CGM LYTEC Upgrade Installation Guide

December 2022

CGM LYTEC

Practice Management and EHR
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Product
CGM Lytec 2023

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Chapter 1 - CGM LYTEC Hardware and Software Requirements

CGM LYTEC 2023 Single-User Hardware and Software Requirements

Hardware - Minimum Required

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU Type</td>
<td>Intel Pentium IV 4.2GHz or faster</td>
</tr>
<tr>
<td>RAM (Memory)</td>
<td>2GB</td>
</tr>
<tr>
<td>Storage Space available</td>
<td>4GB*</td>
</tr>
<tr>
<td>Network Card (NIC)</td>
<td>100Mbps</td>
</tr>
<tr>
<td>Display Monitor</td>
<td>1024x768 (1280x800 for widescreen displays)</td>
</tr>
</tbody>
</table>

Hardware - Recommended

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU Type</td>
<td>Pentium D 2.6GHz or faster</td>
</tr>
<tr>
<td>RAM (Memory)</td>
<td>8GB</td>
</tr>
<tr>
<td>Storage Space available</td>
<td>8GB*</td>
</tr>
<tr>
<td>Network Card (NIC)</td>
<td>1Gbps</td>
</tr>
<tr>
<td>Display Monitor</td>
<td>1024x768 (1280x800 for widescreen displays)</td>
</tr>
</tbody>
</table>

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

Workstation Operating System - Supported

- Windows 10 Pro/Enterprise (Windows 10 S and Home are NOT supported)
- Windows 11 Pro/Enterprise (Windows 11 Home is NOT supported)

Internet - Required

High-speed Cable, DSL, or Satellite Internet service.

Database - Version of SQL

CGM LYTEC Single User version uses SQL Server Express. With this application, the size of your database is limited to 10GB. SQL Server 2017 Express will use, at most, 1GB of RAM.

For SQL Server 2019 on Windows
SQL Server 2019 is NOT supported on Windows 8.1 or Windows Server 2012 or Windows Server 2012 R2.

For information on which versions of SQL Server are supported on versions of Windows Server and Windows, see https://learn.microsoft.com/en-us/troubleshoot/sql/general/use-sql-server-in-windows

CGM LYTEC 2023 Professional or Multi-User Hardware and Software Requirements

Server Hardware - Minimum Required

<table>
<thead>
<tr>
<th>CPU Type</th>
<th>Intel Pentium IV 4.3GHz or faster</th>
</tr>
</thead>
<tbody>
<tr>
<td>RAM (Memory)</td>
<td>2GB</td>
</tr>
<tr>
<td>Storage Space available</td>
<td>6GB*</td>
</tr>
<tr>
<td>Network Card (NIC)</td>
<td>100Mbps</td>
</tr>
<tr>
<td>Display Monitor</td>
<td>1024x768 (1280x800 for widescreen displays)</td>
</tr>
</tbody>
</table>

Server Hardware - Recommended

<table>
<thead>
<tr>
<th>CPU Type</th>
<th>Core 2 - 2.4GHz or faster</th>
</tr>
</thead>
<tbody>
<tr>
<td>RAM (Memory)</td>
<td>8GB</td>
</tr>
<tr>
<td>Storage Space available</td>
<td>8GB*</td>
</tr>
<tr>
<td>Network Card (NIC)</td>
<td>1Gbps</td>
</tr>
<tr>
<td>Display Monitor</td>
<td>1024x768 (1280x800 for widescreen displays)</td>
</tr>
</tbody>
</table>

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

Server Operating System - Supported

- Windows Server 2012 (64 Bit) (Microsoft support end of life is October 10, 2023)
- Windows Server 2012 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 Pro/Enterprise (Windows 10 S and Home are NOT supported)
- Windows 11 Pro/Enterprise (Windows 11 Home is NOT supported)
Network - Recommended
Consult with a licensed network vendor for proper wiring for your business computing environment. Wireless networks are not recommended. If a wireless network is the only option, eMDs requires the use of Terminal Services/RDP/ Thin Clients and does not support a direct connected wireless workstation.

Internet - Required
High-speed Cable, DSL, or Satellite Internet service.

Database - Version of SQL
Uses SQL Server 2017 Express. With this application, the size of your database is limited to 10GB. In addition, SQL Server 2017 Express will use, at most, 1GB of RAM.

For SQL Server 2019 on Windows
SQL Server 2019 is NOT supported on Windows 8.1 or Windows Server 2012 or Windows Server 2012 R2.

For information on which versions of SQL Server are supported on versions of Windows Server and Windows, see https://learn.microsoft.com/en-us/troubleshoot/sql/general/use-sql-server-in-windows

Workstation Hardware - Minimum Required

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</table>

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

Workstation Operating System - Supported
- Windows 10 Pro, Enterprise (Windows 10 S and Home are NOT supported)
- Windows 11 Pro/Enterprise (Windows 11 Home is NOT supported)
CGM LYTEC 2023 Client/Server Hardware and Software Requirements

Server Hardware - Minimum Required

<table>
<thead>
<tr>
<th>CPU Type</th>
<th>Intel Pentium IV 4.3GHz or faster</th>
</tr>
</thead>
<tbody>
<tr>
<td>RAM (Memory)</td>
<td>4GB</td>
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</table>

Server Hardware - Recommended

<table>
<thead>
<tr>
<th>CPU Type</th>
<th>Core 2 - 2.4GHz or faster</th>
</tr>
</thead>
<tbody>
<tr>
<td>RAM (Memory)</td>
<td>8GB</td>
</tr>
<tr>
<td>Storage Space available</td>
<td>8GB*</td>
</tr>
<tr>
<td>Network Card (NIC)</td>
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Server Operating System - Supported

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- Windows Server 2012 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 11 Pro/Enterprise (Windows 11 Home is NOT supported)

Microsoft SQL Database - Supported

- Microsoft SQL 2019*
- Microsoft SQL 2017

*CGM LYTEC Client/Server will continue to use Microsoft SQL 2012 if it is already installed; however, certain new CGM LYTEC features will not work with SQL 2012. SQL 2012 is no longer supported by Microsoft nor CGM so it must be upgraded. To upgrade SQL it will need to be purchased and installed separately.

*For SQL Server 2019 on Windows

SQL Server 2019 is NOT supported on Windows 8.1 or Windows Server 2012 or Windows Server 2012 R2.
For information on which versions of SQL Server are supported on versions of Windows Server and Windows, see https://learn.microsoft.com/en-us/troubleshoot/sql/general/use-sql-server-in-windows

**Network - Recommended**
Consult with a licensed network vendor for proper wiring for your business computing environment. Wireless networks are not recommended. If a wireless network is the only option, eMDs requires the use of Terminal Services/RDP/Thin Clients and does not support a direct connected wireless workstation.

**Internet - Required**
High-speed Cable, DSL, or Satellite Internet service.

**Workstation Hardware - Minimum Required**

<table>
<thead>
<tr>
<th>CPU Type</th>
<th>Intel Pentium IV 2GHz or faster</th>
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**Workstation Hardware - Recommended**

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</tr>
</thead>
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<td>RAM (Memory)</td>
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<td>1Gbps</td>
</tr>
<tr>
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<td>1024x768 (1280x800 for widescreen displays)</td>
</tr>
</tbody>
</table>

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

**Workstation Operating System - Supported**
- Windows 10 Pro, Enterprise (Windows 10 S and Home are NOT supported)
- Windows 11 Pro/Enterprise (Windows 11 Home is NOT supported)
Cgm Lytec 2023 Supported Operating Systems

*Windows 10 S and Home are NOT supported.
**Windows 11 Pro/Enterprise (Windows 11 Home is NOT supported)
***Microsoft support end of life is October 10, 2023

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 LYTEC 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.

Firewall settings

The following Platform Services APIs must all be allowed:

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Server</th>
<th>Workstation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 10 Pro, Enterprise*</td>
<td>N/A</td>
<td>Y</td>
</tr>
<tr>
<td>Windows 11 Pro/Enterprise**</td>
<td>N/A</td>
<td>Y</td>
</tr>
<tr>
<td>Windows Server 2012/2012 R2***, 2016 Standard, Datacenter, Essentials</td>
<td>Y</td>
<td>N/A</td>
</tr>
<tr>
<td>Windows Server 2019 Standard</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>

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

https://cnx.cgmus.com/
https://cnx-mh.cgmus.com/
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 Lytec SharedData 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 SharedData backup. Registration of CGM LYTEC is tied to the server, so if you do not have your Lytec SharedData backed up, you will need to contact CGM Support to get your registration deactivated so it can be entered again. Perform this onetime 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.

To back up your SharedData:

2. Click the “L” in the top left corner of the Lytec screen.
3. Click Backup and Restore Database.

![Figure 1. CGM LYTEC screen](image)
The Confirm SQL SysAdmin screen opens.

![Confirm SQL SysAdmin screen]

**Figure 2. Confirm SQL SysAdmin screen**

4. Enter your credentials and click the OK button. The Manage Backups screen opens.

![Manage Backups screen]

**Figure 3. Manage Backups screen**

5. Select Lytec SharedData and click the Backup button.

6. Follow the remaining prompts to create the backup.
Revenue Management uses Advantage Local Server. Advantage Local Server is limited to a maximum of five concurrent users. If you want to have more than five users accessing Revenue Management at the same time, you will need to upgrade to Advantage Database Server. Contact your Value Added Reseller for more information.
MPIC System Requirements

Hardware requirements

<table>
<thead>
<tr>
<th>CPU (Processor)</th>
<th>Equivalent of Intel Quad Core Xeon 1.6GHz</th>
</tr>
</thead>
<tbody>
<tr>
<td>RAM (Memory)</td>
<td>8GB</td>
</tr>
<tr>
<td>Storage Array Type</td>
<td>RAID-1</td>
</tr>
<tr>
<td>Network Card (NIC)</td>
<td>1Gbps (cannot be a teamed network card)</td>
</tr>
<tr>
<td>Hard Drive</td>
<td>At least 30GB</td>
</tr>
</tbody>
</table>

Software requirements

MPIC must be installed at the same location as your SQL 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
- Lytec 2014 SP1 or newer
- SQL Server Express 2017 or 2019*

*SQL server express is NOT installed with MPIC. For Lytec, MPIC will use the version of SQL Server Express or Standard that Lytec is using.

For SQL Server 2019 on Windows

SQL Server 2019 is NOT supported on Windows 8.1 or Windows Server 2012 or Windows Server 2012 R2.

For information on which versions of SQL Server are supported on versions of Windows Server and Windows, see [https://learn.microsoft.com/en-us/troubleshoot/sql/general/use-sql-server-in-windows](https://learn.microsoft.com/en-us/troubleshoot/sql/general/use-sql-server-in-windows)
CGM LYTEC MD 2023 Supported Operating Systems

<table>
<thead>
<tr>
<th>OPERATING SYSTEM</th>
<th>SERVER</th>
<th>WORKSTATION</th>
<th>DATABASE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 10 Pro Enterprise*</td>
<td>Y</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>Windows 11 Pro/Enterprise**</td>
<td>N/A</td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>

*CGM LYTEC MD is NOT supported for Windows 10 Home version for Patient Records and Medical Billing. Windows 10 S is NOT supported.

**Windows 11 Pro/Enterprise (Windows 11 Home is NOT supported)

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

****For SQL Server 2019 on Windows

SQL Server 2019 is NOT supported on Windows 8.1 or Windows Server 2012 or Windows Server 2012 R2.

For information on which versions of SQL Server are supported on versions of Windows Server and Windows, see [https://learn.microsoft.com/en-us/troubleshoot/sql/general/use-sql-server-in-windows](https://learn.microsoft.com/en-us/troubleshoot/sql/general/use-sql-server-in-windows)

For a complete list of all system requirements for CGM LYTEC MD, see CGM LYTEC MD System Requirements in the System Administration and System Requirements section of the CGM LYTEC 2023 Documentation page in Salesforce.

