eMDs

Practice Partner

Upgrade and Configuration Guide

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Product

Practice Partner, Release 11.2

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Revision history

Date	Page (s)	Description
08/19/2014	11	Updated the pre-installation task information for running CTGUI.EXE and CHECKALL.BAT.
05/24/2016	various	Changed references to McKesson to eMDs.
09/22/2016	10	Added pre-installation task to verify that the BulkDataLoad files are present in the ppart file.
07/24/2017	39, 161	Updated download steps in License Files and Downloading your Products from the Customer Support Website.
08/08/2017	4, 6, 61	Added two new access level settings for Updox and updated the Web View and Web View Audit Trail Report access level settings. Added a new Updox section describing the new **[Updox]** section in the PPart.ini file and the new **Updox Installed** check box on the Special Features screen - General tab.
01/04/2018	54	Added Windows Server 2016 Standard as a supported operating system for Group Policy Management Console.
05/04/2018	39, 41	Updated the steps in To download your license files: and To change the number of licensed users:.

Date	Page (s)	Description
05/15/2018	53	Clarified that Windows Home 10 is not a supported operating system for Group Policy Management Console.
01/17/2019	17	Added a new "Chapter 3 - Upgrading to eMDs Prescribe." Removed the following chapters and appendixes: • Using Active Directory to Install Practice Partner on Client Workstations • Configuration • Downloading your Products from the Customer Support Website • Troubleshooting Updated the Practice Partner add-on products and interfaces section in "Chapter 1 - Introduction."
02/21/2019	11, 12, 18	Added a new pre-installation task for sites that are running the eMDsELIXIR HQI Practice Connector service for FIGmd connectivity. Added a new pre-installation task to run the **CheckProviderSPIAndNPI.exe** utility. Added a new Prerequisite section for the upgrade to eMDs Prescribe.
02/22/2019	11, 15	Updated the pre-installation task for running CTGUI.EXE and CHECKALL.BAT. Updated the Client workstation upgrade section.
03/05/2019	22	Added a note to step 7 stating that the migration process will restart all PMSI services at this point.
03/07/2019	34	Added a note to step 19 about migrating pharmacies.
03/25/2019	36	Added a new Set the PrescriberManagementAdministrators= setting in the [Rx] section of the ppart.ini file section.
03/26/2019	37	Added a new Remove the PMSI.ePrescriptionConfiguration.exe utility section.
03/28/2019	16, 18, 32	Added a new Post-installation task section. Updated the prerequisite section for the eMDs Prescribe migration process. Added error message information to step 16 in the Transferring data to the eMDs Prescribe system section.

Date	Page (s)	Description
04/01/2019	12, 18	Updated the pre-installation task to run the **CheckProviderSPIAndNPI.exe** utility. Updated the prerequisite section for the eMDs Prescribe migration process.
04/22/2019	13	Added two tasks to the pre-installation tasks table.
05/09/2019	20	Updated the pre-installation checklist for upgrading to eMDs Prescribe.
05/28/2019	36	Clarified that the **PrescriberManagementAdministrators=** setting is in the [Rx] section of ppart.ini.
06/07/2019	12	Updated the Run the CheckProviderSPIAndNPI.exe utility pre-installation task.
06/12/2019	13	Added a new pre-installation task for c-tree sites only.
07/01/2019	3	Added a new Backup and restore process section to “Chapter 1 - Introduction.”
08/26/2019	3	Updated the Backup and restore process section in “Chapter 1 - Introduction.”
10/09/2019	various	Updated “Chapter 3 - Upgrading to eMDs Prescribe” for eMDs Prescribe.
01/06/2020	11	Added new SQL sites and Oracle sites entries in the Pre-installation tasks table.

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Chapter 1 - Introduction

The installation procedures in this guide are for existing sites upgrading from Practice Partnerr version 11.1 and above.

This guide takes you step-by-step through the process of installing Practice Partner on your server and workstations. Before you begin the installation, you should carefully read and understand all sections in this guide, including:

- Introduction – General overview.
- Installation – These sections include pre-installation tasks; procedures to install new network and client configurations; and post-installation tasks.
- Appendices – Important technical information.

This guide references "Practice Partner", a concept that implies that you are upgrading one of the following:

- Patient Records and/or Appointment Scheduler with Medical Billing (Total Practice Partner)
- Patient Records and Appointment Scheduler
- Patient Records for Windows
- Medical Billing for Windows

Because this guide covers the installation of the products listed above, make sure that you pay attention to the product-specific steps in this document. You only need to complete the steps that are applicable to the product you are installing. The product-specific steps or notes will be preceded with the bolded product name, for example, **Medical Billing Sites only**.

Product documentation

You can find the Practice Partner documentation referenced in this guide and the latest product documentation on the eMDs Support website.

Technical support

For technical assistance, please contact Practice Partner Technical Support at https://practicesupport.emds.com, or by calling the number appropriate to your type of organization. Follow the prompts and listed to all available choices as menu options may change.

- Independent Support: 1-855-IND-TEAM (463-8326)
- VAR Support: 1-855-VAR-TEAM (827-8326)
- Enterprise Support: 1-855-ENT-TEAM (368-8326)

In this chapter

This chapter contains the following topics.

Backup and restore process

Make a full cold backup of your Practice Partner application server. This backup should include everything you need to re-create your production environment. Do not continue the conversion until the backup is complete and verified.

You must have a System Restore backup and not just a ppart backup; if there is a need to have a system restore, this would be what you would need for a catastrophic restore.

If the patch process fails, contact Technical Support for help resolving the patch failure issue. If the Server Patch completes but there is a failure in the database conversion that cannot be resolved by Technical Support, then a complete system restore will be necessary. Run the **MigrateToEmdsRx.exe** utility rollback option so that you can e-prescribe on the old system and then perform a complete system restore. You can try the migration again at a later date.

Limiting user access to Practice Partner programs

Ensure that all users and report users are out of the system and all interfaces, backups, and scheduled tasks are disabled during the upgrade process.

Batch files to start and stop services

If your organization uses batch files to start and stop services (for example, PMSI Application Server) this could adversely affect your organization's ability to send and receive claims with the updated Electronic Claims functionality, as claims are now processed through services. eMDs recommends that you stop and start services manually.

Electronic Medical Records (EMR) sites

The following sections contain important information for sites installing Patient Records/ Appointment Scheduler and Total Practice Partner.

Order Entry

Some Order Entry items (such as the **Hide Orders?** access item) may appear in Patient Records, even if you have not purchased Order Entry licenses. These items are not functional without a license.

Prescription format files

Practice Partner provides an example prescription format file in HTML format (**Rx.cfg**). This file is specifically designed for use with the Practice Partner HTML Editor. You can modify this file to suit your needs or use it as is. See the *Printed Prescription Configuration Guide* for more information.

The example **Rx.cfg** file includes the date, the patient's name and address, the first 6 allergies on the patient's allergy list, the details of the prescription (including up to 6 lines of the extended sig and the note), the Provider name, the Provider DEA (if the prescription is a controlled substance), and the practice name, address, telephone number, and fax. It also includes two places for the Provider to sign the printed prescription, one labeled **Substitution Permitted** and one labeled **Dispense as Written**.

The example **Rx.cfg** file can be found in both the database directory (usually **p:\ppart**) and the **\ppeditor** directory (usually **p:\ppart\ppeditor**).

The **Rx.cfg** file only applies to printed and faxed prescriptions; it does apply to transmitted prescriptions (that is, prescriptions sent using the Practice Partner ePrescribing module).

Practice Partner add-on products and interfaces

If your site uses Practice Partner add-on products or interfaces, you must upgrade these products to version 11.2. Your current versions will no longer work after you install Practice Partner 11.2. Do not uninstall your current 11.1 add-on products or interfaces before starting the 11.2 upgrade process.

During the patch selection process in the Practice Partner patching utility, make sure that you select the appropriate interface and/or add-on patch(es) to upgrade them to 11.2. For more information about the patching utility, see the *Practice Partner 11.2 Release Notes* or the *Practice Partner Patch Download and Installation Process User's Guide*.

The following table lists the Practice Partner add-on products and interfaces.

Add-ons	Interfaces
Brentwood EKG module	BillingBridge
Brentwood Spirometry module	GE EKG
HIE	Immunization Registry
Practice Partner Patient Data Link (PDL)	LabCorp
Practice Partner Zoom	Paragon
	PerSe
	PP Connect
	QuestToro
	RelayHealth
	XFire

Custom interfaces

If your organization uses a custom interface(s) and you are upgrading to Practice Partner 11.2, contact Practice Partner Customer Support to schedule a time to upgrade your custom interface(s). Please allow at least 30 days advance lead time when scheduling this upgrade.

Upgrading to Practice Partner WebView 11.2

Email the eMDs WebView Setup team at least one week (or more) prior to upgrading to Practice Partner 11.2 to inform the team of your upcoming upgrade. After your organization upgrades to WebView 11.2, eMDs must complete the set up needed for WebView to function after the upgrade. Send the email to **webviewsetup@practicepartner.com** with the subject "WebView v11 Upgrade Request". Include the name of your organization and your WebView URL in the email.

Chapter 2 - Upgrading to Release 11.2

The installation and upgrade procedures in this section are for existing sites upgrading from Practice Partner 11.1.

This section takes you step-by-step through the process of installing Practice Partner on your server and workstations.

The upgrade process involves the following steps:

Step	Action
1	Complete applicable pre-installation tasks.
2	Install Practice Partner on your server.
3	Install Practice Partner on your client workstations.
4	Complete applicable post-installation tasks.

Do not rename or move the Practice Partner directory after the installation. This directory is used to register Practice Partner files, and the program may fail to work if the directory name is changed.

