't meet the requirements, you will receive a warning.

## New practices

When you create a new practice, a system/administrator **user with** a password with access level of 1(all access) is automatically created for you. The user name for this password is SYSTEM and the password is MEDISOFT1 (all capital letters).

---

This new login has been added to the Tutorial database and will be added to any practice upon upgrade without any active users.

---

To create a new practice,

1. In CGM MEDISOFT, select File > New Practice. The Create a New Set of Data screen opens.
2. Enter the practice name and data path.
3. Click Create.



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