CGM LYTEC MD Best Practices

eMDs provides both requirements and recommendations for CGM LYTEC MD best practices.
### Required best practices

The following table lists the required best practices for using CGM LYTEC MD.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Comments</th>
</tr>
</thead>
</table>
| CGM LYTEC MD Application Folder | The CGM LYTEC MD application folder must be on its own logical partition.  
                                 | The logical drive on your application server must be a drive letter that is not reserved by any workstation (P: is the recommended drive letter).  
                                 | The drive letter where the application folder resides on the application server must be available to be mapped on every CGM LYTEC MD computer. |
| Backups                        | Backups are required. eMDs recommends a tape rotation with periodic offsite backups.  
                                 | eMDs CGM LYTEC MD does not install, support, or maintain backup solutions. This is the responsibility of the customer.  
                                 | eMDs CGM LYTEC MD cannot be held responsible for data loss incurred due to incomplete or corrupt backups. |
| Anti-virus Solutions           | An anti-virus solution must be installed with the eMDs-recommended configurations.  
                                 | The application folder and client folder must be excluded from real-time/on-access scanning.  
                                 | eMDs recommends scheduled scans when users are not in the system.  
                                 | Windows Defender is installed for versions 8.0 and above and is recommended by eMDs.  
                                 | Ensure that exclusions are set. eMDs recommends turning off Windows Defender during installation, otherwise it may interact with files and some files may not get installed.  
                                 | Trend Micro and CA eTrust are unapproved anti-virus solutions that may cause instability in the Practice Partner application.  
                                 | Any anti-virus that does not allow for exclusions should not be installed. If asked by Support, you must be able to show the exclusions. |
The following table lists the recommended best practices for using CGM LYTEC MD.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle or SQL Database Platforms</td>
<td>Customers using the Oracle or SQL database platforms must have qualified DBA services. This can be a full-time employee of the organization or a contractor. eMDs does offer a variety of DBA service solutions as additional service contract fees.</td>
</tr>
<tr>
<td>Teamed Network Interface Cards</td>
<td>The use of teamed network interface cards (NICs) is not supported.</td>
</tr>
<tr>
<td>Domain/Active Directory Infrastructure</td>
<td>CGM LYTEC MD requires a domain/Active Directory infrastructure.</td>
</tr>
<tr>
<td>New Technology File System (NTFS)</td>
<td>NTFS is required due to the necessity to set file permissions.</td>
</tr>
<tr>
<td>Microsoft Security</td>
<td>The following Microsoft security features and software must be disabled.</td>
</tr>
<tr>
<td></td>
<td>• User Account Control (UAC)</td>
</tr>
<tr>
<td></td>
<td>• Data Execution Prevention (DEP)</td>
</tr>
<tr>
<td></td>
<td>• Windows Firewall</td>
</tr>
<tr>
<td>Permissions</td>
<td>The following items’ permissions must be set to full control on the ppart drive.</td>
</tr>
<tr>
<td></td>
<td>• Network Service</td>
</tr>
<tr>
<td></td>
<td>• System</td>
</tr>
<tr>
<td></td>
<td>• Domain users</td>
</tr>
<tr>
<td></td>
<td>• Domain Admin</td>
</tr>
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<thead>
<tr>
<th>Topic</th>
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<tbody>
<tr>
<td>Windows Pagefile</td>
<td>The Windows pagefile should be on its own disk controller and should be two times the amount of RAM in the machine.</td>
</tr>
<tr>
<td>Domain Name Servers (DNS)</td>
<td>DNS should be on the same subnet as the CGM LYTEC MD servers.</td>
</tr>
<tr>
<td>Hardware</td>
<td>eMDs highly recommends hardware from experienced and trusted vendors such as HP, Dell, and IBM. eMDs strongly discourages White-box servers.</td>
</tr>
<tr>
<td>Operating System Partition</td>
<td>Provision enough space on your operating system partition for growth. eMDs recommends 32GB+ for your operating system partition.</td>
</tr>
</tbody>
</table>
SQL Server 2017 Upgrade

The table below explains the upgrade path for the different versions of CGM LYTEC.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Firewalls</td>
<td>Customers should have a hardware-level firewall protecting their network.</td>
</tr>
</tbody>
</table>

### SQL Server 2017 Upgrade

This document contains instructions for all versions of CGM LYTEC, including CGM LYTEC MD. Please carefully review the instructions for your version of CGM LYTEC and hardware and software requirements (see “CGM LYTEC Hardware and Software Requirements” on page 1) before installing the software.

#### CGM LYTEC Installation Overview

This document contains instructions for all versions of CGM LYTEC, including CGM LYTEC MD. Please carefully review the instructions for your version of CGM LYTEC and hardware and software requirements (see “CGM LYTEC Hardware and Software Requirements” on page 1) before installing the software.
Chapter 2 - CGM LYTEC Single-User Installation

Before you begin

Make a backup of your practice data in the prior release before installing CGM LYTEC.

Use an administrator account with full privileges when installing the software.

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 2021 and are upgrading to 2023, be sure to upgrade to 2022 FIRST, register and convert your practice data. Then, from version 2022 upgrade to 2023.

Do not uninstall your previous version of CGM LYTEC. Uninstalling previous versions of CGM LYTEC is not required for upgrading and in most cases not necessary or recommended. eMDs recommends that you keep older versions of CGM LYTEC. If you do uninstall, make a backup of the application and databases first. In addition, you must reinstall CGM LYTEC 2023 (if you installed it prior to uninstalling the older version) to restore any shared components that may have been removed when you uninstalled the old version.

Disable MPIC.

In some instances, you may have to restart the CGM LYTEC installation after the .NET framework is installed. If this occurs, the installation will close after installing .NET. Restart the installation. This situation can occur with older versions of the .NET framework on the PC.

If you are extracting the ISO or webinstall file to the hard drive prior to installing, extract to a folder that is immediately off the root drive and the folder name must be shorter than 8 characters. For example, c:\Install. Do NOT use a long folder name.

Make sure that Windows PowerShell is installed (if installing via webinstall). To see if it is installed, click Start and then Run. Type Powershell and press ENTER. If Windows PowerShell is not installed, follow the instructions to install. See “Installing Windows PowerShell” on page 77.

Reboot your server and/or workstation.

Important Installation note

eMDs highly recommends that you install SQL Server 2017 using the automatic process in the CGM LYTEC installer. However, if you choose to install SQL Server 2017 manually, you MUST install/enable (depending on your operating system) .NET 3.5 FIRST. Failure to do so will cause issues with eligibility verification.
Pre-installation Recommendations

1. If SQL Management Studio Express is installed, uninstall it prior to installing CGM LYTEC. For steps to do so, see “Uninstalling SQL Management Studio Express 2005” on page 103.

   If you are unsure, follow the steps for uninstalling it. If it does not show up on the list of installed programs, then it is not installed.

2. Make sure your Windows operating system has the latest service pack installed. This will be checked during installation.

Linking to Other Applications

You can link CGM LYTEC to certain other applications, such as Practice Partner, using MPIC. Refer to “Linking CGM LYTEC With Other Applications” on page 111 for more information on MPIC and how to download it.

Installation

1. Disable UAC (User Account Control) prior to installing on each workstation. Once it is disabled, you will need to reboot the computer for the changes to take effect. In addition, disable any anti-virus applications prior to installation. Be sure to re-enable both UAC and anti-virus applications after installation.

2. Download the ISO for CGM LYTEC MD from the CGM LYTEC and CGM LYTEC MD Download Links page in Support Center.

3. Extract 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 LYTEC.msi. Always use autorun.exe.

4. Click Install CGM LYTEC. The CGM LYTEC 2023 Installation – Welcome screen appears.

5. Click the Next button. The End User License Agreement screen appears. Review the terms of the agreement and click I accept the agreement.

6. Click the Next button. The Select Installation Type screen appears. Select the CGM LYTEC Single User button.
7. Click the **Next** button. The Select CGM LYTEC Server Components screen appears. Select which components you want to install.

![Select CGM LYTEC Server Components](image)

**Lytec Components**

- Please select the components to install:
  - SQL Server
  - Lytec Client
  - Crystal Reports
  - Predefined Forms

**Figure 4. Select CGM LYTEC Server Components screen**

8. Click the **Next** button. The Select Target Folder screen appears.

**NOTE:** eMDs recommends that you use the default program folder location.

9. Click the **Next** button. The Select Data Folder appears. Either leave the default or click the **Browse** button to find a different folder.

10. Click the **Next** button. The SQL Server Setup screen appears if you selected SQL Server on the Select Components to Install screen.

   During the installation, CGM LYTEC will install SQL Server Express in the Data Folder and use it to manage your practice database. Use this screen to set up the SQL instance that CGM LYTEC will use for its practice database. You will need the information you enter here when you start CGM LYTEC and specify the default SQL credentials.

   **If you use MPIC, you MUST use LYTECM as your instance name.**

![SQL Server Setup](image)

**SQL Server Setup**

- What is the name of the SQL instance you would like to use? **LytecMD**
- What is the password for the System Administrator? **LytecMD**

The password needs to consist of at least 8 characters and must contain at least one uppercase letter, a lowercase letter, a numeral and a special symbol.

**Figure 5. SQL Server Setup screen**

**SQL Server 2017 password requirements:**

- The password does not contain all or part of the account name of the user.
- The password is at least eight characters long.
- The password contains characters from three of the following four categories:
  - Latin uppercase letters (A through Z)
  - Latin lowercase letters (a through z)
  - Base 10 digits (0 through 9)
  - Non-alphanumeric characters such as: exclamation point (!), dollar sign ($), number sign (#), or percent (%).
- Passwords can be up to 128 characters long. Use passwords that are as long and complex as possible.
Note the password requirements above. Failure to create a password that meets these requirements WILL cause the installation to fail.

**IMPORTANT:** For security purposes, eMDs recommends that you change the default shown here to something unique, especially if you have more than one CGM LYTEC server on your network.

11. Click the **Next** button. The Start Installation screen appears.
12. Click the **Next** button. The Installing screen appears and tracks the progress of the install.
13. Reboot the computer when the installation is complete.
14. Start CGM LYTEC.
15. Specify the default SQL server credentials. For step by step instructions, go to “Specifying the Default SQL Server Credentials” on page 81.
16. Register the program.
17. If you are upgrading from CGM LYTEC 2010 or below, you will need to migrate your existing database to a new location. For instructions, go to “Migrating existing databases” on page 82.
18. Convert your practice data. Instructions are found at “Converting practices” on page 83.

**Account Registration**

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

![Figure 6. Account Registration screen](image)

**Important:** The Customer Account ID is case-sensitive.

Note: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec 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 Lytec.

**Recommendation**

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData 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 backup. Registration of Lytec 2023 is tied to the server, so if you do not have your Lytec SharedData 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.

For steps to backup your SharedData, see “Important New Backup Information” on page 7.
Account Registration Process Troubleshooting

If you have verified that you do not have a prior installation of Lytec 2023 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:

![Error message](image)

**Figure 7. 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:

<table>
<thead>
<tr>
<th>URL</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>identity.emdscloud.com</td>
<td>eligibilitybenefits.emdscloud.com</td>
</tr>
<tr>
<td>licensing.emdscloud.com</td>
<td>ppsmobile.emds.com</td>
</tr>
<tr>
<td>terminology.emdscloud.com</td>
<td>api.emdscloud.com</td>
</tr>
</tbody>
</table>

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

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

**Lytec Passwords**

In Lytec 2022 and newer, Passwords are case sensitive.
Chapter 3 - CGM LYTEC Professional or Multi-User Installation

Before you begin

Make a backup of your practice data in the prior release before installing CGM LYTEC.

Use an administrator account with full privileges when installing the software.

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 2021 and are upgrading to 2023, be sure to upgrade to 2022 FIRST, register and convert your practice data. Then, from version 2022 upgrade to 2023.

Do not uninstall your previous version of CGM LYTEC. Uninstalling previous versions of CGM LYTEC is not required after upgrading and in most cases not necessary or recommended. eMDs recommends that you keep older versions of CGM LYTEC. If you do uninstall, make a backup of the application and databases first. In addition, you must reinstall CGM LYTEC 2023 (if you installed it prior to uninstalling the older version) to restore any shared components that may have been removed when you uninstalled the old version.

Disable MPIC if it is running.

In some instances, you may have to restart the CGM LYTEC installation after the .NET framework is installed. If this occurs, the installation will close after installing .NET. Restart the installation. This situation can occur with older versions of the .NET framework on the PC.

If you are extracting the ISO or webinstall file to the hard drive prior to installing, extract to a folder that is immediately off the root drive and the folder name must be shorter than 8 characters. For example, c:\Install. Do NOT use a long folder name.

Reboot your server and/or workstation.

Important Installation note

eMDs highly recommends that you install SQL Server 2017 using the automatic process in the CGM LYTEC installer. However, if you choose to install SQL Server 2017 manually, you MUST install/enable (depending on your operating system) .NET 3.5 FIRST. Failure to do so will cause issues with eligibility verification.

Pre-installation Recommendations

1. If SQL Management Studio Express is installed on your server computer, uninstall it prior to installing CGM LYTEC. For steps to do so, see “Uninstalling SQL Management Studio Express 2005” on page 103.
2. Make sure your Windows operating system has the latest service pack installed. This will be checked during installation.

**Linking to Other Applications**

You can link CGM LYTEC to certain other applications, such as Practice Partner, using MPIC. Refer to “Linking CGM LYTEC With Other Applications” on page 111 for more information on MPIC and how to download it.

If you are currently linked to other applications or want to link to other applications, you must use MPIC going forward. Communications Manager is no longer available.

**Overview**

There are four major steps for installing CGM LYTEC Professional or Multi-User on a network:

1. Install CGM LYTEC on the server.
2. Migrate the existing database to the new SQL instance if you are upgrading from CGM LYTEC 2010 or earlier.
3. Convert your existing practice.
4. Install CGM LYTEC on each workstation.

These instructions take you through each step.

**Server Installation and Setup**

**Installing on the Server**

1. Disable UAC (User Account Control) prior to installing on each workstation. Once it is disabled, you will need to reboot the computer for the changes to take effect. In addition, disable any anti-virus applications prior to installation. Be sure to re-enable both UAC and anti-virus applications after installation.

2. Download the ISO for CGM LYTEC MD from the CGM LYTEC and CGM LYTEC MD Download Links page in Support Center.

3. Extract 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 LYTEC.msi. Doing so may result in failure of the installation. Always use autorun.exe.

4. On the CGM LYTEC Installation screen, click Install CGM LYTEC. The CGM LYTEC 2023 Installation – Welcome screen appears.

5. Click the Next button. The End User License Agreement screen appears. Review the terms of the agreement and click I accept the agreement.
6. Click the **Next** button. The Installation Type screen appears. Depending on the product purchased, select either the **CGM LYTEC Multi User** button or the **CGM LYTEC Professional** button.

7. Click the **Next** button. The Select Installation Mode screen appears.

8. Select **Server**.

9. Click the **Next** button. The Select CGM LYTEC Server Components screen appears. Select the components you want to install.

10. Click the **Next** button. The Select Target Folder screen appears.

11. Click the **Next** button. The Select Data Folder screen appears. Specify the folder on the server where the practice data will be stored.

12. Click the **Next** button. The SQL Server Setup screen opens if you selected the SQL Server check box on the Select Components to Install screen. Enter the name of the SQL instance and the password for the system administrator. You will need this information when you specify the default SQL instance later, both on the server machine and the client workstations.