In this chapter

This chapter contains the following topics.

Pre-installation tasks

Before installation, complete the tasks in the following table.

Task	Description
Patient Records Tasks	
Respond to outstanding refill requests	Approve/deny all outstanding refill requests.
Medical Billing Tasks	
Run Close Day Reports	Run Close Day reports and change posting date.
Run the Analysis of Diagnoses report	Run the Analysis of Diagnoses report to identify the top 25-50 diagnosis codes from your practice. For more information, refer to the *Analysis of Diagnoses report* topic in the Medical Billing online help. If you are using a billing system other than Medical Billing, obtain a similar report from that system.
Bill Electronic Claims	Create and send the transmission file for all claims in the intermediate claim file. Mark all claims billed.
Insurance Billing “Re-Print Last Batch”	If you wish to rebill the last batch, rebill it prior to the conversion. This information is reset during the conversion. You may still rebill any claim billed prior to the conversion by entering a range of service dates.
Appointment Scheduler Tasks	
Optional - Back up your sample Appointment Scheduler Encounter forms	During the upgrade installation the sample Appointment Scheduler encounter forms (that is, AS_Encounter, AS_Label, OE_Custom, OE_Label, and Cancelled_Orders) will be overwritten. If you are using these forms you must copy your encounter forms before the installation to ensure that the forms are saved for future use.
Administrative Tasks (complete these tasks outside the application)	
Make sure all users are logged out of all Practice Partner applications	Make sure all users are logged out of all Practice Partner applications and will not log back in until after the upgrade is complete. For example, if you are running Dragon software for speech recognition, have all users exit Dragon.
Make a full cold backup of your Practice Partner application server	This backup should include everything you need to recreate your production environment. **Do not continue the conversion until the backup is complete and verified.**

Task	**Description**
Restart your server before beginning the installation	Practice Partner must be installed directly on the server that houses the database. eMDs recommends that you restart your server before beginning the installation.
Sites running the PMSI Monitor Service only – Stop the service before upgrading	If your site is running the PMSI Monitor Service (to monitor the application and data service on your application server) stop this service before upgrading to 11.2. Once the upgrade is complete you must restart the PMSI Monitor Service. You can check whether your site is using the PMSI Monitor Service by seeing if the service is present in the Windows Services manager (Select Start > **Run**. Type **Services.msc** and click **OK**. Scroll through the list to find the service). **To stop and restart the PMSI Monitor Service:** 1. Select Start > **Run**. Type **Services.msc** and click **OK**. The Windows Services manager appears. 2. Right-click on **PMSI Monitor Service** and select **Stop**. Windows will stop the PMSI Monitor Service. 3. Close the Windows Services manager, and start the 11.2 upgrade. 4. After you have completed the 11.2 upgrade, open the Windows Services manager (Select Start > **Run**. Type **Services.msc** and click **OK**.) 5. Right-click on **PMSI Monitor Service** and select **Start**. Windows will start the PMSI Monitor Service and the status will change to **Started**.
Sites running the eMDsELIXIR HQI Practice Connector service for FIGmd connectivity only - Stop the service before upgrading	If your site is partnered with FIGmd for reporting and running the eMDsELIXIR HQI Practice Connector service, stop this service before upgrading to 11.2. When the upgrade is complete, you must restart the eMDsELIXIR HQI Practice Connector service.
c-tree Server and c-tree Plus sites only - Run **CTGUI.EXE** or **CHECKALL.BAT**	Run **CTGUI.EXE** or **CHECKALL.BAT** before upgrading to Practice Partner 11.2. If errors are detected, you must repair the files before upgrading. For more information, see the CTGUI section in the *Practice Partner Utilities Guide*.
SQL sites	Prior to upgrade, perform a database check (dbcc checkDB) for the database your medical software is named (for example, PROD). PPMT should be installed and working, and check for errors daily.
Oracle sites	Use PPMT and check the results for errors.

Task	Description
Add URLs to your trusted sites	Ensure that the following URLs are added to your trusted sites: • **https://microservice.emds.com/** • **https://erx.emdscloud.com**
Execute **fixppsq.exe ALL** command	Open a command prompt and change the path to your **ppart** folder, which usually is in the **P:** drive. Execute the command **fixppsq.exe ALL**, which is to fix the unique sequence values. If you do not run this step, you may encounter an **Unable to add prescription** error when prescribing a medication.
Run the **CheckProviderSPIAndNPI.exe** utility	Before you run the CheckProviderSPIAndNPI.exe utility, back up the following three files in the **ppart** folder: • PMSI.Networking.Services.InteroperabilityService.exe.config • ServersTemplate.config • Server.config eMDs recommends that a few days before you plan to perform the migration to eMDs Prescribe, that you run the **CheckProviderSPIAndNPI.exe** utility located in the ppart folder. If the utility is missing from the ppart folder, make sure you have installed all of the latest patches, and if it still is not present in the folder, contact Technical Support. This utility is included in the 03/29/2019 patch. The **CheckProviderSPIandNPI.exe** utility performs a check to verify that an SPI associated with a provider is associated with only one practice, that all providers who have an SPI also have an NPI, and that practices do not have duplicate addresses. The utility generates a report called the Migration Readiness Assessment. If any of the checks fails, you will see a list of warning messages indicating the provider(s) or practice(s) you need to fix before you start the migration. If the report finds no issues in any of the checks, it will report the prescriber and demographics that will be migrated to eMDs Prescribe. Please check this data for accuracy in order to avoid issues when transferring data to the eMDs Prescribe system For an example of the Migration Readiness Assessment, see the Prerequisite in the eMDs Prescribe migration process section.

Task	Description
Check the <Client> section of the servers.config.	Check the <Client> section of the servers.config for the following endpoint. Be sure to substitute the name of your server for <NameOfServerHERE>. **<endpoint name=”InteropSvcEpcsProxy”** **address=”net.tcp://<NameOfServerHERE>:50508/InteroperabilityService/EPCSProxy/net.tcp”** **binding="netTcpBinding"** **contract="eMDs.EPCS.IEPCSProxy"** **bindingConfiguration="TCPWindowsSecurity"** **behaviorConfiguration="ClientConfigBehavior"** **/>** If this endpoint is missing after backing up the file, add the section.
Check the <client> section in the PMSI.interoperability.Service config.	Check the <client> section in the PMSI.interoperability.Service config for the following section: **<endpoint address=”** **binding=”basicHttpBinding” bindingConfiguration=”EPCSServiceBinding”** **contract=”eMDs.EPCS.IEPCSService” name=”CHServer_EPCSService”/>** If this section is missing after backing up the file, add the section.
c-tree sites only: Check for files in ppart folder	Ensure that the following files exist in the ppart folder: • mrrxwl99.dat • mrrxwl99.idx • mrrxtx99.dat • mrrxtx99.idx • mrrxrh99.dat • mrrxrh99.idx If any of these files are missing, contact Support for assistance.

NOTE: Do not upgrade to release 11.2 if you currently are in the process of identity proofing and/or registering with DrFirst for electronic prescribing of non-controlled substances or ECPS. You may upgrade to release 11.2 after you have completed the identity proofing and/or DrFirst registration processes.

Application Server and client installation

If your site uses only Appointment Scheduler and/or Medical Billing, refer to the following two sections in the *Practice Partner 11.2 Release Notes*:

- New patching system utility
- Increased character limits for names

Sites that use Patient Records must complete the steps in this guide to upgrade their patching system to 11.2 and to upgrade to eMDs Prescribe. **DO NOT** follow the steps in the ‘New patching system utility’ section in the *Practice Partner 11.2 Release Notes*.

During the patch selection process in the Practice Partner patching utility, make sure that you select the appropriate interface and/or add-on patch(es) to upgrade them to 11.2. For more information about the patching utility, see the *Practice Partner 11.2 Release Notes* or the *Practice Partner Patch Download and Installation Process User’s Guide*.

Client workstation upgrade

After you have installed the patches on your Application Server, go to each of your client machines and run Patient Records or Medical Billing to update your client installation to 11.2.

If you use a shortcut to run the client, after patching, use the installed shortcut in Start > Programs > McKesson > Practice Partner > **Patient Records**. If you have Medical Billing, use the installed shortcut in Start > Programs > McKesson > Practice Partner > **Medical Billing**. Ensure that you run the shortcut that contains the “updater” argument.

Post-installation task

Install PPMT (see chapter 7 of the *Practice Partner Utilities Guide*) and then:

For Oracle:

Run:

Exec pp_mt.pp_tamperpt('<production upd schema name>');

For example, Exec pp_mt.pp_tamperpt('PP_PROD_UPD');, where PP_PROD_UPD is the production database schema name.

For SQL:

Run:

exec SP_PPMT_TAMPERPT.sql

This will place protections on the PPAUDT, PPTRAL, and PPPADT database tables. Any attempts to update or delete information in these tables are logged to the TAMPERPT database table.

Chapter 3 - Upgrading to eMDs Prescribe

This section lists the steps you must complete to upgrade to eMDs Prescribe for Practice Partner Release 11.2.

Important note for Appointment Scheduler and/or Medical Billing-only sites

If your site uses only Appointment Scheduler and/or Medical Billing, refer to the following two sections in the *Practice Partner 11.2 Release Notes*:

- New patching system utility
- Increased character limits for names

In this chapter

This chapter contains the following topics.

eMDs Prescribe migration process

Prerequisite

eMDs recommends that a few days before you plan to perform the migration to eMDs Prescribe, that you run the **CheckProviderSPIAndNPI.exe** utility located in the ppart folder. If the utility is missing from the ppart folder, make sure you have installed all of the latest patches, and if it still is not present in the folder, contact Technical Support. This utility is included in the 03/29/2019 patch.

