

9.0 Requirements and Recommendations

Our newest product, version 9.0, includes several product enhancements and additions for your office. Among those additions and changes are:

- Enhanced Medical Records (the most recent EHR module)
- Changes to the Word interface to accommodate new medical records design
- New and Updated Crystal Reports
- A new Screen Generator (now called Screen Builder) feature for customizing your screens
- A new Print Designer, to better customize the look of your “print screens”
- A brand new collections module (for offices with Line Item Posting) for detailed tracking of collections
- Updated login options which allow you to create user profiles for ease in modifying the login table
- Electronic Billing clients must be on version 9.0 for NPI Only Billing

Due to some of the upgrades and changes in this new version, there are some additional programs that will need to be installed on your systems along with the upgrade to allow your upgrade to proceed with as little interruption as possible and to allow your office to be able to utilize all of the new features.

- 1) CR11Setup.exe is required to be installed prior to the update on all computers using Compulink as you will not be able to launch the software until this file is installed. The support representative assisting you through the update process will assist you with instruction on downloading and installing this program
- 2) Adobe Reader will need to be installed on all computers that will utilize the print screen options within the software. The support representative assisting you through the update process will assist you with instruction on downloading and installing this program
- 3) If your office utilizes EHR (Medical Records) and prints Microsoft Word Documents that include Medical Records information, you will need at least one copy of Microsoft Word 2007 installed to be able to create or edit Documents using the new Medical Records. Word 2007 is only required for the user to be able to edit or create documents as the new documents can be printed from your existing version of Word.
- 4) If you are creating and running your own Crystal Reports, all reports will need to be upgraded to Crystal 11 version and integrated into our Advantage software report menu using our Crystal Menu Update option from Utility menu. The report parameters may also need to be updated to accommodate the changes to the database structure in this new version.

In order to help you succeed in being able to upgrade with as little transition interruption as possible we have created this mandatory class that will provide your office staff with education on the newest features and the opportunity to ask questions regarding the update:

- 1) 9.0 Overview

For offices who have the medical records module, or who will be implementing the medical records module, the following classes are also mandatory:

- 1) V9.0 Electronic Health Records (EHR) Overview I
- 2) V9.0 Electronic Health Records (EHR) Overview II
- 3) V9.0 Electronic Health Records (EHR) Tables

The following classes are strongly recommended if you are going to be making any screen changes for your office:

- 1) V9.0 Screen Builder I
- 2) V9.0 Screen Builder II
- 3) V9.0 Screen Builder III

In addition, the following 9.0 classes are also available:

- 1) Crystal Reports V9.0
- 2) V9.0 Collection Tracking
- 3) Introduction to Print Designer

Please sign and confirm that you have read and understood the above information. By signing you also confirm that your staff will take the required Webex classes **BEFORE** scheduling an appointment to update to Version 9.0

Signed

Date

Business Name

Account Number