   If you use MPIC, you MUST use LYTECMD as your instance name.
SQL Server 2017 password requirements:
- The password does not contain all or part of the account name of the user.
- The password is at least eight characters long.
- The password contains characters from three of the following four categories:
  - Latin uppercase letters (A through Z)
  - Latin lowercase letters (a through z)
  - Base 10 digits (0 through 9)
  - Non-alphanumeric characters such as: exclamation point (!), dollar sign ($), number sign (#), or percent (%).
- Passwords can be up to 128 characters long. Use passwords that are as long and complex as possible.

Note the password requirements above. Failure to create a password that meets these requirements WILL cause the installation to fail.

**IMPORTANT:** For security purposes, eMDs recommends that you change the default shown here to something unique, especially if you have more than one CGM LYTEC server on your network.

13. Click the **Next** button.
14. The Start Installation screen appears. This screen will tell you what type of installation you are actually performing, so what it says may differ from what appears here.
15. Click the **Next** button. The Installing screen appears and tracks the progress of the install.
16. Reboot the computer when the installation is complete.
17. Start CGM LYTEC and specify the default SQL server credentials. For step by step instructions, go to “Specifying the Default SQL Server Credentials” on page 81.
18. Following that, migrate existing databases to the new SQL instance if you are upgrading from Lytec 2010 or earlier. See “Migrating existing databases” on page 82.
19. Convert existing practices. See “Converting practices” on page 83.
20. After you are finished setting up a practice or converting, go to “Workstation Installation and Setup” on page 26 for information on installing and setting up the program on a workstation.

**Account Registration**

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

![Account Registration screen](image)

*Figure 10. Account Registration screen*
Important: The Customer Account ID is case-sensitive.

Note: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec 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 Lytec.

Recommendation
It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData 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 backup. Registration of Lytec 2023 is tied to the server, so if you do not have your Lytec SharedData 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.

For steps to backup your SharedData, see “Important New Backup Information “ on page 7.

Account Registration Process Troubleshooting
If you have verified that you do not have a prior installation of Lytec 2023 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:

![Error Message](image)

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

<table>
<thead>
<tr>
<th>identity.emdscloud.com</th>
<th>eligibilitybenefits.emdscloud.com</th>
</tr>
</thead>
<tbody>
<tr>
<td>licensing.emdscloud.com</td>
<td>ppsmobile.emds.com</td>
</tr>
<tr>
<td>terminology.emdscloud.com</td>
<td>api.emdscloud.com</td>
</tr>
</tbody>
</table>

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

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

Lytec Passwords
In Lytec 2022 and newer, Passwords are case sensitive.
Workstation Installation and Setup

1. Disable UAC (User Account Control) prior to installing on each workstation. Once it is disabled, you will need to reboot the computer for the changes to take effect. In addition, disable any anti-virus applications prior to installation. Be sure to re-enable both UAC and anti-virus applications after installation.

2. Launch autorun.exe. The CGM LYTEC Installation screen appears. eMDs recommends that you do NOT attempt to install using any of the programs with the extension *.msi, such as LYTEC.msi. Doing so may result in failure of the installation. Always use autorun.exe.

3. On the CGM LYTEC Installation screen, click Install CGM LYTEC. The CGM LYTEC 2023 Installation – Welcome screen appears.

4. Click the Next button. The End User License Agreement screen appears. Select I accept the agreement.

5. Click the Next button. The Installation Type screen appears. Depending on the product purchased, select either the CGM LYTEC Multi User button or the CGM LYTEC Professional button.

6. Click the Next button. The Select Installation Mode screen appears.

7. Select Client.

Figure 12. Select Installation Mode screen
8. Click the Next button. The Select CGM LYTEC Server Components screen appears. Select the components you want to install.

![Select CGM LYTEC Client Components screen](image)

**CGM LYTEC Client:** Use this CGM LYTEC software that to enter information for your practice. For the client installation, this option is automatically selected.

**Crystal Reports:** Use this program to print and generate reports. You must select this check box for a complete installation of CGM LYTEC.

**Predefined Forms:** Forms you can use with CGM LYTEC.

**Figure 13. Select CGM LYTEC Client Components screen**

| Warning: Ensure that you have selected Predefined Forms. If you leave this check box cleared, existed forms will be deleted during install. |

9. Click the Next button. The Select Target Folder screen appears.

**NOTE:** eMDs recommends that you use the default program folder location.

10. Click the Next button. The Start Installation screen appears.
11. Reboot the computer when the installation is complete.
12. Repeat these steps for each workstation on which you want to install CGM LYTEC.

### Account Registration

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

![Account Registration screen](image)

**Figure 14. Account Registration screen**

- **Customer Account ID**
- **Customer Name**

| Important: The Customer Account ID is case-sensitive. |

| Note: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec 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 Lytec.

**Recommendation**

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData 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 backup. Registration of Lytec 2023 is tied to the server, so if you do not have your Lytec SharedData 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.

For steps to backup your SharedData, see “Important New Backup Information” on page 7.

**Account Registration Process Troubleshooting**

If you have verified that you do not have a prior installation of Lytec 2023 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 15. Error message](image)

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

<table>
<thead>
<tr>
<th>identity.emdscloud.com</th>
<th>eligibilitybenefits.emdscloud.com</th>
</tr>
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</tr>
<tr>
<td>terminology.emdscloud.com</td>
<td>api.emdscloud.com</td>
</tr>
</tbody>
</table>

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

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

**Lytec Passwords**

In Lytec 2022 and newer, Passwords are case sensitive.
Chapter 4 - CGM LYTEC Client/Server Installation

Before you begin

Make a backup of your practice data in the prior release before installing CGM LYTEC.

Use an administrator account with full privileges when installing the software.

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 2021 and are upgrading to 2023, be sure to upgrade to 2022 FIRST, register and convert your practice data. Then, from version 2022 upgrade to 2023.

Do not uninstall your previous version of CGM LYTEC. Uninstalling previous versions of CGM LYTEC is not required after upgrading and in most cases not necessary or recommended. eMDs recommends that you keep older versions of CGM LYTEC. If you do uninstall, make a backup of the application and databases first. In addition, you must reinstall CGM LYTEC 2023 (if you installed it prior to uninstalling the older version) to restore any shared components that may have been removed when you uninstalled the old version.

Disable MPIC.

In some instances, you may have to restart the CGM LYTEC installation after the .NET framework is installed. If this occurs, the installation will close after installing .NET. Restart the installation. This situation can occur with older versions of the .NET framework on the PC.

If you are extracting the ISO or webinstall file to the hard drive prior to installing, extract to a folder that is immediately off the root drive and the folder name must be shorter than 8 characters. For example, c:\Install. Do NOT use a long folder name.

Reboot your server and/or workstation.

Important Installation note

eMDs highly recommends that you install SQL Server 2017 using the automatic process in the CGM LYTEC installer. However, if you choose to install SQL Server 2017 manually, you MUST install/enable (depending on your operating system) .NET 3.5 FIRST. Failure to do so will cause issues with eligibility verification.

Pre-installation Recommendations

1. If SQL Management Studio Express is installed on your server computer, uninstall it prior to installing CGM LYTEC. For steps to do so, see “Uninstalling SQL Management Studio Express 2005” on page 103.
If you are unsure, follow the steps for uninstalling it. If it does not show up on the list of installed programs, then it is not installed.

2. Make sure your Windows operating system has the latest service pack installed. This will be checked during installation.

Linking to Other Applications

You can link CGM LYTEC to certain other applications, such as Practice Partner, using MPIC. Refer to “Linking CGM LYTEC With Other Applications” on page 111 for more information on MPIC and how to download it.

If you are currently linked to other applications or want to link to other applications, you must use MPIC going forward. Communications Manager is no longer available.

Overview

There are four major steps for installing CGM LYTEC Client/Server:

1. Install and set up CGM LYTEC on the server.
2. Migrate the existing database to the new SQL instance if you are upgrading from CGM LYTEC 2010 or earlier.
3. Convert existing practices.
4. Install CGM LYTEC on each workstation.

These instructions take you through each step.

Server Installation and Setup

Perform the server installation on a computer with a supported server operating system (Windows Server 2012, Windows Server 2016, or Windows Server 2019) using an administrator account with full privileges.

Unless instructed, accept all default choices and follow all the default screen prompts.

Installation

1. Disable UAC (User Account Control) prior to installing on each workstation. Once it is disabled, you will need to reboot the computer for the changes to take effect. In addition, disable any anti-virus applications prior to installation. Be sure to re-enable both UAC and anti-virus applications after installation.

2. Download the ISO for CGM LYTEC MD from the CGM LYTEC and CGM LYTEC MD Download Links page in Support Center.
3. Extract 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 LYTEC.msi. Doing so may result in failure of the installation. Always use autorun.exe.

4. On the CGM LYTEC Installation screen, click Install CGM LYTEC. The CGM LYTEC Installation – Welcome screen appears.

5. Click the Next button. The End User License Agreement screen appears. Review the terms of the agreement and click I accept the agreement.

6. Click the Next button. The Installation Type screen appears. Select the CGM LYTEC Client Server button.

7. Click the Next button. The Installation Mode screen appears.

8. Select the Server button.

![Select Installation Mode screen](image)

Figure 16. Select Installation Mode screen

9. Click the Next button. The Select CGM LYTEC Server Components screen appears. Make your selections.

10. Click the Next button.

![Select CGM LYTEC Server Components screen](image)

Figure 17. Select CGM LYTEC Server Components screen

11. The Select Target Folder screen appears.

SQL Server: The database engine used by CGM LYTEC.

CGM LYTEC Client: Use this CGM LYTEC software to enter information for your practice.

Crystal Reports: Use this reporting program to print and generate reports. You must select this check box for a complete installation of CGM LYTEC.

Predefined Forms: Forms you can use with CGM LYTEC.
12. Click the **Next** button. The Select Data Folder screen appears.

13. Click the **Next** button. The SQL Server Setup screen opens if you selected SQL Server on the Select Components to Install screen. Enter the name of the SQL instance and the password for the system administrator. You will need this information when you specify the default SQL instance later, for the server database and the client computers.

If you use MPIC, you MUST use LYTECMD as your instance name.

**SQL Server 2017 password requirements:**

- The password does not contain all or part of the account name of the user.
- The password is at least eight characters long.
- The password contains characters from three of the following four categories:
  - Latin uppercase letters (A through Z)
  - Latin lowercase letters (a through z)
  - Base 10 digits (0 through 9)
  - Non-alphanumeric characters such as: exclamation point (!), dollar sign ($), number sign (#), or percent (%).
- Passwords can be up to 128 characters long. Use passwords that are as long and complex as possible.

**Note the password requirements above. Failure to create a password that meets these requirements WILL cause the installation to fail.**

**IMPORTANT:** For security purposes, eMDs recommends that you change the default shown here to something unique, especially if you have more than one CGM LYTEC server on your network.

14. Click the **Next** button.

15. Click the **Next** button. The Start Installation screen appears.

16. Click the **Next** button. The Installing screen appears and tracks the progress of the install.

17. Reboot the computer when the installation is complete.

18. Start CGM LYTEC and specify the default SQL server credentials. For step by step instructions, go to “Specifying the Default SQL Server Credentials” on page 81.

19. Following that, you will find steps to creating a new practice or converting existing practices.

20. After you are finished setting up a practice or converting, go to “Workstation Installation and Setup” on page 34 for information on installing and setting up the program on a workstation.
Account Registration

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

![Account Registration Screen]

Figure 18. Account Registration screen

Important: The Customer Account ID is case-sensitive.

Note: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec 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 Lytec.

Recommendation

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData 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 backup. Registration of Lytec 2023 is tied to the server, so if you do not have your Lytec SharedData 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.

For steps to back up your SharedData, see “Important New Backup Information” on page 7.

Account Registration Process Troubleshooting

If you have verified that you do not have a prior installation of CGM LYTEC 2023 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:

![Error Message]

Figure 19. 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:

<table>
<thead>
<tr>
<th>identity.emdscloud.com</th>
<th>eligibilitybenefits.emdscloud.com</th>
</tr>
</thead>
<tbody>
<tr>
<td>licensing.emdscloud.com</td>
<td>ppsmobile.emds.com</td>
</tr>
</tbody>
</table>
In addition, the two below are required if you are using CGM CONNECTION:
https://cnx.cgmus.com/
https://cnx-mh.cgmus.com/

Lytec Passwords
In Lytec 2022 and newer, Passwords are case sensitive.

Workstation Installation and Setup

1. Disable UAC (User Account Control) prior to installing on each workstation. Once it is disabled, you will need to reboot the computer for the changes to take effect. In addition, disable any anti-virus applications prior to installation. Be sure to re-enable both UAC and anti-virus applications after installation.

2. Launch autorun.exe. The CGM LYTEC Installation screen appears. eMDs recommends that you do NOT attempt to install using any of the programs with the extension *.msi, such as LYTEC.msi. Doing so may result in failure of the installation. Always use autorun.exe.

3. On the CGM LYTEC Installation screen, click Install CGM LYTEC. The CGM LYTEC 2023 Installation – Welcome screen appears.

4. Click the Next button. The End User License Agreement screen appears. Review the terms of the agreement and click I accept the agreement.

5. Click the Next button. The Installation Type screen appears. Select the CGM LYTEC Client Server button.

6. Click the Next button. The Select Installation Mode screen appears. Select the Client button.

![Select Installation Mode screen](image)
7. Click the **Next** button. The Select CGM LYTEC Client Components screen appears. Select your components.

![Select LYTEC Client Components screen](image)

**LYTEC Client**: Use this CGM LYTEC software to enter information for your practice. For the client installation, this option is automatically selected.