The **CheckProviderSPIandNPI.exe** utility performs a check to verify that an SPI associated with a provider is associated with only one practice, that all providers who have an SPI also have an NPI, and that practices do not have duplicate addresses. The utility generates a report called the Migration Readiness Assessment. If any of the checks fails, you will see a list of warning messages indicating the provider(s) or practice(s) you need to fix before you start the migration.

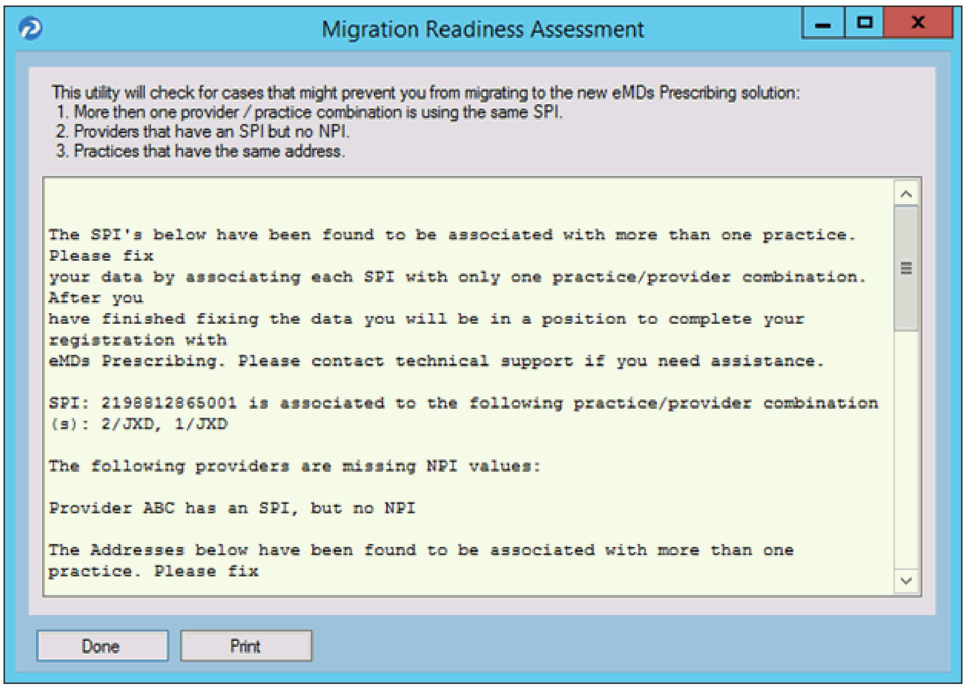

Figure 1. Migration Readiness Assessment - errors

If the report finds no issues in any of the checks, it will report the prescriber and demographics that will be migrated to eMDs Prescribe. Please check this data for accuracy in order to avoid issues when transferring data to the eMDs Prescribe system.

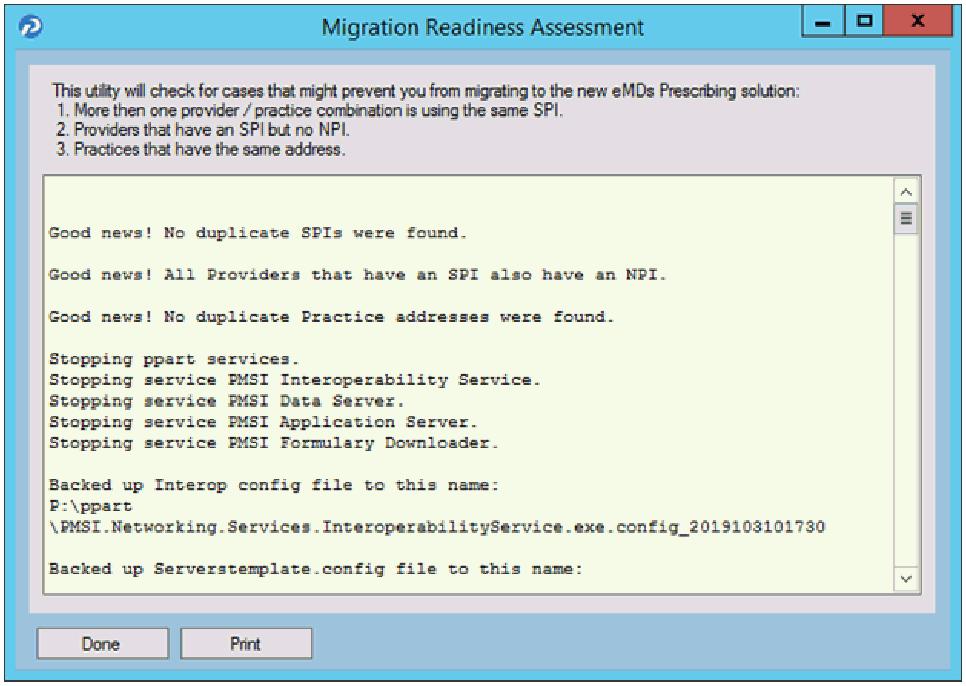

Figure 2. Migration Readiness Assessment - no errors

NOTE: If a provider requires a new SPI, you can use the Prescriber Management screen to register for a new SPI after you migrate to eMDs Prescribe. For more information, see the *Electronic Prescribing Registration Process and Setup Guide* and the **Prescriber Management screen** help topic.

To upgrade to eMDs Prescribe for Practice Partner Release 11.2:

Complete the following steps to upgrade to eMDs Prescribe for Practice Partner Release 11.2.

1. Log onto the Practice Support website to download the **MigrateToEmdsRx.exe** utility to your **PPart** folder.

2. Complete each item on the following checklist:

Check off when complete	Task
__________	Approve or deny all refill requests for all providers.
__________	Back up your Practice Partner database and **PPart** folders.
__________	The process to migrate could take a significant amount of time, depending on the size of your database. Both internal and beta testing have shown that upgrade completion times can exceed 10 hours, during which system access should not be allowed. eMDs recommends that you plan accordingly and allow for ample time for the process to complete.

Check off when complete	Task
__________	Understand that once the MigrateToEmdsRx.exe utility is run successfully, you CANNOT revert to the previous version of prescription functionality, as your Clearinghouse ePrescribing account will be disabled. However, if the MigrateToEmdsRx.exe utility fails to complete, you will be able to roll back to the previous version of prescription functionality with the assistance of Technical Support.
__________	Ensure that you are up to date on all patches.
__________	Ensure that the following URLs are added to your trusted sites: **https://microservice.emds.com/** **https://erx.emdscloud.com**

3. Double-click **MigrateToEmdsRx.exe** in the ppart folder. The Migration Setup screen appears.

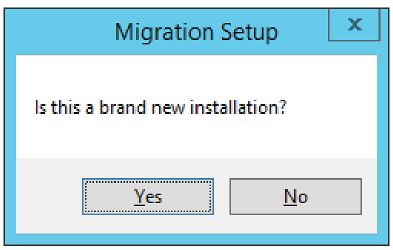

Figure 3. Migration Setup screen

If you currently do not have ePrescribing installed and this is a new installation, click the **Yes** button. The Launch the Software Update screen appears. Skip to step 6 below.

If you already have ePrescribing installed and are upgrading your current installation, or if you are attempting to roll back a failed migration, click the **No** button.

4. The Migrate to eMDs Prescribing screen appears.

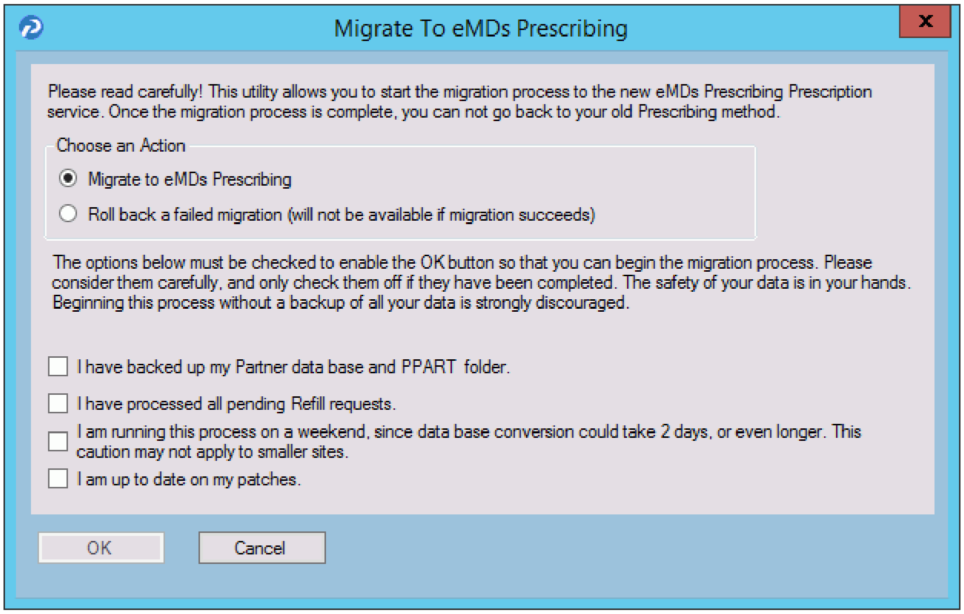

Figure 4. Migrate to eMDs Prescribing screen

5. Select the **Migrate to eMDs Prescribing** option, select all check boxes at the bottom of the screen, and click the **OK** button.

If the utility...	Then...
completes successfully	the Launch the Software Update screen appears.
fails to complete	return to the Migrate to eMDs Prescribing screen, select the **Roll back a failed migration** option, and click the **OK** button so that you can continue to use electronic prescribing. When you are ready to run the migration again, start at step 2.