**Crystal Reports**: Use this reporting program to print and generate reports. You must select this check box for a complete installation of CGM LYTEC.

**Predefined Forms**: Forms you can use with CGM LYTEC.

---

8. Click the **Next** button. The Select Target Folder screen appears.
9. Click the **Next** button. The Start Installation screen appears.
10. Click the **Next** button. Let the installation complete.
11. Reboot the computer when the installation is complete.
12. Repeat these steps for each workstation on which you want to install CGM LYTEC.

---

**Account Registration**

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

![Account Registration screen](image)

**Important**: The Customer Account ID is case-sensitive.

**Note**: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec 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 Lytec.
**Recommendation**

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData 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 backup. Registration of Lytec 2023 is tied to the server, so if you do not have your Lytec SharedData 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.

For steps to back up your SharedData, see “Important New Backup Information” on page 7.

**Account Registration Process Troubleshooting**

If you have verified that you do not have a prior installation of Lytec 2023 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:

![Error Message](image)

**Figure 23. 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:

<table>
<thead>
<tr>
<th>identity.emdscloud.com</th>
<th>eligibilitybenefits.emdscloud.com</th>
</tr>
</thead>
<tbody>
<tr>
<td>licensing.emdscloud.com</td>
<td>ppsmobile.emds.com</td>
</tr>
<tr>
<td>terminology.emdscloud.com</td>
<td>api.emdscloud.com</td>
</tr>
</tbody>
</table>

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

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

**Lytec Passwords**

In Lytec 2022 and newer, Passwords are case sensitive.
Chapter 5 - CGM LYTEC MD Installation

This chapter provides information for upgrading CGM LYTEC MD.

You can find several guides for using CGM LYTEC MD on your CGM LYTECMD installation download. You can access them from the Autorun menu when you launch the download.

Do not uninstall your previous version of CGM LYTEC MD. Uninstalling previous versions of CGM LYTEC MD is not required after upgrading and in most cases not necessary or recommended.

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 2021 and are upgrading to 2023, be sure to upgrade to 2022 FIRST, register and convert your practice data. Then, from version 2022 upgrade to 2023.

Important Installation note

eMDs highly recommends that you install SQL Server 2017 using the automatic process in the CGM LYTEC installer. However, if you choose to install SQL Server 2017 manually, you MUST install/enable (depending on your operating system) .NET 3.5 FIRST. Failure to do so will cause issues with eligibility verification.

Upgrade Paths

Below is a table showing you the upgrade path to CGM LYTEC MD.

- If you are using Practice Partner 9.3.x, you must update to Practice Partner 9.4 (CGM LYTEC MD 2010 SP1) first.
- Then, you must upgrade to Practice Partner 9.5.x (CGM LYTEC 2013). Finally, you can upgrade to CGM LYTEC 2023.

<table>
<thead>
<tr>
<th>Starting Version</th>
<th>Maximum Upgrade Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>CGM LYTEC 2009 (PP 9.3.x)</td>
<td>CGM LYTEC 2010 SP1 (PP 9.4)</td>
</tr>
<tr>
<td>CGM LYTEC 2010 (PP 9.3.x)</td>
<td>CGM LYTEC 2010 SP1 (PP 9.4)</td>
</tr>
<tr>
<td>CGM LYTEC 2010 SP1 (PP 9.4.x)</td>
<td>CGM LYTEC 2013 SP1 (PP 9.5.2)</td>
</tr>
<tr>
<td>CGM LYTEC 2011 (PP 9.5)</td>
<td>CGM LYTEC 2013 SP1 (PP 9.5.2)</td>
</tr>
<tr>
<td>CGM LYTEC 2011 SP1 (PP 9.5.1)</td>
<td>CGM LYTEC 2013 SP1 (PP 9.5.2)</td>
</tr>
</tbody>
</table>
Upgrading to Web View 11.0

Email the eMDs Web View Setup team at least one week (or more) prior to upgrading to CGM LYTEC MD to inform the team of your upcoming upgrade. After your organization upgrades to Web View 11.0, eMDs must complete the set up needed for Web View 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 Web View URL in the email.

Installing on a Domain Controller

You no longer need to install SQL Server manually prior to installing CGM LYTEC. eMDs recommends that you simply start the installer and allow it to install SQL automatically. You will be prompted for a domain account Login and Password at the appropriate time in the procedure.

Upgrade overview

The following steps overview the process for installing CGM LYTEC MD.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Complete applicable pre-installation tasks for CGM LYTEC MD.</td>
<td>40</td>
</tr>
<tr>
<td>2</td>
<td>Install CGM LYTEC MD Server and CGM LYTEC Client on your server.</td>
<td>52</td>
</tr>
</tbody>
</table>
Do not rename or move the CGM LYTEC MD directory after the installation. This directory is used to register files, and the program may fail to work if the directory name is changed.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Install CGM LYTEC MD Client and CGM LYTEC Client on your client workstations.</td>
<td>60</td>
</tr>
<tr>
<td>4</td>
<td>Complete applicable post-installation tasks.</td>
<td>81</td>
</tr>
</tbody>
</table>
Backup and restore process

Make a full cold backup of your Lytec MD 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 ppart backup, if there is a need to have a system restore, this would be what you would need for a catastrophic restore.

If you have SQL on another machine, make backups of that SQL database also.

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. After the complete system restore, run the MigrateToEmdsRx.exe utility rollback option so that you can e-prescribe on the old system. You can try the migration again at a later date.

Pre-installation tasks

Before installation, complete the tasks in the following table.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
</table>
| Verify that SQL Server Express is NOT installed | Your upgrade will fail if you have SQL Server Express installed instead of the full version of SQL Server. To check your version:  
1. Run the following command line in the SSMS(SQL Server Management Studio) query window.  
   
   SELECT SERVERPROPERTY('productversion'), SERVERPROPERTY ('productlevel'), SERVERPROPERTY ('edition')  
   
2. The correct response is “Stand Edition x64 bit.” If the response is “Express,” you must uninstall SQL Server Express and install the full SQL server before continuing. |
| Uninstall SQL Management Studio Express 2005 | If SQL Management Studio Express 2005 is installed on your server computer, uninstall it prior to installing CGM LYTEC. For steps to do so, see “Uninstalling SQL Management Studio Express 2005” on page 103.  
If you are unsure, follow the steps for uninstalling it. If it does not show up on the list of installed programs, then it is not installed. |

Patient Records Tasks
<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run the Clinical Quality Measures (CQM) report</td>
<td>Run the CQM report for your 2011 measures (that is, the measures supported in Practice Partner 9.5.2) and retain copies of your existing CQM reports before upgrading. The CQM Report for Practice Partner 11.0 supports the new 2014 CQM measures. After upgrading, you will not be able to generate the report for 2011 measures. For more information, see the Clinical Quality Measures Report User’s Guide.</td>
</tr>
<tr>
<td>Sign off on all Lab Review items</td>
<td>Sign off on all Lab Review items before upgrading. Due to Lab Review template enhancements, the display order has changed in CGM LYTEC MD 2023. Unsigned results that remain in review bins after the upgrade may cause some performance issues (for example, a delay in opening review screens).</td>
</tr>
<tr>
<td>Sign off on all Note Review items</td>
<td>Sign off on all Note Review items before the upgrade. Unsigned results that remain in review bins after upgrading may cause some performance issues (for example, a delay in opening notes).</td>
</tr>
<tr>
<td>Verify that the BulkDataLoad files are present in the ppart file.</td>
<td>Verify that the BulkDataLoad files are present in the ppart file before the upgrade. If the BulkDataLoad files are not present in the ppart file and you run the upgrade, the default BulkDataLoad files will be installed.</td>
</tr>
</tbody>
</table>

**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.

**ePrescribing Module Tasks**

Respond to refill requests

Respond to all refill requests before upgrading. For steps on how to respond to refill requests, see the CGM LYTEC MD Add-ons User’s Guide.

**Administrative Tasks (complete these tasks outside the application)**

Print CGM LYTEC Registration Files

Save or print the registration files for CGM LYTEC Client before you upgrade. To do so

1. On the Help menu in CGM LYTEC Client, click Register Program.
2. Step through the registration screens until you click the Done button.
3. You can then print the Software Registration page or save it to disk.
### Task

**Download your new license files from the eMDs Practice Support website**

**Description**

Download the product license file from the Customer Support Web site.

**To download your license files:**

1. Go to the eMDs Practice Support website at [https://practicesupport.emds.com](https://practicesupport.emds.com).
2. Enter your eMDs Practice Support website username and password.
3. Under **Quick Links** on the left side of the page, click the **Downloads & License Files** link.
4. To download the current (11.0) license file, click the drop-down arrow on the **Download Current Version** button and select **Download License File** from the menu.

If you are already using 11.x, you do not need to download a new license file.

To download the previous (9.5.2) license file, click the drop-down arrow on the **Download Current Version** button and select **Download Previous License** from the menu.

5. The license file will be downloaded immediately to your machine. Click the **Request a license file for installation** link.

**Important:** Make sure to review the Patch Release Notes documents for any necessary database changes. The Patch Release Notes documents are available on Salesforce.
Chapter 5 - CGM LYTEC MD Installation

Pre-installation tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
</table>
| Install your license files | After you download your license files, you must install them.  
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 CGM LYTEC MD. During the install, you will be prompted to browse to the License folder (usually P:\license) where your license files are located.  
If you are changing the number of licensed users, see “Changing the number of licensed users” on page 113. |
| Make sure all users are logged out of all CGM LYTEC MD applications | Make sure all users are logged out of all CGM LYTEC MD 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. |
| Disable User Access Control (UAC) and anti-virus applications | UAC must be disabled. Once it is disabled, reboot the server for the changes to take effect. Below are the steps to disable UAC on Server 2008 Standard.  
1. From the desktop, select Start, and then Control Panel.  
2. Double-click User Accounts and click the link Turn User Account Control on or off.  
3. Clear the Use User Access Control (UAC) to help protect your computer check box.  
4. Click the OK button. |
Make a full backup of your SQL databases

Make a full backup of your SQL database. In the event that the conversion fails, you will need your backup to restore your Practice Partner SQL database.

Restart your server before beginning the installation

CGM LYTEC MD must be installed directly on the server that houses the database. eMDs recommends that you restart your server before beginning the installation.

Shut Down Watchdog

If you have Watchdog installed and running, you must stop it first or it will restart services (such as the PMSI Server) even if you stop them manually. To shut down Watchdog:

1. Check if the green Watchdog icon displays in the System Tray.
2. If so, right click the icon and select **Stop**.
   
   If it does not display in the System Tray, you do not have it installed.

Since Watchdog is no longer supported, eMDs recommends that you leave it disabled.

If your site uses it, uninstall Patient Education.

For steps on how to uninstall Patient Education, see the *CGM LYTEC MD Add-ons Configuration and Installation Guide*.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make a full backup of your SQL databases</td>
<td>Make a full backup of your SQL database. In the event that the conversion fails, you will need your backup to restore your Practice Partner SQL database.</td>
</tr>
<tr>
<td>Restart your server before beginning the installation</td>
<td>CGM LYTEC MD must be installed directly on the server that houses the database. eMDs recommends that you restart your server before beginning the installation.</td>
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</tbody>
</table>
| Shut Down Watchdog | If you have Watchdog installed and running, you must stop it first or it will restart services (such as the PMSI Server) even if you stop them manually. To shut down Watchdog:  
   1. Check if the green Watchdog icon displays in the System Tray.  
   2. If so, right click the icon and select **Stop**.  
      If it does not display in the System Tray, you do not have it installed.  
Since Watchdog is no longer supported, eMDs recommends that you leave it disabled. |
| If your site uses it, uninstall Patient Education. | For steps on how to uninstall Patient Education, see the *CGM LYTEC MD Add-ons Configuration and Installation Guide*. |
# Chapter 5 - CGM LYTEC MD Installation

## Pre-installation tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
</table>
| Shut Down PP Connect  | 1. On the desktop, click the **Exit** button on the Connect-DemSch In screen if it is open. To open this screen, double click the Inbound DemSched icon on the desktop.  

![Figure 24. Connect DemSch In screen](image)  

2. On the desktop, click the **Exit** button on the Connect-BillCode and Sch Out screen if it is open. To open this screen, double click the Outbound BillCode icon on the desktop.  

![Figure 25. Connect BillCode and Sch Out screen](image) |
| Disable MPIC         | On the MPIC Control Panel, click **Stop Service**. Be sure to restart this service after the upgrade is complete. |
Stop the PMSI Data and Application Servers

Stop the PMSI Data Server and PMSI Application Server before installing on the server computer. If you do not stop the service, you will not be able to upgrade successfully.

1. Click **Start** and then **Control Panel**.
2. Click **Performance and Maintenance**.
3. Click **Administrative Tools** and then **Services**.

**NOTE**: depending on your version of the Windows 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.

4. Find PMSI Data Server and right-click.
5. Click **Stop**.
6. Find PMSI Application Server and right-click.
7. Click **Stop**.

Be sure to restart these services after the installation is complete.

If you are already using Practice Partner 11.0 or newer, skip to the step: Check Available Storage Space.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stop the PMSI Data and Application Servers</td>
<td>Stop the PMSI Data Server and PMSI Application Server before installing on the server computer. If you do not stop the service, you will not be able to upgrade successfully.</td>
</tr>
</tbody>
</table>
|   | 1. Click **Start** and then **Control Panel**.  
|   | 2. Click **Performance and Maintenance**.  
|   | 3. Click **Administrative Tools** and then **Services**.  
|   | **NOTE**: depending on your version of the Windows 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.  
|   | 4. Find PMSI Data Server and right-click.  
|   | 5. Click **Stop**.  
|   | 6. Find PMSI Application Server and right-click.  
|   | 7. Click **Stop**.  
|   | Be sure to restart these services after the installation is complete.  

If you are already using Practice Partner 11.0 or newer, skip to the step: Check Available Storage Space.
### Task
Download and run the new **Pre11ConversionFixes.exe** utility.

### Description
Download and run the new **Pre11ConversionFixes.exe** utility. This utility repairs history notes that may cause the upgrade to 11.0 to fail.

**NOTE:** if you are already using 11.0 or newer, skip this step.

This command line utility creates a log file named **Pre11ConversionFixes.log** in the **PPart** folder. This log file indicates how many history notes the utility fixed.

This utility can be run with users in the system, so there is no down time. For most sites that were tested, the utility ran in less than an hour, but depending on the size of your database, database type, and hardware, the run time for this utility can vary from a few minutes to a few days. eMDs recommends that you run this utility during the weekend before your upgrade.

**NOTE:** The issue that the utility fixes should no longer occur with 9.5.2 SP2 sites that are fully patched.

**To run the Pre11ConversionFixes.exe utility:**

1. Download the self-extracting executable from [https://download.practicepartner.com/Pre11ConversionFixes.exe](https://download.practicepartner.com/Pre11ConversionFixes.exe). If you receive a certificate error, opt to download anyway.

2. Click the **Run** button. The system asks where you want to extract the folder. The default location is **C:\McKesson**.

3. Navigate to the extract location, open the **Pre11ConversionFixes** folder, and copy **Pre11ConversionFixes.exe** to your **PPart** folder.

4. You may double-click **Pre11ConversionFixes.exe** to run the utility, but eMDs recommends running the utility at the command prompt in the **PPart** folder so you see the messages on the screen. For example:

```
P:\ppart>pre11conversionfixes.exe
Running pre 11.0 conversion fixes
Number of Past Medical History Notes fixed: 0
Number of Social History Notes fixed: 0
Number of Family History Notes fixed: 0
```

If, like in the example, the utility does not fix any history notes, the **Pre11ConversionFixes.log** file contains only the start time. For example: **Started fixing pre 11 conversion issues on 04/21/2014 at 08:54:22 AM.**
Download and run the new **Pre11DBConnectionCheck.exe** utility. This utility checks and reports any issues with the connection string details that the v11 installer will use to update your system.

**To run the Pre11DBConnectionCheck.exe utility:**

1. Download the self-extracting zip file from [https://download.practicepartner.com/Pre11DBConnectionCheck.exe](https://download.practicepartner.com/Pre11DBConnectionCheck.exe), which contains the **Pre11DBConnectionCheck.exe** utility, Pre11DBConnectionCheck.dll, and Microsoft Visual C++ 2010 redistributable.

2. Click the self-extracting zip file. It extracts by default to **C:\McKesson\Pre11DBConnectionCheck.exe**. Copy the .exe and .dll files to your PPart folder, which usually is **p:\ppart**.

3. Open **C:\McKesson\Pre11DBConnectionCheck.exe** and double-click **vcredist_x86.exe** to install the Microsoft Visual C++ 2010 redistributable, which is required by the utility to run.

4. After the Microsoft Visual C++ 2010 redistributable has finished installing, open your PPart folder and double-click **Pre11DBConnectionCheck.exe**.

5. Click the **Check Database Connection** button to check the database connection details that the v11 installer will use. If there are no issues, a message displays stating that the connection check passed. Otherwise, a message displays stating why the connection check failed. To resolve the connection issue, contact Practice Partner Support before upgrading to release 11.0.

### Task Description

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download and run the new <strong>Pre11DBConnectionCheck.exe</strong> utility</td>
<td>Download and run the new <strong>Pre11DBConnectionCheck.exe</strong> utility. This utility checks and reports any issues with the connection string details that the v11 installer will use to update your system.</td>
</tr>
<tr>
<td>Install and run the PPMT utility</td>
<td>Install and run the PPMT utility for Practice Partner 9.5.2. Running the index defrag scripts that are part of the PPMT utility can prevent a SQL timeout during conversion.</td>
</tr>
<tr>
<td>Check available storage space</td>
<td>The SQL server's drive should have enough storage space for the PP_Small file group. The upgrade can increase the size to two times its original size. To check your storage space usage, you can use SQL Server Management Studio.</td>
</tr>
</tbody>
</table>
## Chapter 5 - CGM LYTEC MD Installation

### Pre-installation tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Change the SQL database recovery mode to Simple</strong></td>
<td>Change the SQL database recovery model before upgrading to Simple. 1. From the SQL Enterprise Manager, click the database name in <strong>DBName</strong> from the <strong>Database</strong> menu. 2. Right-click on Properties, then click <strong>Options</strong>. 3. Select <strong>Simple</strong> from the <strong>Recovery: Model</strong> drop-down list.</td>
</tr>
<tr>
<td><strong>Disable Mirth and stop the Mirth service.</strong></td>
<td>1. If the Mirth Connect Server Manager appears in the System Tray, right-click it and select Close Manager. 2. Click <strong>Start</strong> and then <strong>Control Panel</strong>. 3. Click <strong>Performance and Maintenance</strong>. 4. Click <strong>Administrative Tools</strong> and then <strong>Services</strong>. <strong>NOTE:</strong> depending on your version of the Windows 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 Mirth Connect Service and right-click. 6. Click <strong>Stop</strong>.</td>
</tr>
<tr>
<td><strong>Disable Windows Firewall</strong></td>
<td>1. Click <strong>Start</strong> on the Windows Desktop. 2. Click <strong>Control Panel</strong>. The Control Panel appears. 3. Click <strong>System and Security</strong>. 4. Click <strong>Windows Firewall</strong>. 5. Click <strong>Turn Windows Firewall on or off</strong>. The Customize Settings screen appears. 6. Select the option to turn off Windows Firewall. 7. Click the <strong>OK</strong> button. <strong>NOTE:</strong> Be sure to enable Windows Firewall when the installation is complete.</td>
</tr>
</tbody>
</table>
### Disable DEP (Data Execution Protection)

1. Click **Start** on the Windows Desktop.
2. Click **Control Panel**. The Control Panel appears.
3. Click **System and Security**.
4. Click **System**.
5. Click **Advanced System Settings**.
   - If you are prompted for an administrator password or confirmation, type the password or provide confirmation.
6. Under Performance, click **Settings**.
7. Click the **Data Execution Prevention** tab.
8. Select **Turn on DEP for essential Windows programs and services only**.
9. Click the **OK** button.
10. Click the **OK** button.
11. Close **Control Panel**.

Be sure to enable DEP when the installation is complete.

### 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.

### 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.

### 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.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
</table>
| Disable DEP (Data Execution Protection) | 1. Click **Start** on the Windows Desktop.  
2. Click **Control Panel**. The Control Panel appears.  
3. Click **System and Security**.  
4. Click **System**.  
5. Click **Advanced System Settings**.  
   - If you are prompted for an administrator password or confirmation, type the password or provide confirmation.  
6. Under Performance, click **Settings**.  
7. Click the **Data Execution Prevention** tab.  
8. Select **Turn on DEP for essential Windows programs and services only**.  
9. Click the **OK** button.  
10. Click the **OK** button.  
11. Close **Control Panel**.  
   Be sure to enable DEP when the installation is complete. |
| 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. |
| 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. |
| 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. |
## Chapter 5 - CGM LYTEC MD Installation

### Pre-installation tasks

#### Task

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.

The CheckProviderSPIAndNPI.exe utility performs a check to verify that an SPI associated with a provider is associated with only one practice and that all providers who have an SPI also have an NPI. If either of these checks fails, you will see a list of warning messages indicating the providers you need to fix before you start the migration.