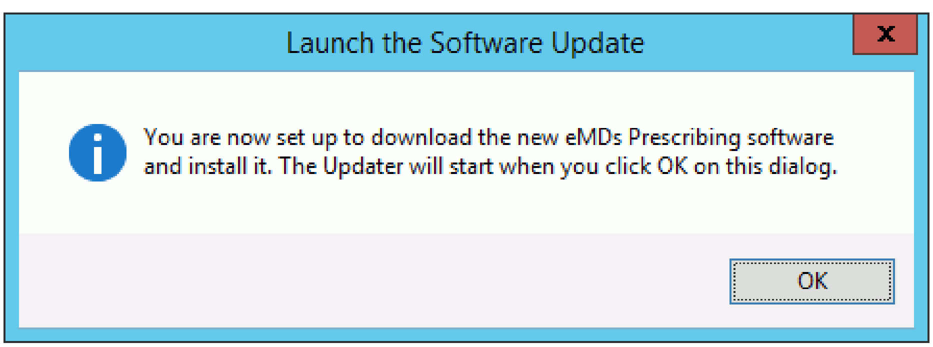

Figure 5. Launch the Software Update screen

6. Click the **OK** button. The Product Update Manager screen appears.

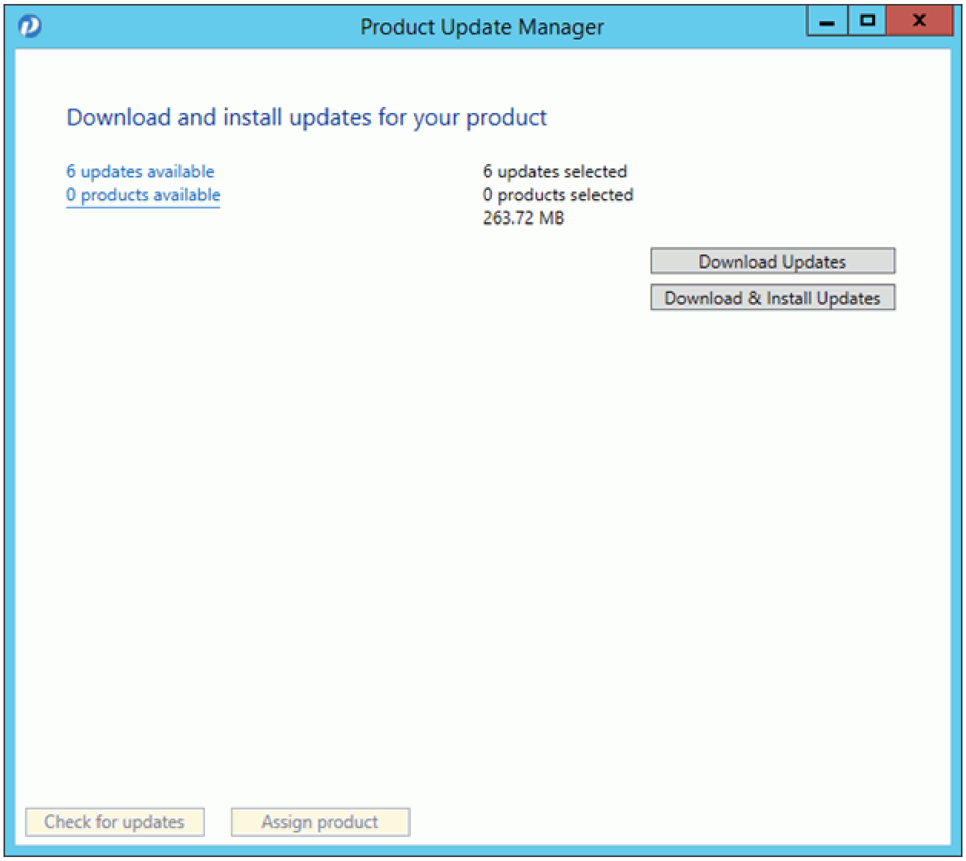

Figure 6. Product Update Manager screen

7. Select all patches and download and install them. A warning message appears.

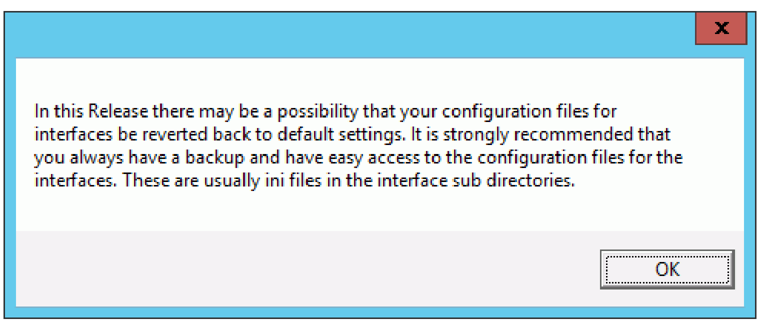

Figure 7. Warning message

8. Click the **OK** button. The Product Update Manager screen appears.

9. Ensure that all users are out of the system and then click the **Continue** button.

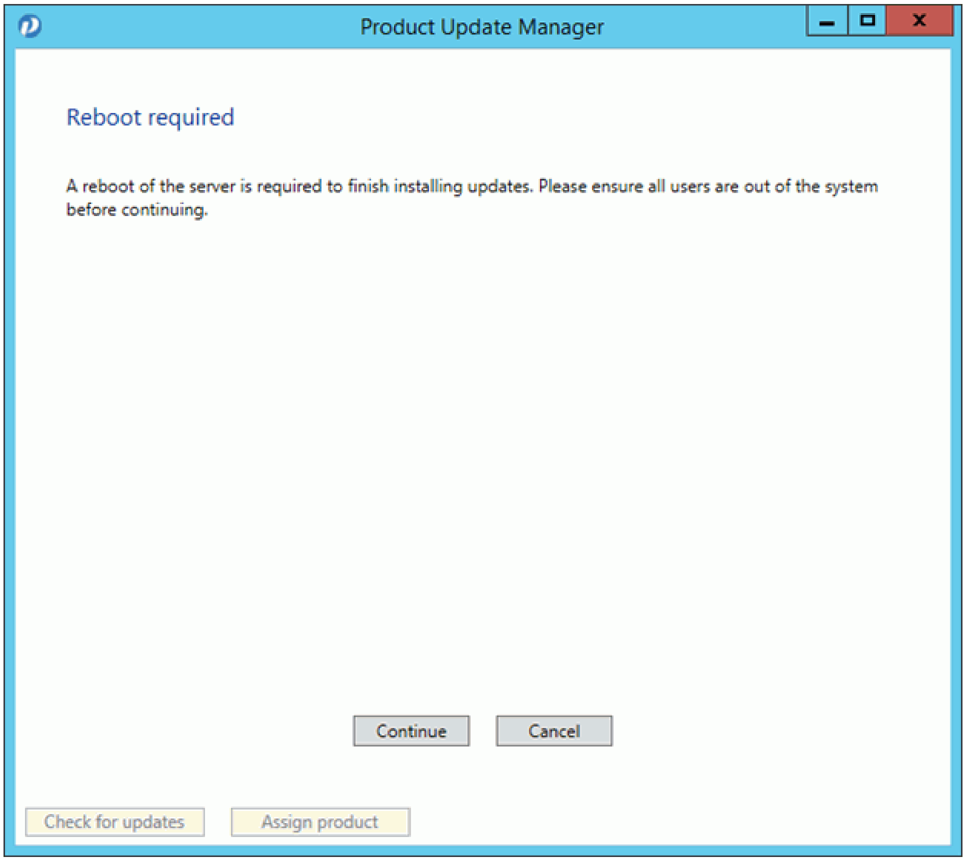

Figure 8. Product Update Manager screen

10. Open a command prompt and change the path to your **ppart** folder, which usually is in the **P:** drive. Execute the command **fixppsq.exe ALL**, which is to fix the unique sequence values. If you do not run this step, you may encounter an **Unable to add prescription** error when prescribing a medication.

    NOTE: If the patch process fails, contact Technical Support for help resolving the patch failure issue. If the Server Patch completes but there is a failure in the database conversion that cannot be resolved by Technical Support, then a complete system restore will be necessary. Run the **MigrateToEmdsRx.exe** utility rollback option so that you can e-prescribe on the old system and then perform a complete system restore. You can try the migration again at a later date.

    Verify that the migration process started all PMSI services. If it did not, attempt to restart the PMSI services yourself. If you are unable to get all PMSI services started, contact Technical Support.

11. Access Patient Records to activate with eMDs Prescribe.

a. Select Maintenance > Set Up > **External Systems**. The External Systems screen appears.

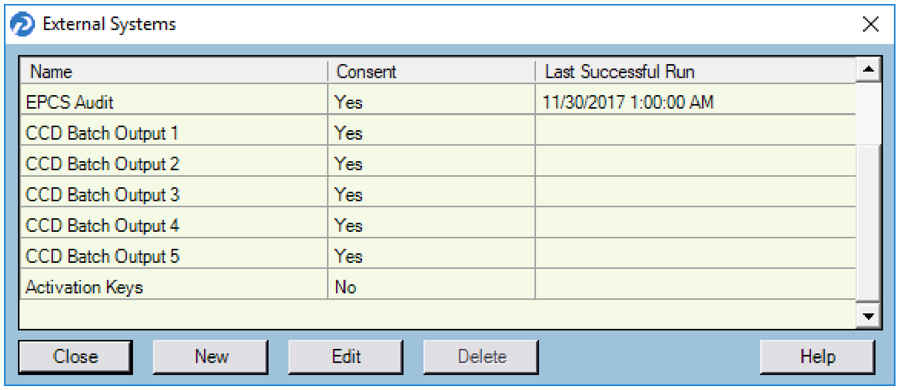

Figure 9. External Systems screen

b. Select the **Activation Keys** row and click the **Edit** button. The Activation Configuration screen appears.