#### 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>`.

```xml
<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.
Server Installation and Setup

You must perform the server installation on a computer with a supported server operating system (Windows Server 2012, Windows Server 2016, or Windows Server 2019) using an administrator account with full privileges.

The installation of CGM LYTEC MD Server could take several hours because your data is being upgraded during the installation. Once the installation has started, do not cancel the installation or you will have to start it over.

Installation

1. Download the ISO for CGM LYTEC MD from the CGM LYTEC and CGM LYTEC MD Download Links page in Support Center.

2. Extract 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 LYTEC.msi. Doing so may result in failure of the installation. Always use autorun.exe.

3. Click Install CGM LYTEC. The CGM LYTEC 2023 Installation – Welcome screen appears.

4. Click the Next button. The End User License Agreement screen appears. Review the terms of the agreement and click I accept the agreement.

5. Click the Next button. The Select Installation Type screen appears. Select the CGM LYTEC MD button.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check the &lt;client&gt; section in the PMSI.interoperability.Service config.</td>
<td>Check the &lt;client&gt; section in the PMSI.interoperability.Service config for the following section:</td>
</tr>
<tr>
<td></td>
<td>&lt;endpoint address=&quot;&quot; binding=&quot;basicHttpBinding&quot; bindingConfiguration=&quot;EPCSServiceBinding&quot; contract=&quot;eMDs.EPCS.IEPCSService&quot; name=&quot;CHServer_EPCSService&quot;/&gt;</td>
</tr>
<tr>
<td></td>
<td>If this section is missing after backing up the file, add the section.</td>
</tr>
</tbody>
</table>

NOTE: Do not upgrade 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 after you have completed the identity proofing and/or DrFirst registration processes.
6. Click the **Next** button. The Select Installation Mode screen appears. Select the **Server** button.

![Select Installation Mode screen](image)

**Figure 26. Select Installation Mode screen**

7. Click the **Next** button. The Select CGM LYTEC Server Components screen appears.
8. Select which options you want to install.

![Select CGM LYTEC Server Components screen](image)

**Figure 27. Select CGM LYTEC Server Components screen**

9. Use the following table to determine which items to select for the clinical component of CGM LYTEC MD.

<table>
<thead>
<tr>
<th>If you are upgrading from...</th>
<th>Perform this action</th>
</tr>
</thead>
<tbody>
<tr>
<td>CGM LYTEC 2014 or earlier</td>
<td>Select the CGM LYTEC MD Server check box.  Select the CGM LYTEC MD Client check box.</td>
</tr>
<tr>
<td>CGM LYTEC 2014 SP1</td>
<td>Clear the CGM LYTEC MD Server check box. Clear the CGM LYTEC MD Client check box.</td>
</tr>
</tbody>
</table>

SQL Server: The database engine used by CGM LYTEC

CGM LYTEC Client: Use this CGM LYTEC software to enter information for your practice.

Crystal Reports: Use this to print and generate reports. You must select this check box for a complete installation of CGM LYTEC.

Predefined Forms: Forms you can use with CGM LYTEC.

CGM LYTECMD Server: This is the software that goes on the server computer to run CGM LYTEC MD. It is ONLY installed during the Server installation.

CGM LYTECMD Client: This is the CGM LYTEC MD program.
10. Use the table to determine which items to select or clear:

<table>
<thead>
<tr>
<th>If you already have the following installed...</th>
<th>Perform this action:</th>
</tr>
</thead>
<tbody>
<tr>
<td>CGM LYTEC Client</td>
<td>Select the CGM LYTEC Client check box.</td>
</tr>
<tr>
<td></td>
<td>Select the Crystal Reports check box.</td>
</tr>
<tr>
<td></td>
<td>Select the Predefined Forms check box.</td>
</tr>
</tbody>
</table>

If you have cleared ALL of the check boxes, stop! You do NOT need to perform a server installation.

11. Select the SQL Server check box.

Depending on your selections, the screens you see will change.

12. Click the Next button. The Select Target Folder screen appears. You will see this screen ONLY if you selected CGM LYTEC Client on the CGM LYTEC Components screen.

13. Click the Next button. The Select Data Folder screen appears. This is the folder where the CGM LYTEC practice data files will be stored on the server.

14. Click the Next button. The SQL Server Setup screen opens.

The SQL instance will default to the existing instance. If, for some reason, you change the instance, you must use this new instance for all future installs.

You must NOT use the following instance names: LYTEC_SQL or PP_SQL.

In addition, if you change the Instance name, the screen will display another field that will allow you to specify the location of the SQL Server files.

If you use MPIC, you MUST use LYTECMD as your instance name.

SQL Server 2017 password requirements:

- The password does not contain all or part of the account name of the user.
- The password is at least eight characters long.
- The password contains characters from three of the following four categories:
  - Latin uppercase letters (A through Z)
  - Latin lowercase letters (a through z)
  - Base 10 digits (0 through 9)
  - Non-alphanumeric characters such as: exclamation point (!), dollar sign ($), number sign (#), or percent (%).
- Passwords can be up to 128 characters long. Use passwords that are as long and complex as possible.

Note the password requirements above. Failure to create a password that meets these requirements WILL cause the installation to fail.
IMPORTANT: For security purposes, eMDs recommends that you change the default shown here to something unique, especially if you have more than one CGM LYTEC server on your network.

15. Click the Next button.

NOTE: If you are installing on a domain controller, a second screen appears at this point.

Enter your domain name and the login and password. By default, the login will appear. To find the domain name for the computer you are installing CGM LYTEC on,

1. Select Start.
2. Right-click on (My) Computer and select Properties.
3. Select the Computer Name tab and the domain name will be listed to the right of Domain. If you do not know the password, contact the Domain Administrator.
4. Click the Next button.

12. Click the Next button. If you changed the name of the Instance, you will see the Data Migration screen. This screen will show you the name of the existing instance and give you the opportunity to decide if you want to migrate the existing CGM LYTEC MD database to the new instance.
   - If you select No, the installer will create a new database and your existing CGM LYTEC MD data will not be used.
   - If you select Yes, your existing CGM LYTEC MD database will be backed up and moved to the new instance.

13. Click the Next button. The Path to License File screen appears. Enter the path on the server to the file (named pplic.txt).

![Path to license file](image)

Figure 28. Practice Partner License screen
14. Click the **Next** button. The PP Server Setup screen appears. Specify the location on the computer where you want the Practice Partner Server to be installed. This must be a server drive and be identified by a letter. The folder name or final sub-folder must be named ppart.

![PP Server Setup](image)

**Figure 29. Practice Partner Server screen**

15. Click the **Next** button. The PP Initial User screen appears. Write down the name and password of the initial user. You will need this information when you first start and log into Practice Partner.

![PP Initial User](image)

**Figure 30. Practice Partner User screen**

Your password must be
- Between 8 and 16 characters in length
- Consist of a combination of letters and at least one number and one non-alphanumeric character.
- Cannot be the same as your user name.

The default value shown to the left is the recommended password.

16. Click the **Next** button. On the PP Database Setup screen, enter the name of the database and a user name and password for the user. This information gives the database a name, user, and password for the Practice Partner database. If you are unsure, leave the defaults for the first two fields and follow the requirements for the password below, make a note of the information.

17. Click the **Next** button.
**WARNING:** If you are running Windows 2012 Server or newer, you must change the default password on this screen. PM$1ADMIN will not work. eMDs recommends PM$1Admin.

Passwords cannot contain the user’s account name or parts of the user’s full name that exceed two consecutive characters.

Passwords must be at least six characters in length.

Passwords must contain characters from three of the following four categories:

- English uppercase characters (A through Z).
- English lowercase characters (a through z).
- Base 10 digits (0 through 9).
- Non-alphabetic characters (for example, !, $, #, %).

If the current database user (PHTECH) password does not meet the new requirements, you will see a dialog box that will allow you to change the password.

You will see this screen only if you selected CGM LYTECMD Server on the Select Components screen.

18. Click the Next button. If you selected Yes to migrate the instance, you will see the PP Data Migration screen. Enter the SA password for the existing instance and then specify the location where you want a backup of the data to be placed.

19. Click the Next button. The Start Installation screen appears. This screen will tell you what type of installation you are actually performing, so what it says may differ from what appears here.

20. Click the Next button. The Installing screen appears and tracks the progress of the install.

21. Install any Add-Ons to CGM LYTEC MD that you want to install. For more information on Add-Ons, see “Add-Ons” on page 77.

22. After you complete your installation of CGM LYTEC MD and install/upgrade any Add-Ons, follow the steps in the next section on “Upgrading CGM LYTEC MD/Practice Partner to release 11.2” on page 59.
Account Registration

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

Figure 32. Account Registration screen

Important: The Customer Account ID is case-sensitive.

Note: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec 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 Lytec.

Recommendation

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData 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 backup. Registration of Lytec 2023 is tied to the server, so if you do not have your Lytec SharedData 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.

For steps to back up your SharedData, see “Important New Backup Information ” on page 7.

Account Registration Process Troubleshooting

If you have verified that you do not have a prior installation of Lytec 2023 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 33. 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:

<table>
<thead>
<tr>
<th>identity.emdscloud.com</th>
<th>eligibilitybenefits.emdscloud.com</th>
</tr>
</thead>
<tbody>
<tr>
<td>licensing.emdscloud.com</td>
<td>ppsmobile.emds.com</td>
</tr>
</tbody>
</table>
In addition, the two below are required if you are using CGM CONNECTION:

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

Lytec Passwords
In Lytec 2022 and newer, Passwords are case sensitive.

Upgrading CGM LYTEC MD/Practice Partner to release 11.2
If you want to upgrade CGM LYTEC MD/Practice Partner to the latest release (11.2), you must first upgrade to release 11.1 by installing all patches and then upgrading to 11.2. Follow these steps:

Install patches to upgrade to 11.1
1. Install ALL of the 2017 patches in order, starting with the 2/2017 cumulative patch, making sure to OMIT the 4/5/2017 client/server patches until there are no more patches left.

   **NOTE:** All of the other pre-2017 patches will be on the list. Do not be alarmed; this is normal.

2. When there are only the 4/5/2017 patches left, install both client/server patches, leaving all the pre-2017 patches uninstalled.

3. Once the Update Manager reboots after installing patches, all of the post-4/5/2017 patches will be available, as you now are pointing to another bucket. You then can install all the remaining patches through current.

   **NOTE:** eMDs recommends that you install the server patches first in order one-by-one post-4/5/2017 patch so that you can verify that the database changes are made without error. The error will be noticeable in the command prompt window but also is recorded in the ppart\ligs\MaintenanceEngine.log text file. If you have an error, contact Technical Support.

4. Once the server has updated, you can accept all other patches together by selecting all.

If you use Appointment Scheduler and/or Medical Billing...
1. Obtain the new patching utility. This utility, called **EnableVersion11_2.exe**, has been created for Appointment Scheduler and/or Medical Billing sites to switch to the new 11.2 patching system.

2. Download the utility from the Support website and save it to your ppart folder.

3. Run the utility from the command prompt to make the switch to the new 11.2 patching system.

   The utility will indicate in the command prompt window if it completed successfully or failed.

If you use Patient Records...
See the instructions for installing eMDs Prescribe: “To upgrade to eMDs Prescribe for CGM LYTEC MD 2022:” on page 65.

Post-Application Server installation tasks
Prior to performing the tasks in this section, be sure you have installed all patches for 11.1. For steps, see “Upgrading CGM LYTEC MD/Practice Partner to release 11.2” on page 59.
After the application server upgrade is complete, perform the following task, if applicable.

<table>
<thead>
<tr>
<th>Post-Installation Task</th>
<th>Description</th>
</tr>
</thead>
</table>
| Run the FixOperatorSwitches utility if the PRUtils setting, **User may set PIN** was selected before the upgrade | If previous to the upgrade, your organization had the PRUtils setting, **User may set PIN** on the Electronic Security screen - Access 1 tab selected, you must run the FixOperatorSwitches utility. The **User may set PIN** setting has been removed in Practice Partner 11.0. Running the utility will ensure that your operators who are also providers can sign prescriptions directly after the upgrade. Before running the utility you must download the utility and save it in your PPart folder. **To download and run the utility:**  
2. Click the Save button. The Save As screen appears.  
3. Browse to the PPart folder.  
4. Click the Save button. The download process begins. After the process is complete, the Download Complete dialog box appears.  
5. Click the Close button.  
6. Open Windows Explorer, and browse to the PPart folder.  
7. Double-click **FixOperatorSwitches.exe**. |

Perform these steps only if you are upgrading from CGM LYTEC 2014 or earlier. Do NOT perform them if you are upgrading from CGM LYTEC 2014 SP1.

**Workstation Installation and Setup**

1. Disable UAC (User Account Control) prior to installing on each workstation. Once it is disabled, you will need to reboot the computer for the changes to take effect. In addition, disable any anti-virus applications prior to installation. Be sure to re-enable both UAC and anti-virus applications after installation.

2. 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 LYTEC.msi. Doing so may result in failure of the installation. Always use autorun.exe.

3. On the CGM LYTEC Installation screen, click **Install CGM LYTEC**. The CGM LYTEC 2023 Installation – Welcome screen appears.
4. Click the **Next** button. The End User License Agreement screen appears. Review the terms of the agreement and click **I accept the agreement**.

5. Click the **Next** button. The Select Installation Type screen appears.

6. Select the **CGM LYTECMD** button and click the **Next** button. The Installation Mode screen appears.

7. Select the **Client** button.

![Select Installation Mode screen](image)

**Figure 34. Select Installation Mode screen**

8. Click the **Next** button. The Select CGM LYTEC Client Components screen appears. Select your components.

9. Select which options you want to install.

![Select CGM LYTEC Client Components screen](image)

**CGM LYTEC Client**: Use this CGM LYTEC software to enter information for your practice.

**Crystal Reports**: Use this reporting program to print and generate reports. You must select this check box for a complete installation of CGM LYTEC.

**Predefined Forms**: Forms you can use with CGM LYTEC.

**CGM LYTECMD Client**: This is the CGM LYTECMD client software.

**Warning**: Ensure that you have selected Predefined Forms. If you leave this check box cleared, existed forms will be deleted during install.
10. Use the following table to determine your selection for CGM LYTEC MD Client.

<table>
<thead>
<tr>
<th>Are you upgrading from CGM LYTEC 2014 or earlier?</th>
<th>CGM LYTEC MD Client check box</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>Cleared</td>
</tr>
<tr>
<td>Yes</td>
<td>Selected</td>
</tr>
</tbody>
</table>

11. Use the table to determine which items to select or clear.

<table>
<thead>
<tr>
<th>If you already have the following installed...</th>
<th>Perform this action:</th>
</tr>
</thead>
<tbody>
<tr>
<td>CGM LYTEC Client</td>
<td>Select the CGM LYTEC Client check box.</td>
</tr>
<tr>
<td></td>
<td>Select the Crystal Reports check box.</td>
</tr>
<tr>
<td></td>
<td>Select the Predefined Forms check box.</td>
</tr>
</tbody>
</table>

Depending on your selections, the procedure below will change.

12. Click the Next button. The Select Target Folder screen appears. eMDs recommends that you use the default program folder location.

13. Click the Next button. The Practice Partner Client screen appears.

![Figure 35. Practice Partner Client screen](image)

Use the Browse button to locate the Practice Partner server files (set up during the Server installation procedure). These files will be on the server computer (typically in P:\ppart). In addition, type in the path where the Practice Partner Client is located. These files will be on the client computer.

14. Click the Next button. The Start Installation screen appears.

15. Click the Next button. Let the installation complete.

16. Install any Add-Ons that you want to install. For more information on Add-Ons, see “Installing Add-Ons” on page 77.

17. After you complete the upgrade of CGM LYTEC MD and any Add-Ons, start CGM LYTEC MD from the Start menu. It will automatically install any patches for the client workstation.

18. Repeat these steps for each workstation on which you want to use CGM LYTEC MD.
Account Registration

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

![Account Registration screen]

Figure 36. Account Registration screen

Important: The Customer Account ID is case-sensitive.

Note: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec 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 Lytec.

Recommendation

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData 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 backup. Registration of Lytec 2023 is tied to the server, so if you do not have your Lytec SharedData 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.

Account Registration Process Troubleshooting

If you have verified that you do not have a prior installation of Lytec 2023 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:

![Error message]

Figure 37. 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:

<table>
<thead>
<tr>
<th>identity.emdscloud.com</th>
<th>eligibilitybenefits.emdscloud.com</th>
</tr>
</thead>
<tbody>
<tr>
<td>licensing.emdscloud.com</td>
<td>ppsmobile.emds.com</td>
</tr>
<tr>
<td>terminology.emdscloud.com</td>
<td>api.emdscloud.com</td>
</tr>
</tbody>
</table>
In addition, the two below are required if you are using CGM CONNECTION:
https://cnx.cgmus.com/
https://cnx-mh.cgmus.com/

**Lytec Passwords**
In Lytec 2022 and newer, Passwords are case sensitive.

### Upgrading to eMDs Prescribe

This section lists the steps you must complete to upgrade to eMDs Prescribe for CGM LYTEC MD 2022/Practice Partner 11.2.
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.

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 new system.

![Migration Readiness Assessment](image)

**Figure 38. Migration Readiness Assessment**

**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 CGM LYTEC MD 2022:

Complete the following steps to upgrade to eMDs Prescribe for CGM LYTEC MD 2022.
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:

<table>
<thead>
<tr>
<th>Check off when complete</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>__________</td>
<td>Approve or deny all refill requests for all providers.</td>
</tr>
<tr>
<td>__________</td>
<td>Back up your CGM LYTEC MD database and PPart folders.</td>
</tr>
<tr>
<td>__________</td>
<td>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.</td>
</tr>
<tr>
<td>__________</td>
<td>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.</td>
</tr>
<tr>
<td>__________</td>
<td>Ensure that you are up to date on all patches.</td>
</tr>
<tr>
<td>__________</td>
<td>Ensure that the following URLs are added to your trusted sites: <a href="https://microservice.emds.com/">https://microservice.emds.com/</a> <a href="https://erx.emdscloud.com">https://erx.emdscloud.com</a></td>
</tr>
</tbody>
</table>

3. Double-click MigrateToEmdsRx.exe. The Migrate to eMDs Prescribing screen appears.

![Figure 39. Migrate to eMDs Prescribing screen](image-url)
4. Select the **Migrate to eMDs ePrescribing** option, select all check boxes at the bottom of the screen, and click the **OK** button.

<table>
<thead>
<tr>
<th>If the utility...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>completes successfully</td>
<td>the Launch the Software Update screen appears.</td>
</tr>
<tr>
<td>fails to complete</td>
<td>return to the Migrate to eMDs Rx screen, select the <strong>Roll back a failed migration</strong> option, and click the <strong>OK</strong> button so that you can continue to use electronic prescribing. When you are ready to run the migration again, start at step 2.</td>
</tr>
</tbody>
</table>

![Launch the Software Update](image)

*Figure 40. Launch the Software Update screen*

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

![Product Update Manager](image)

*Figure 41. Product Update Manager screen*

6. Select all patches and download and install them.

   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. After the complete system restore, run the MigrateToEmdsRx.exe utility rollback option so that you can ePrescribe on the old system. 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.

7. Access Patient Records to activate with eMDs Prescribe.

   ![External Systems screen](image)

   Figure 42. External Systems screen
b. Select the **Activation Keys** row and click the **Edit** button. The Activation Configuration screen appears.

![Activation Configuration screen](image)

Figure 43. 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.


9. Run the **RegisterWithEmdsRX.exe** utility from the **PPart** folder. This utility will download your prescriber demographic data. If there are any mismatches between the data and what is stored in eMDs Prescribe, you must resolve the issues. (If you currently are not using e-Prescribing or are a new customer, you can skip this step since there will be no data to reconcile.)

10. Once the data is reconciled, click the **Register** button to register the customer and sync the information in the CGM LYTEC MD EHR system with the data.

11. When the utility completes successfully, you are ready to start using eMDs Prescribe.
Transferring data to the new system

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

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

![Register Customer screen](image)

*Figure 44. Register Customer screen*

2. Click the **Next** button. The Register With eMDs Prescribe screen appears.

![Register With eMDs Prescribe screen](image)

*Figure 45. Register With eMDs Prescribe 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 CGM LYTEC MD 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.

![Surescripts Practices screen](image1)

Figure 46. Surescripts Practices screen

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

![Practice Reconciliation screen](image2)

Figure 47. Practice Reconciliation screen
The following table describes the grids/fields on this screen.

<table>
<thead>
<tr>
<th>Grid/field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surescripts Properties</td>
<td>This grid displays the demographic data associated with the practice in Surescripts.</td>
</tr>
<tr>
<td>Local Properties</td>
<td>This grid displays the demographic data of the practice in CGM LYTEC MD.</td>
</tr>
<tr>
<td>Selected Surescripts Property</td>
<td>This field displays the value that currently is selected in the Surescripts Properties grid.</td>
</tr>
<tr>
<td>Available Local Properties</td>
<td>This field displays each Local Properties value that is available to transfer the Surescripts data to replace in CGM LYTEC MD.</td>
</tr>
</tbody>
</table>

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 CGM LYTEC MD 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 48. Surescripts Prescribers screen](image)

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

![Figure 49. Prescriber Reconciliation screen](image)
The following table describes the grids/fields on this screen.

<table>
<thead>
<tr>
<th>Grid/field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surescripts Properties</td>
<td>This grid displays the demographic data associated with the prescriber in Surescripts.</td>
</tr>
<tr>
<td>Local Properties</td>
<td>This grid displays the demographic data of the provider in CGM LYTEC MD.</td>
</tr>
<tr>
<td>Selected Surescripts Property</td>
<td>This field displays the value that currently is selected in the Surescripts Properties grid.</td>
</tr>
<tr>
<td>Available Local Properties</td>
<td>This field displays each Local Properties field that is available to transfer the Surescripts data to replace in CGM LYTEC MD.</td>
</tr>
</tbody>
</table>

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.

![Register With eMDs Rx screen](image1.png)

**Figure 50. Register With eMDs Rx screen**

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

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

![Register Organizations for eMDs Rx screen](image2.png)

**Figure 51. 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.

![Prescriber Migration screen](image1)

*Figure 52. Prescriber Migration screen*

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

![Prescriber Migration screen](image2)

*Figure 53. 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 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.

![One or more prescribers failed to migrate](image1)

**Figure 54. ‘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 CGM LYTEC MD 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.

![One or more prescribers failed to migrate](image2)

**Figure 55. ‘One or more prescribers failed to migrate’ error message**
17. Click the **Next** button. The Pharmacy Migration screen appears and displays the number of custom pharmacies associated with patients in CGM LYTEC MD.

![Pharmacy Migration screen](image)

**Figure 56. Pharmacy Migration screen**

18. Click the **Migrate Pharmacies** button to migrate the custom pharmacies. 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.

![Pharmacy Migration screen](image)

**Figure 57. Pharmacy Migration screen**
19. Click the **Close** button. The Migration Activity Report appears.

![Migration Activity Report](image)

*Figure 58. Migration Activity Report*

20. 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.
Chapter 6 - Post Installation Setup

**Important:** Make sure to review the Patch Release Notes documents for any necessary database changes. The Patch Release Notes documents are available on Salesforce.

Specifying the Default SQL Server Credentials

After you have installed CGM LYTEC, you will need to specify the default SQL credentials. CGM LYTEC no longer installs or controls the SQL instance. Instead, it uses an existing one by being given the credentials to the instance.

1. Start CGM LYTEC. The Specify Default SQL Credentials screen appears.

   ![Specify Default SQL Credentials screen](image)

   *Figure 59. Specify Default SQL Credentials screen*

   2. Select the server and instance name that was specified in the SQL Server Setup step during installation. The default Username is **sa**.

      If you use MPIC, you MUST use LYTECMD as your instance name.

   3. Click the **OK** button.

   4. Go to the next section, “Converting data from previous versions of CGM LYTEC” on page 82.
Converting data from previous versions of CGM LYTEC

Migrating existing databases

NOTE: if you are upgrading from CGM LYTEC 2011 or above, you will not have to migrate your database(s). This procedure was performed in an earlier installation.

CGM LYTEC has an updated use of SQL in which it no longer controls the SQL instance on the computer, allowing other programs to use the instance as well. CGM LYTEC now simply is given the SQL instance credentials and uses them. Because of this, it is necessary to migrate CGM LYTEC databases to the new instance as part of the process of installation and conversion.

NOTE: Run this utility only on the server computer.

Once you have CGM LYTEC installed, you will be prompted to migrate your databases when you first start CGM LYTEC. The program will look for the old LYTEC_SQL instance. If it finds this instance, it will trigger the Database Migration wizard. In addition, there is also an option on the main application menu that you can use to manually start the wizard.

![Figure 60. Open Practice screen](image-url)

Figure 60. Open Practice screen
When you click this option, CGM LYTEC will check for a LEGACY_SQL instance and check if any legacy practices exist. If so, the Database Migration wizard will start. Use the Migrate Legacy Databases screen to select the databases that you want to migrate to the new SQL instance.

![Migrate Legacy Databases screen](image)

Figure 61. Migrate Legacy Databases screen

Once you have made your selections, click the **Migrate** button. A progress bar will show you the progress of the migration. When the process is complete, click the **OK** button.

When the databases have been migrated, you can continue with the conversion of your practices.

**Converting practices**

This procedure applies to users converting data from earlier versions of CGM LYTEC to 2023 on the same operating system; that is, you are installing on the same operating system as the previous version.

1. After you have migrated your databases to the new SQL instance (if needed), click the **CGM LYTEC** button and select **Open Practice**. The Practice List screen opens.
2. Click **Browse**. Select the practice you want to convert.
3. Click **Open Practice**. The Converting Data Files screen appears.
4. Click the **Yes** button. The Log In screen appears.
5. On the User Code and Password fields, enter the information for the practice.
6. Click the **OK** button. The Conversion Backup screen appears.
7. Click the **OK** button. The Backup Type screen appears.
8. Select the **Backup Database** button and click the **Next** button.
9. Click the **Backup File** button to navigate to a location for storing the backup. Use the Folders drop down list to further select a location and enter a file name in the Selected File field.
10. Click the **OK** button.
11. Click the **Next** button.
12. Click the **Next** button on the Backup Options screen.
13. Click the **Next** button on the Backup Media screen.
14. Click the **Finish** button on the Backup SQL Preview screen. The backup utility runs and the Database Interface screen appears.
15. Click the **OK** button. Conversion continues.
16. When the conversion is complete, the Error Log screen appears.
17. Click the **OK** button. The Log In screen appears. Enter the user code and password from the practice.
18. Click the **OK** button. The converted practice opens.

**Post installation for users of CGM LYTEC MD**

**NOTE:** If you are upgrading from CGM LYTEC MD 2014 SP1 or newer, you do NOT need to perform these steps.

**Upgrade the PPMT Utility for Practice Partner 11.0**

A new version of the PPMT Utility is available for Practice Partner 11.0. You must obtain the Practice Partner 11.0 PPMT utility files and upgrade the utility before it can be used for 11.0.

**Past Medical History, Family History, and Social History - legacy data and default titles**

After you upgrade to CGM LYTEC MD 2023, you will have untitled data in the Past Medical History, Family History, and Social History sections of the patient chart. Therefore, the data in each of these sections needs a default note title. The default note titles are: **Past Medical History**, **Family History**, and **Social History**.

When you use Dot codes .IPH, .ISH, and .IFH in a template without a title parameter, the Dot code will insert the most recent note with the default note title. See the following table for examples.

<table>
<thead>
<tr>
<th>If a chart contains a legacy Past Medical History note and...</th>
<th>Then Dot code .IPH (without a title parameter) will insert the...</th>
</tr>
</thead>
<tbody>
<tr>
<td>an additional note with a different title</td>
<td>legacy Past Medical History note.</td>
</tr>
<tr>
<td>another note in the Past Medical History chart section titled Cardiology History</td>
<td>legacy Past Medical History note.</td>
</tr>
<tr>
<td>a note titled Cardiology History and a more recent note titled Past Medical History</td>
<td>most recent note titled Past Medical History.</td>
</tr>
</tbody>
</table>

**Post-installation ICD-10 checklist**

After upgrading to CGM LYTEC MD 2023, eMDs recommends updating all areas of CGM LYTEC MD which use ICD codes (for example, your existing templates, orders, active patient problems, etc). Use the following checklist to ensure that you update all affected areas.

If you subscribe to Clinical Tools, eMDs-supplied Templates and QuickText will be updated automatically with ICD-10 codes when you install the next Clinical Tools - Clinical Templates update. If you do not subscribe to Clinical Tools or your organization uses custom Templates and/or QuickText, you can update these manually using Template and QuickText Maintenance. If you customized any of the eMDs-supplied Templates and/or QuickText but did not change the name to a unique name, eMDs recommends renaming your Templates and QuickText before running the Clinical Templates update. The install will overwrite eMDs-supplied Templates and QuickText.
Carrier Maintenance

The Carrier Maintenance is set up to start using ICD-10 by the date of 10/1/14. You may change the default to ICD-9 if the carrier is not ready for ICD-10 by the October 1 date. Select Maintenance > Tables > Insurance Carriers > select the carrier > Edit > General Tab 1 Diagnosis Coding. There is a drop-down for ICD-9, ICD-10, or Default (ICD-10 after 10/1/14).

<table>
<thead>
<tr>
<th>Step</th>
<th>System Area</th>
<th>Procedural Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Update Diagnosis Codes</td>
<td><strong>To update diagnosis codes:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. Select Maintenance &gt; Tables &gt; Diagnosis Codes.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Select the code &gt; Edit.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Click the Advance Code Search button (best to search by name).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Select the appropriate ICD-10 &gt; OK.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>You will see the table now has both ICD 9 and 10, along with SNOMED.</td>
</tr>
<tr>
<td>2</td>
<td>Health Maintenance</td>
<td><strong>To run the Age Health Maintenance Templates utility:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Prerequisite: Backup your data before running the utility.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. Select Maintenance &gt; Utilities &gt; Health Maintenance Utilities &gt; Age Health Maintenance Templates.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. A message asks you whether your data is backed up.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- To confirm, click the Yes button.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- If you have not yet backed up your data, click the No button to exit.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. When the utility has finished running, a confirmation message appears. Click the OK button.</td>
</tr>
<tr>
<td>3</td>
<td>Forms</td>
<td><strong>To run the Import New Form Items utility:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. Back up your Medical Billing database.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. In Medical Billing, select Maintenance &gt; Utilities &gt; Import New Form Items. The Add Form Items screen appears.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Click the OK button.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Log off and restart Medical Billing.</td>