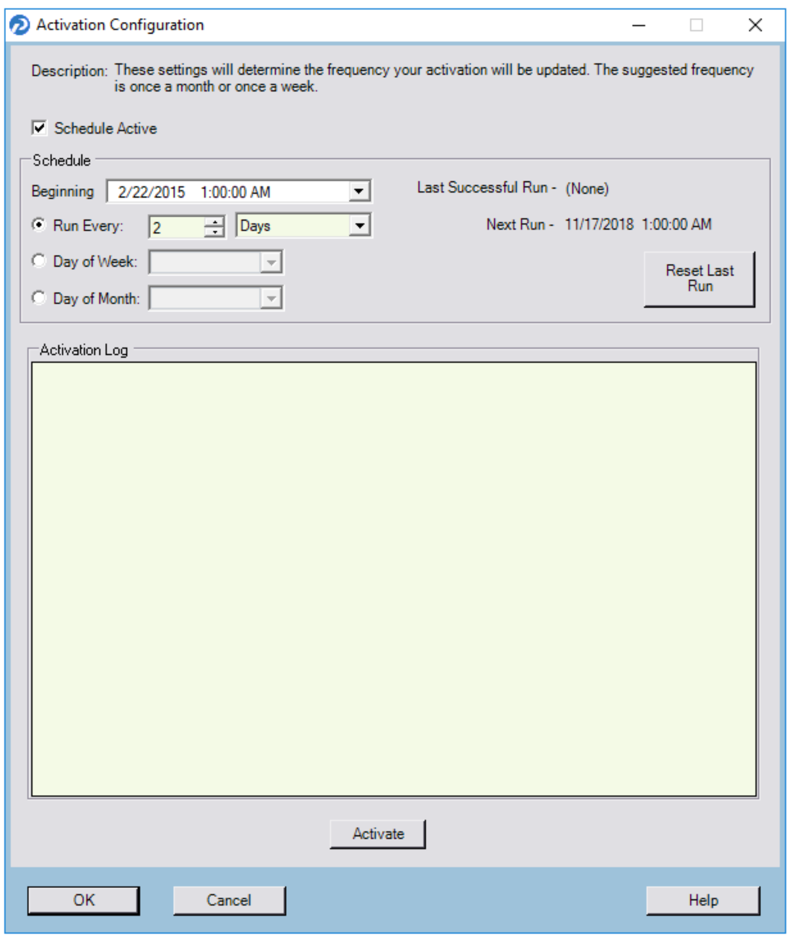

Figure 10. Activation Configuration screen

   c. Leave all fields in the **Schedule** area set to their default values and click the **Activate** button.

   d. When activation is complete, information will display in the **Activation Log** area. If activation did not complete, contact Support.

12. Complete the steps in the next section, Transferring data to the eMDs Prescribe system, to run the **RegisterWithEmdsRx.exe** utility. This utility will download your prescriber demographic data.

Transferring data to the eMDs Prescribe system

Complete the following steps to transfer your existing data to the new eMDs Prescribe system.

1. In the ppart folder, double-click **RegisterWithEmdsRx.exe**. The Register Customer screen appears.

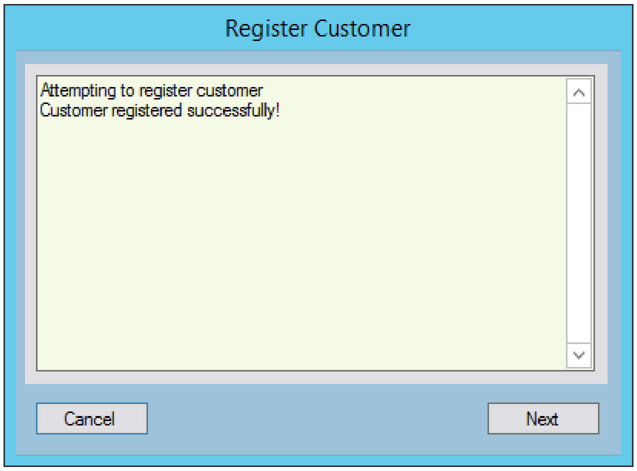

Figure 11. Register Customer screen

2. Click the **Next** button. The Register With EMDs Rx screen appears.

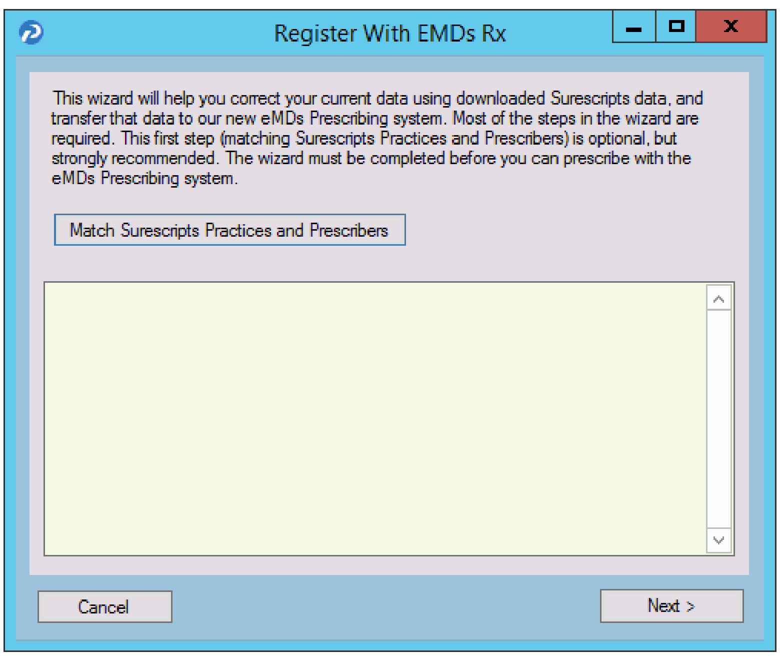

Figure 12. Register With EMDs Rx screen

eMDs strongly recommends that you match Surescripts practices and providers so that you can reconcile any differences you have between your data and the data contained in Surescripts. If you choose not to do so, skip to step 14.

To match Surescripts practices and providers:

3. Click the **Match Surescripts Practices and Prescribers** button. The Surescripts Practices screen appears. This screen displays all Practice Partner practices that have data that differs from the data recorded in Surescripts. If no practices are found that require reconciliation, the Surescripts Practices screen will not appear and you can skip to step 8.

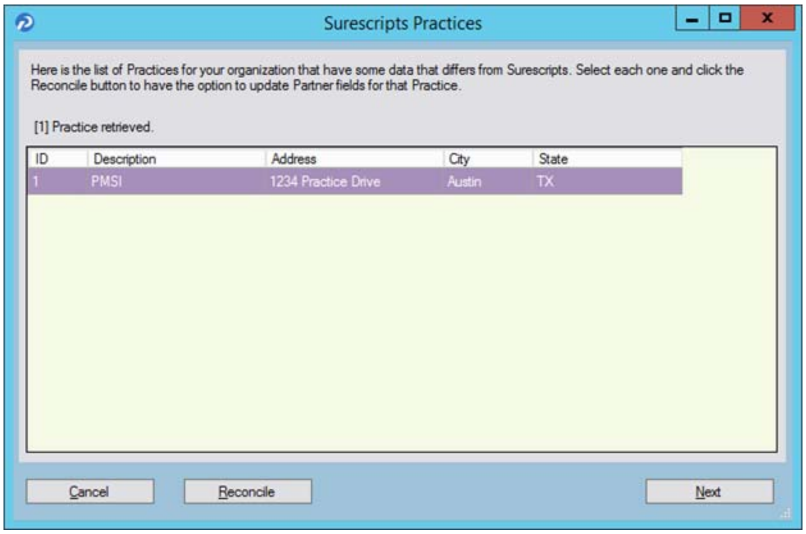

Figure 13. Surescripts Practices screen

4. Highlight a practice and click the **Reconcile** button. The Practice Reconciliation screen appears.

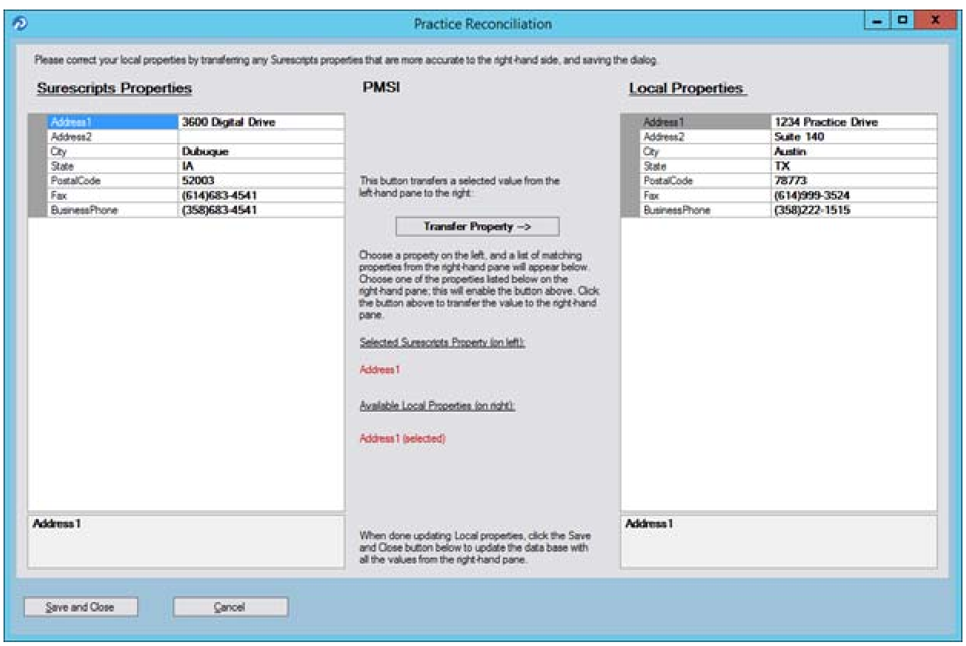

Figure 14. Practice Reconciliation screen

The following table describes the grids/fields on this screen.

Grid/field	Description
Surescripts Properties	This grid displays the demographic data associated with the practice in Surescripts.
Local Properties	This grid displays the demographic data of the practice in Practice Partner.
Selected Surescripts Property	This field displays the value that currently is selected in the **Surescripts Properties** grid.
Available Local Properties	This field displays each **Local Properties** value that is available to transfer the Surescripts data to replace in Practice Partner.

5. Select a value in the **Surescripts Properties** grid and an available field in the **Local Properties** grid and click the **Transfer Property** button to copy the Surescripts value to the Local Properties.

NOTE: If the selected **Local Properties** value is not one of the 'available local properties' for the selected Surescripts property, nothing will happen when you click the **Transfer Property** button.

You also can update the **Local Properties** fields manually by clicking in the field and typing a value.

6. When you are finished reconciling the practice data, click the **Save and Close** button to save the updates and return to the Surescripts Practices screen.
7. Repeat steps 4-6 for each practice that needs reconciling.
8. When you are finished reconciling all practice data, click the **Save and Close** button on the Surescripts Practices screen. The Surescripts Prescribers screen appears. This screen displays all Practice Partner providers whose data differs from the data recorded in

Surescripts. If no providers are found who require reconciliation, then this screen will not display and you can skip to step 14.

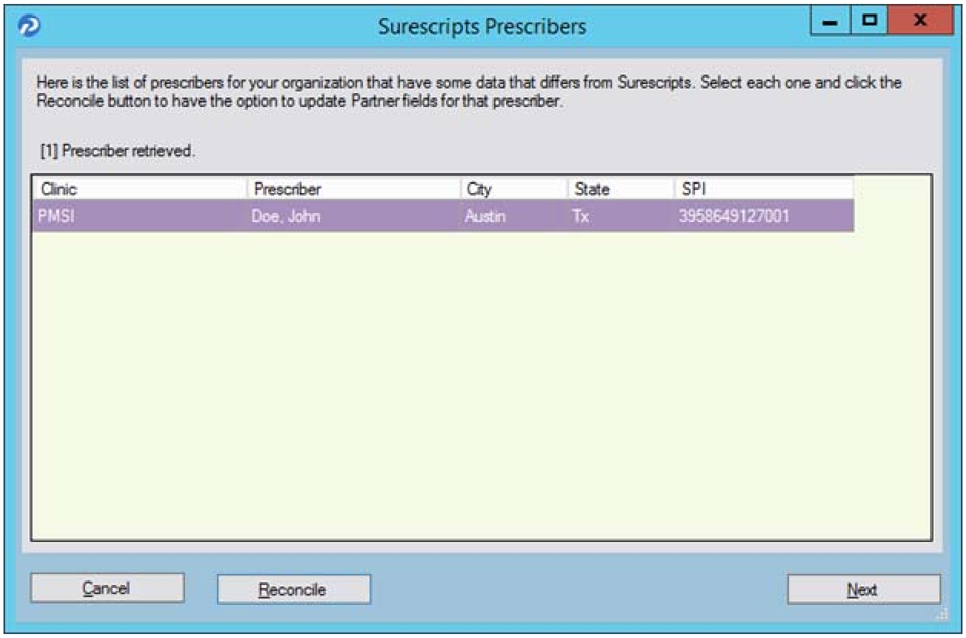

Figure 15. Surescripts Prescribers screen

9. Highlight a prescriber and click the **Reconcile** button. The Prescriber Reconciliation screen appears.

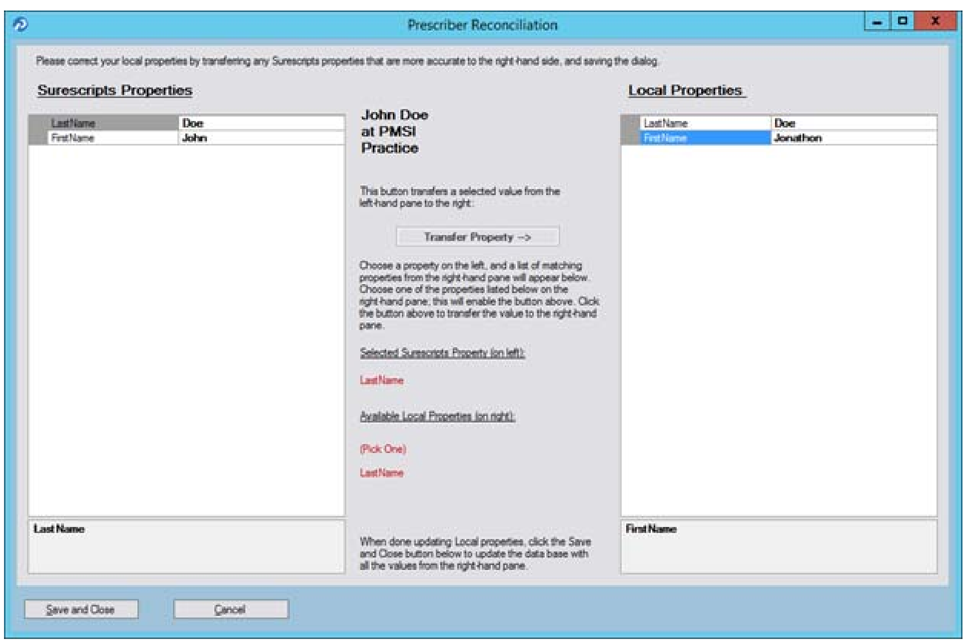

Figure 16. Prescriber Reconciliation screen

The following table describes the grids/fields on this screen.

Grid/field	Description
Surescripts Properties	This grid displays the demographic data associated with the prescriber in Surescripts.
Local Properties	This grid displays the demographic data of the provider in Practice Partner.
Selected Surescripts Property	This field displays the value that currently is selected in the **Surescripts Properties** grid.
Available Local Properties	This field displays each **Local Properties** field that is available to transfer the Surescripts data to replace in Practice Partner.

10. Highlight a value in the **Surescripts Properties** grid and an available field in the **Local Properties** grid and click the **Transfer Property** button to copy the Surecripts value to the Local Properties.

    NOTE: If the selected **Local Properties** value is not one of the ‘available local properties’ for the selected Surescripts Property, nothing will happen when you click the **Transfer Property** button.

    You also can update the **Local Properties** fields manually by clicking in the field and typing a value.

11. When you are finished reconciling the prescriber data, click the **Save and Close** button to save the updates and return to the Surescripts Prescribers screen.
12. Repeat steps 9-11 for each prescriber who needs reconciling.

13. When you are finished reconciling all prescriber data, click the **Save and Close** button on the Surescript Prescribers screen. The Register With EMDs Rx screen appears again.

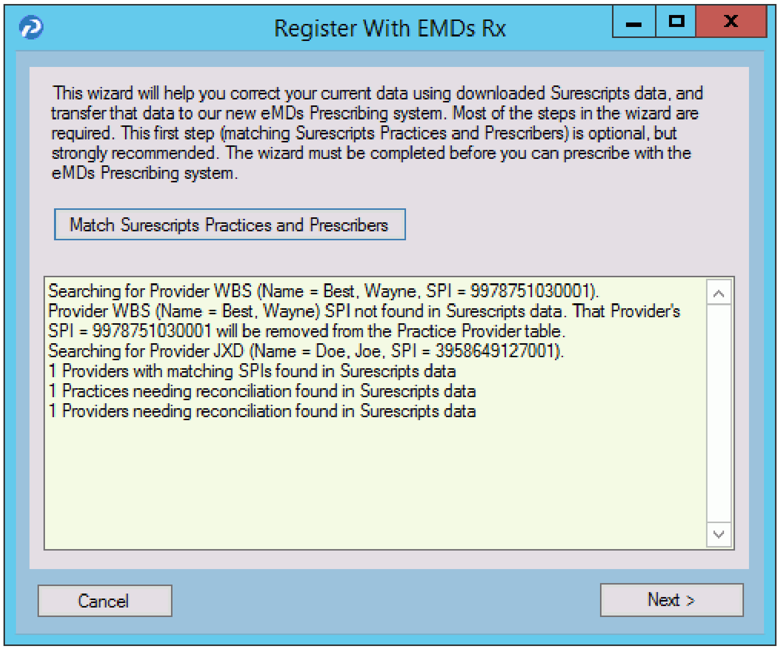

Figure 17. Register With EMDs Rx screen

NOTE: Any issues with the data reconciliation must be resolved before continuing with the next step.

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14. Click the **Next** button. Your customer and practices will be registered with eMDs Prescribe. The Register Organizations for EMDs Rx screen appears with the results of the registration process.

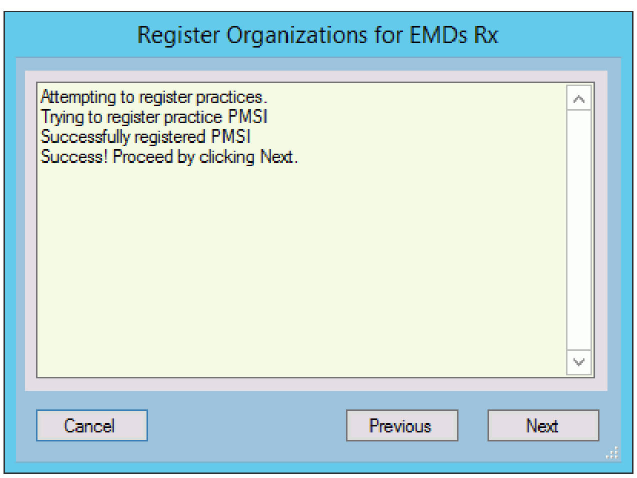

Figure 18. Register Organizations for EMDs Rx screen

15. Click the **Next** button. The Prescriber Migration screen appears and displays the total number of providers who you have affiliated with practices at your customer and the number of providers who need to be migrated to eMDs Prescribe.

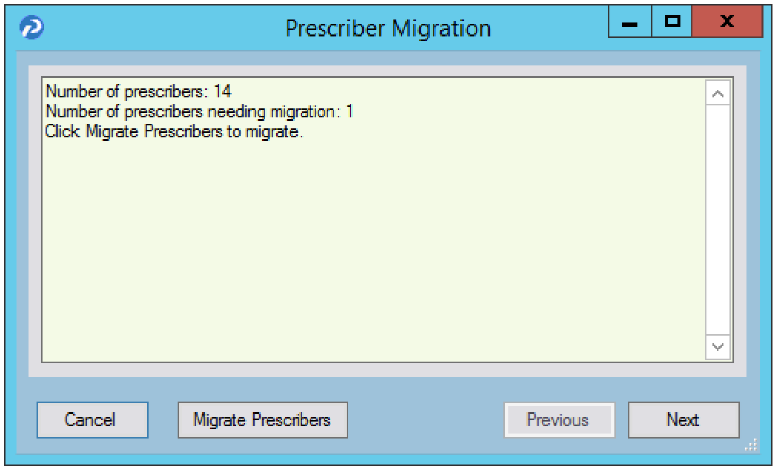

Figure 19. Prescriber Migration screen

16. Click the **Migrate Prescribers** button to migrate the prescribers to eMDs Prescribe. The results of the migration display on the Prescriber Migration screen.

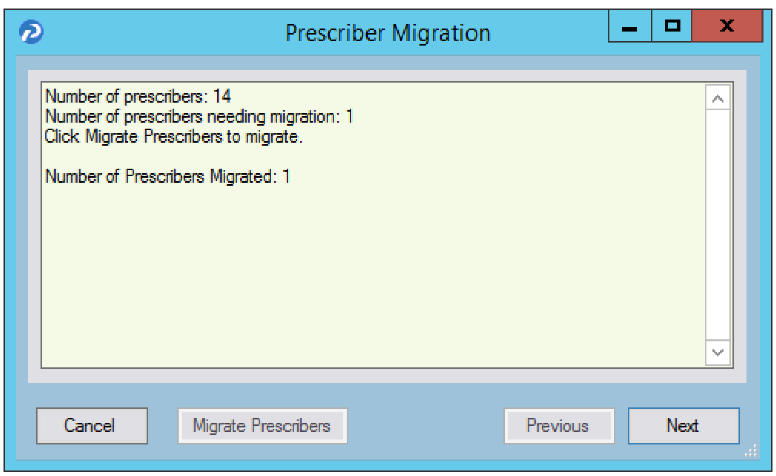

Figure 20. Prescriber Migration screen

If you encounter an error that states ‘Change/Refill service already assigned to spi: ####’, note the SPI number listed in the error message. This error is caused by a conflict of address information in Surescripts for the prescriber. Close and restart the utility and click the **Next** button to return to the Prescriber Migration screen and finish migrating your prescribers. This prescriber will be registered in eMDs Prescribe and will be allowed to prescribe; however, the prescriber still will have conflicting address information in Surescripts. Contact Technical

Services the day after the migration completes with the SPI number to get the conflicting address data corrected.

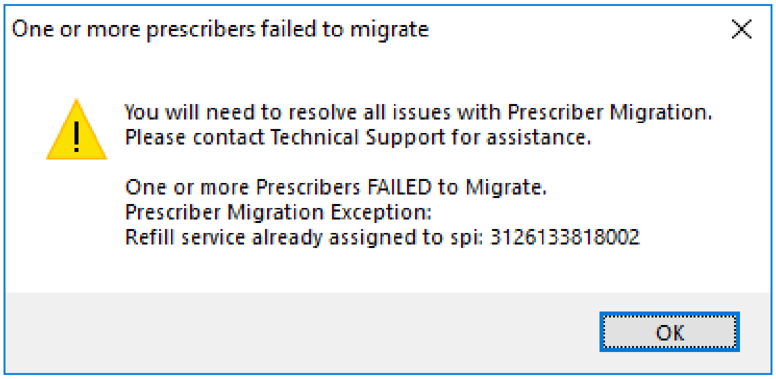

Figure 21. 'One or more prescribers failed to migrate' error message - with SPI number

If you encounter any other error, review the cause of the error and then close the utility. Log into Practice Partner and resolve the issue. Once the issue is resolved, you can restart the utility and click the **Next** button to return to the Prescriber Migration screen, where you can finish migrating your prescribers. Contact Technical Services if you need assistance.

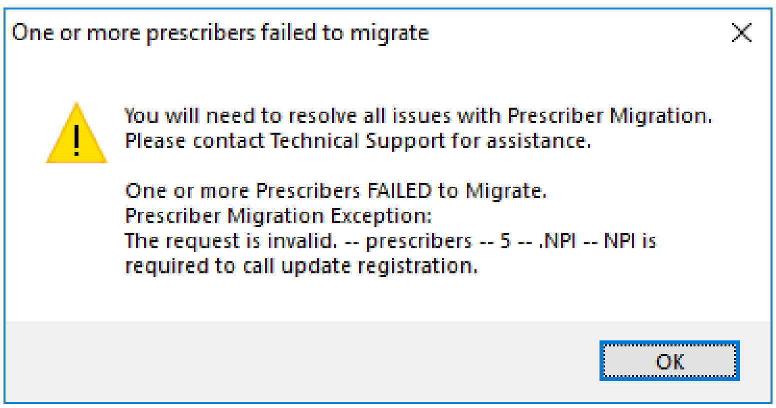

Figure 22. 'One or more prescribers failed to migrate' error message

17. Click the **Next** button. The Upgrade Customer screen appears.

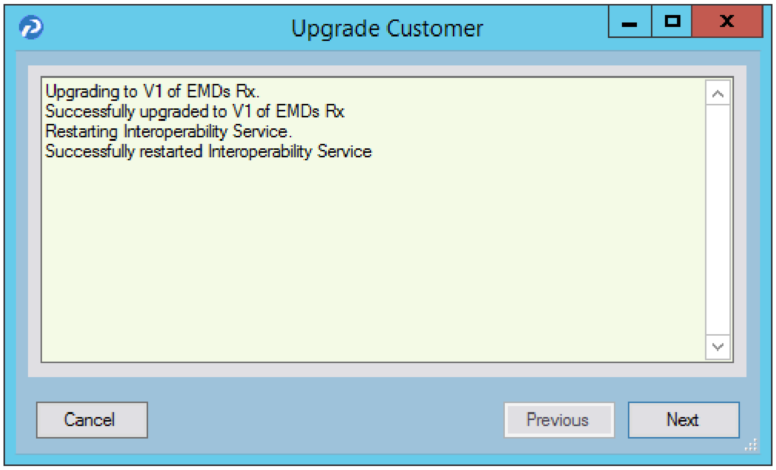

Figure 23. Upgrade Customer screen

18. Click the **Next** button. The Pharmacy Migration screen appears and displays the number of custom pharmacies associated with patients in Practice Partner.

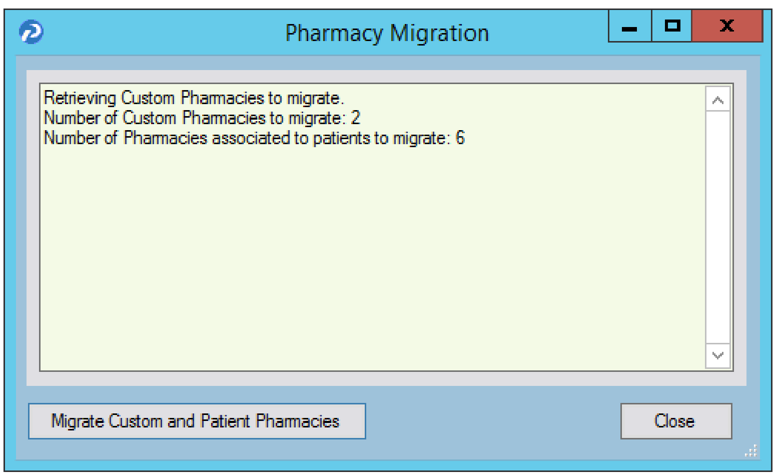

Figure 24. Pharmacy Migration screen

19. Click the **Migrate Custom and Patient Pharmacies** button to migrate the custom and patient pharmacies to eMDs Prescribe. The results of the migration display on the Pharmacy Migration screen.

NOTE: This migration process can take several hours to complete, but your normal work activities can continue during this time.

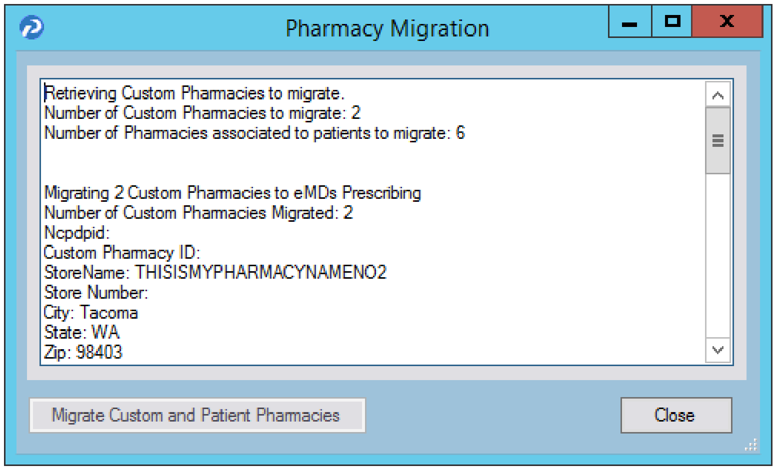

Figure 25. Pharmacy Migration screen

20. Click the **Close** button. The Migration Activity Report appears.

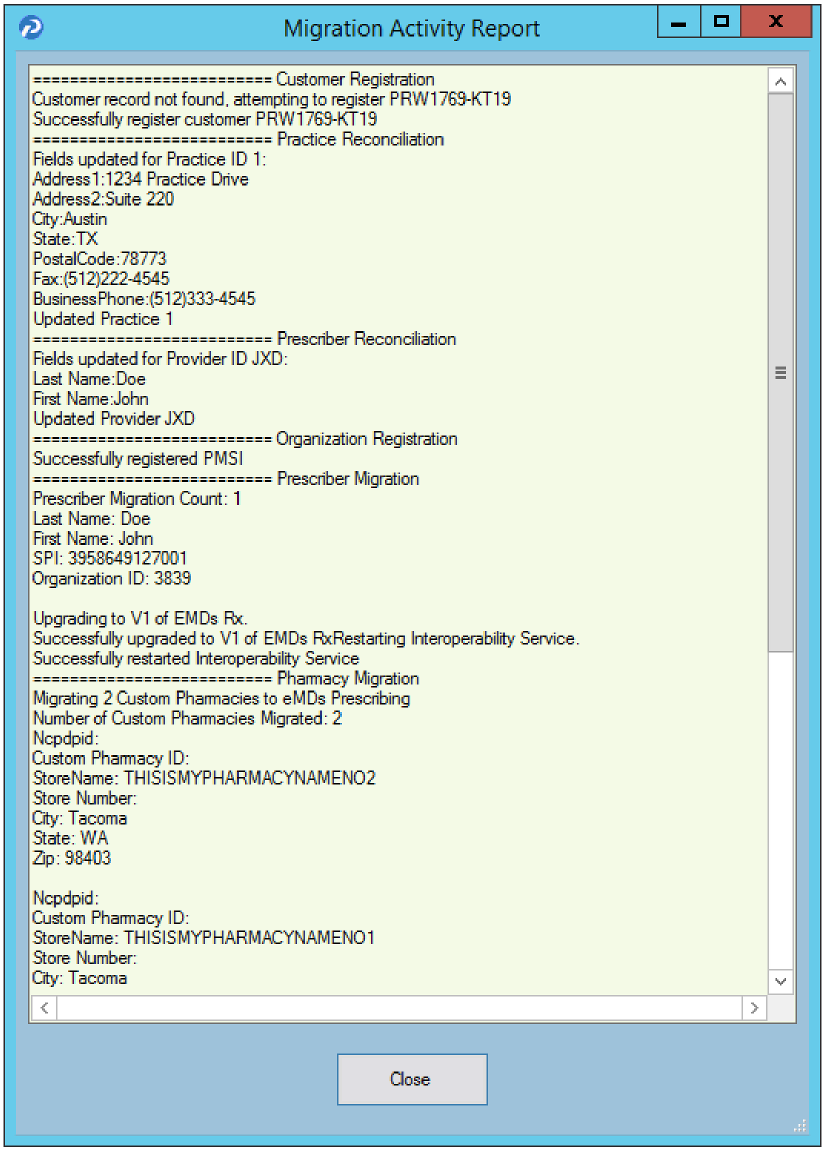

Figure 26. Migration Activity Report

21. Click the **Close** button to close the wizard.

NOTE: If you encounter any issues during the registration process, review the **RegisterWithEmdsRx.log** file in the ppart folder.

Set the PrescriberManagementAdministrators= setting in the [Rx] section of the ppart.ini file

The **PrescriberManagementAdministrators=** setting in the [Rx] section of the ppart.ini file controls which users receive the EPCS Audit report. The default setting is **PrescriberManagementAdministrators=UsePrescriberManagement**, which will send the EPCS Audit report to all users who have the Prescriber Management access level enabled.

To send the report to only certain users, specify those users' operator names in the setting in the case in which the operator names exist in the system (this setting is case sensitive). For example, **PrescriberManagementAdministrators=ACOBB, JSMITH, BBALL**. In this case, the EPCS Audit report will be sent only to users ACOBB, JSMITH, and BBALL.

The list of checks that this setting makes is as follows. Steps 3 and 4 are reached only if no operators have the Prescriber Management access level set.

1. List of operators in Override setting
2. Operators with Prescriber Management access level
3. Admin operator in Surescripts_Rcv.ini
4. OPID=1

Remove the PMSI.ePrescriptionConfiguration.exe utility

With release 11.2, the PMSI.ePrescriptionConfiguration.exe utility no longer is used. eMDs recommends removing this utility to avoid potential confusion.

Appendix A - License Files

You will no longer routinely receive a License disk. Instead, please download the product license from the eMDs Practice Support website. New license files are required for each new version of Practice Partner.

To download your license files:

1. Go to the eMDs Practice Support website at https://practicesupport.emds.com.
2. Enter your eMDs Practice Support website username and password.
3. Click the **Login** button.
4. Under **Quick Links** on the left side of the eMDs Practice Support website, click the **Downloads & License Files** link.

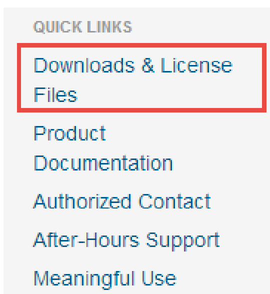

Figure 27. eMDs Practice Support website - Quick Links

The Product Downloads and License Files page appears.


Product Downloads and License Files

Below is a table containing the registered products and interfaces for **Practice Partner**.

Product	Current Version	Licenses	Serial Number	
ASWIN3	11.0	15	ASW1669-7178	Download Current Version
ClinicalTools	1105-17	5		Download Current Version
CodeWizard-MB	1109-15	2		Download Current Version
CodeWizard-PR	1109-15	3		Download Current Version
CPT-ICD9	1105-17	1		Download Current Version
CTreeServer	7.12.086c	32	88018423 HIWHO.ISPWL.PLNOI-SNWHO.XHIIG.OKSNW	Download Current Version

Figure 28. Product Downloads and License Files page

5. To download the current (11.0) license file, click the drop-down arrow on the **Download Product** button and select **Version 11.0** from the menu. The file is downloaded to your default download location.

To download the previous (9.5.2) license file, click the drop-down arrow on the **Download Product** button and select **9.5.2 License File** from the menu. The file is downloaded to your default download location.

Figure 29. Product Downloads and License Files page

Installing your license files for Practice Partner

Read the following instructions carefully.

If you are...	Then refer to...
upgrading Practice Partner to a new version	"To upgrade Practice Partner:" on page 41.
changing the number of licensed users of Practice Partner	"To change the number of licensed users:" on page 41.

Download your license files before you begin your upgrade of Practice Partner.

To upgrade Practice Partner:

1. Create a License folder on the **P:** drive (or whatever drive the ppart folder is on).
   a. Open Windows Explorer. Click Start, point to All Programs, point to Accessories, and then click **Windows Explorer**.
   b. Browse to the **P:** drive (or whatever drive the ppart folder is on).
   c. Create a new folder by right-clicking a blank area in a folder window or on the desktop, pointing to New, and then clicking **Folder**.
   d. Rename the default folder to **License** and press **Enter**.
2. Save the files attached to the e-mail in the **License** folder (usually P:\license). One of the files should be named **pplic.txt**. If this file doesn't exist (because some e-mail programs strip this file), please save the other file in the **License** folder and rename it to **pplic.txt**.
3. Begin your installation or upgrade of Practice Partner. During the install, you will be prompted to browse to the License folder (usually P:\license) where your license files are located.

To change the number of licensed users:

You must know the path to your Practice Partner data files directory (typically p:\ppart). All users must exit out of all Practice Partner applications.

1. Create a License folder on the **P:** drive (or whatever drive the ppart folder is on).
   a. Open Windows Explorer. Click Start, point to All Programs, point to Accessories, and then click **Windows Explorer**.
   b. Browse to the **P:** drive (or whatever drive the ppart folder is on).
   c. Create a new folder by right-clicking a blank area in a folder window or on the desktop, pointing to New, and then clicking **Folder**.
   d. Rename the default folder to **License** and press **Enter**.
2. Copy the downloaded license file to the **License** folder (usually P:\license). If that folder does not exist, create a new folder and name it **pplic.txt**. If the downloaded file was saved with a different file name, rename it to **pplic.txt**.
   a. From the Windows Taskbar, click the Start button and then select **Run** from the menu.
   b. Type the path to your Practice Partner data file directory followed by **\SETUSER2**. For example, if your data is located in p:\license, you would type:

p:\ppart\setuser2 p:\license

3. Click **OK**.

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