</tr>
</tbody>
</table>
Prescription Templates

- Update prescription templates with indications
  *(eMDs recommends updating your 50 most commonly used templates)*

- In the patients chart all medications will need to be updated prior to refilling by eRx. Edit the medication to populate the NDC or the ePrescription will not send.

To edit Prescription templates:


2. Select the prescription template that you want to edit.

3. Click the Edit button. The Prescription Template <Edit> screen appears.

4. Click the Indications button. The Indications for Rx Template for Universal Provider screen appears.

5. Delete all existing indications (using the Delete button). Before deleting indications, eMDs recommends keeping a record of the indications. The next step requires adding the deleted indications.

6. Click the New button. The Diagnosis Select screen appears.

7. Search for and select the diagnosis or problem you want to add as an indication.

8. On the Indication for Rx Template screen, indicate the Rx Type and optionally enter a message.

9. Click the OK button.

10. Repeat steps 6 - 9 until you have added all indications for the prescription template.
QuickText and QuickText Pick Lists

1. Identify your most commonly-used diagnosis codes (approximately 25-50 codes)
2. Update disease and new problems (the average list is over 100)
3. Update chronic disease diagnoses
4. Update custom (added by your organization) QuickText and pick lists. Start with the most commonly-used diagnoses; however, eventually you must update all custom QuickText.

If you subscribe to Clinical Tools, eMDs-supplied QuickText for all .MP, DX, and .OP Dot codes will be updated automatically when you install the next Clinical Tools - Clinical Templates update.

To edit QuickText and QuickText pick lists:

1. In Patient Records, select Maintenance > Tables > QuickText. The QuickText Maintenance screen appears.
2. Keep the Regular option button selected.
3. Select the QuickText or QuickText pick list that you want to edit.
4. Click the Edit button. The Edit QuickText screen appears.
5. Delete the existing QuickText in the text box.
6. Click the Lookup button. The Diagnosis Code Select screen appears.
7. Search for and select the diagnosis or problem previously entered for the QuickText. The selected concept will appear in the text box on the Edit QuickText screen.
8. Click the Save button.
9. Repeat steps 3 - 9 until you have updated all QuickText and pick lists.
### Progress Notes (with diagnosis codes)

1. Update your custom progress note templates
2. Update progress note templates by specialty (the average is between 10 and 50 templates)

### To edit note templates:

1. In Patient Records, select Maintenance > **Note Templates**. The Provider/Practice Selection screen appears.
2. Select the provider or practice whose templates you want to edit, or leave the Provider ID and Practice ID fields blank to add a universal template.
3. Click the **OK** button. The Note Template Lookup screen appears.
4. Select the template you want to edit.
5. Click the **OK** button. The Note Templates screen appears.
6. Click the **Edit** button.
7. Delete the template's existing Dot code lines and replace them with the new triad set (ICD-10, ICD-9, and SNOMED codes) using the Diagnosis Code Select screen.
   a. Click the **Pb/Dx** button. The Diagnosis Code Select screen appears.
   b. Search for and select the diagnosis or problem you want to include in the template.
   c. Click the **OK** button. The triad code set is inserted into the template.
8. Click the **Save** button.
9. Click the **Close** button. The Note Template Lookup screen appears.
10. Repeat steps 4 - 9 until you have updated all note templates.
Conditional Logic

1. Check all progress note templates (starting with the most commonly used first).
2. Update Letter templates (the average is between 10 and 25 templates)
3. Update Past Medical History, Social History, and Family History templates
4. Update your patients’ history (Past Medical, Social, and Family)

To edit note templates:

1. In Patient Records, select Maintenance > Note Templates. The Provider/Practice Selection screen appears.
2. Select the provider or practice whose templates you want to edit, or leave the Provider ID and Practice ID fields blank to add a universal template.
3. Click the OK button. The Note Template Lookup screen appears.
4. Select the template you want to edit.
5. Click the OK button. The Note Templates screen appears.
6. Click the Edit button.
7. Delete the template's existing Dot code lines and replace them with the new triad set (ICD-10, ICD-9, and SNOMED codes) using the Diagnosis Code Select screen.
   a. Click the Pb/Dx button. The Diagnosis Code Select screen appears.
   b. Search for and select the diagnosis or problem you want to include in the template.
   c. Click the OK button. The triad code set is inserted into the template.
8. Click the Save button.
9. Click the Close button. The Note Template Lookup screen appears.
10. Repeat steps 4 - 9 until you have updated all note templates.
To edit letter templates:
1. In Patient Records, Select Maintenance > Templates > Letter Templates. The Provider/Practice Selection screen appears.
2. Select the provider or practice whose templates you want to edit, or leave the Provider ID and Practice ID fields blank to add a universal template. The Letter Template Lookup screen appears.
3. Select the template that you want to edit.
4. Click the OK button. The Letter Templates screen appears.
5. Click the Edit button.
6. Delete the template’s existing Dot code lines and replace them with the new triad set (ICD-10, ICD-9, and SNOMED codes) using the Diagnosis Code Select screen.
   a. Click the Pb/Dx button. The Diagnosis Code Select screen appears.
   b. Search for and select the diagnosis or problem you want to include in the template.
   c. Click the OK button. The triad code set is inserted into the template.
7. Click the Save button.
8. Click the Close button. The Letter Template Lookup screen appears.
9. Repeat steps 3 - 8 until you have updated all note templates.

To edit Past Medical History, Social History, and Family History templates:
1. In Patient Records, select Maintenance > Templates and then select one of the following options:
   - Past Medical History Templates
   - Social History Templates
   - Family History Templates
   The Provider/Practice Selection screen appears.
2. Select the provider or practice whose templates you want to edit, or leave the Provider ID and Practice ID fields blank to add a universal template. The Lookup screen appears.

3. Select the template that you want to edit.

4. Click the OK button. The Note Templates screen appears.

5. Click the Edit button.

6. Delete the template’s existing Dot code lines and replace them with the new triad set (ICD-10, ICD-9, and SNOMED codes) using the Diagnosis Code Select screen.
   a. Click the Pb/Dx button. The Diagnosis Code Select screen appears.
   b. Search for and select the diagnosis or problem you want to include in the template.
   c. Click the OK button. The triad code set is inserted into the template.

7. Click the Save button.

8. Click the Close button. The Lookup screen appears.

9. Repeat steps 3 - 8 until you have updated all your Past Medical History, Social History, and Family History templates.

To update a patient’s history:
1. Open a patient’s chart.

2. Click one of the following tabs:
   - Past Medical History
   - Social History
   - Family History

3. The Past Medical History, Social History, or Family History screen appears.

4. Select the note you want to edit (using the Older and Newer buttons).

5. Click the Edit button.

6. Delete the note’s existing Dot code lines and replace them with the new triad set (ICD-10, ICD-9, and SNOMED codes) using the Diagnosis Code Select screen.
<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>
|   | a. Click the **Pb/Dx** button. The Diagnosis Code Select screen appears.  
   b. Search for and select the diagnosis or problem you want to replace.  
   c. Click the **OK** button. The triad code set is inserted into the template.  
   7. Click the **Save** button.  
   8. Repeat these steps until you have updated all your patients’ Past Medical History, Social History, and Family History notes. |   |
| 8 | **Problem List**  
   • Update Major Problem, Other Problem, and Diagnosis lists | For procedural steps, see “Updating existing patient problem lists with ICD-10 and SNOMED codes” on page 97. |
### Advance Beneficiary Notice (ABN) trigger with ICD code

- Update existing orders associated with ABN / Insurance before **10/01/2014**

### To update order names:

1. Select Maintenance > Templates > Order Templates > **Order Names**. The Order Names Select screen appears.
2. Select the order name that you want to edit.
3. Click the **Edit** button. The Order Name <Edit> screen appears.
4. Click the **Insurance** button. The Order Insurance screen appears.
5. Click the **Codes** button. The Carrier-Specific Diagnosis Codes screen appears.
6. Select the Dx Code that you want to update.
7. Click the **Edit** button. The Carrier-Specific Diagnosis Codes <Edit> screen appears.
8. Click the **Carrier-Specific Diagnosis Code** down-arrow button. The Diagnosis Code Select screen appears.
9. Search for and select the diagnosis you want to replace.
10. Click the **OK** button. The ICD-10 appears in the **Carrier-Specific Diagnosis Code** field.
11. Click the **OK** button to close the screen.
12. Repeat steps 6 - 11 until you have updated all diagnosis codes.
13. Click the **Close** button to close the Carrier-Specific Diagnosis Codes screen.
14. Click the **Close** button to close the Order Insurance screen.
15. Click **OK** to save your changes and close the Order Name <Edit> screen. The Order Names Select screen appears.
16. Repeat steps 2 - 15 until you have updated all order names associated with ABN/Insurance.
<table>
<thead>
<tr>
<th>Orders</th>
<th>To edit order QuickText:</th>
</tr>
</thead>
</table>
| • Update any order that has an ICD code linked to it (the average is between 50 and 100 orders)  
• Update note templates that include the .OR3 Dot code | 1. In Patient Records, select Maintenance > Tables > QuickText. The QuickText Maintenance screen appears. |
| | 2. Keep the Regular option button selected. |
| | 3. Enter ORDER in the QuickText Name field. |
| | 4. Select the QuickText that you want to edit. |
| | 5. Click the Edit button. The Edit QuickText screen appears. |
| | 6. Delete the existing QuickText in the text box. |
| | 7. Click the Lookup button. The Diagnosis Code Select screen appears. |
| | 8. Search for and select the diagnosis or problem previously entered for the QuickText. The selected concept will appear in the text box on the Edit QuickText screen. |
| | 9. Click the Save button. |
| | 10. Repeat steps 4-9 until you have updated all order QuickText. |

<p>| To edit note templates with .OR3 Dot codes: | |
| | 1. In Patient Records, select Maintenance &gt; Note Templates. The Provider/Practice Selection screen appears. |
| | 2. Select the provider or practice whose templates you want to edit, or leave the Provider ID and Practice ID fields blank to add a universal template. |
| | 3. Click the OK button. The Note Template Lookup screen appears. |
| | 4. Select the template you want to edit. |
| | 5. Click the OK button. The Note Templates screen appears. |
| | 6. Click the Edit button. |
| | 7. Find the .OR3 Dot code line(s) and replace the diagnosis codes with the new triad set (ICD-10, ICD-9, and SNOMED codes) using the Diagnosis Code Select screen. |
| | a. Click the Pb/Dx button. The Diagnosis Code Select screen appears. |
| | b. Search for and select the diagnosis or problem you want to replace in the template. |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
</table>
| c. Click the **OK** button. The triad code set is inserted into the template. | 8. Click the **Save** button.  
9. Click the **Close** button. The Note Template Lookup screen appears.  
10. Repeat steps 4 - 9 until you have updated all note templates. |
| 11 | **Electronic Encounter Form (EEF) Templates**  
• Update EEF templates added by name (specialty or practice) | **To edit EEF templates:**  
1. In Patient Records, select Maintenance > Templates > Electronic Encounter Form Templates > **Electronic Encounter Templates**. The Electronic Encounter Template Select screen appears.  
2. Select the template that you want to edit.  
3. Click the **Edit** button. The Electronic Encounter Template <Edit> screen appears.  
4. Click the **Diagnosis Codes** tab.  
5. Remove all diagnosis codes in the Diagnosis Codes list. Before removing any diagnosis codes, eMDs recommends keeping a record of the codes. The next step requires adding the deleted codes.  
6. Add the diagnosis codes (with the new triad set) to the **Diagnosis Codes** tab.  
7. Click the **OK** button. The Electronic Encounter Template Select screen appears.  
8. Repeat steps 2-7 until you have updated all your templates.  
|
Chapter 6 - Post Installation Setup

Prenatal

1. Update Pregnancy problems (in the Problems/Procedures screen - Major Problems tab)
2. Update Prenatal templates

To edit prenatal templates:

1. In Patient Records, select Maintenance > Templates > Health Maintenance Templates. The Provider/Practice Selection screen appears.
2. Select the provider or practice whose templates you want to edit, or leave the Provider ID and Practice ID fields blank to add a universal template. The Health Maintenance Templates screen appears.
3. Select the Pregnancy option button.
4. Select the template you want to edit in the list.
5. Click the Edit button. The Health Maintenance Template <Edit> screen appears.
6. Click the Lookup button. The Diagnosis Code Select screen appears.
7. Search for and select the diagnosis or problem you want to add to the template.
8. Click the OK button. The Health Maintenance Template <Edit> screen appears and the Pregnancy/Problem field is updated with the selected diagnosis or problem.
9. Click the OK button. The Health Maintenance Templates screen appears.
10. Repeat steps 3 - 9 until you have updated all prenatal templates.

Updating existing patient problem lists with ICD-10 and SNOMED codes

To prevent providers from having to manually update and add ICD-10 and SNOMED codes to existing active patient problems one at a time, eMDs provides new functionality that is available from the Diagnosis Code Maintenance <New> and <Edit> screens.

See “List of common ICD-9 codes for Family Practice” on page 100 for a list of common ICD-9 codes (used primarily by Family Practice) and their associated ICD-10 and SNOMED codes. Use this list as a reference to update your site’s patient problem lists that contain these active problems/ICD-9 codes with the new ICD-10 and SNOMED codes. You also may choose to update additional problems/ICD-9 codes that are not on the list, and you must do so using the maintenance table, one at a time.
To update with ICD-10 and SNOMED codes the active problems/diagnoses on all existing patient problem lists that use the ICD-9 code you are about to edit, complete the steps in the following table.

<table>
<thead>
<tr>
<th>Did you modify the eMDs-supplied office codes in your previous release of CGM LYTEC MD?</th>
<th>Then complete the following steps to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>update existing records by adding the associated ICD-10 and SNOMED codes.</td>
</tr>
<tr>
<td>1. From the Diagnosis Codes maintenance table, select the record that you want to edit.</td>
<td></td>
</tr>
<tr>
<td>3. Search for and select the appropriate code combination, ensuring that you select a combination that includes the ICD-9 code you are editing. Click the OK button. The system updates the Diagnosis Code &lt;Edit&gt; screen with the selected information.</td>
<td></td>
</tr>
<tr>
<td>4. Click the OK button. The following new warning message displays:</td>
<td></td>
</tr>
<tr>
<td>This change will result in an immediate update of the codes for all patients with this active problem on their problem list(s), in addition to any other areas in the product where this office code is used. Do you still want to proceed?</td>
<td></td>
</tr>
<tr>
<td>5. Click the Yes button to save the changes. The system will not change the existing problem descriptions on the patients’ problem lists, but it will update the description for new problems.</td>
<td></td>
</tr>
<tr>
<td>Click the No button to close the screen without saving the changes.</td>
<td></td>
</tr>
<tr>
<td>If you access an active problem from the problem list that contains the ICD-9 code you just edited, you will see the newly-added ICD-10 and SNOMED codes.</td>
<td></td>
</tr>
<tr>
<td>Did you modify the eMDs-supplied office codes in your previous release of CGM LYTEC MD?</td>
<td>Then complete the following steps to...</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
</tbody>
</table>
| Yes | map your existing office code to a new, valid office code and add the associated ICD-10 and SNOMED codes.  
1. From the Diagnosis Codes maintenance table, select the record that you want to edit.  

**NOTE**: If you attempt to complete these steps from a tab other than the Diagnosis Code Mapping tab, the following new warning message displays:  
Unable to write record to data base. Please try a different combination of values.  

3. Click the Advanced Code Search button. The Diagnosis Code Select screen appears.  
4. Search for and select the appropriate code combination, ensuring that you select a combination that includes the ICD-9 code in the record that you are editing. Click the OK button. The system updates the Diagnosis Code <Edit> screen with the selected information.  
5. Click the OK button. The following new warning message displays:  
This combination of ICD9, ICD10, and SNOMED codes is already in use. Would you like to update all active problems using <old office code> to use <new office code>?  
This will affect all active problems that use the code <old office code>.  
This process may take a long time.  

Yes (continued) | 6. Click the Yes button to save the changes. The system will update the patients’ problem lists with the new codes, but it will not update the problem descriptions. Also note that the Diagnosis Code Maintenance <Edit> screen will not be updated; the previous office code continues to display in the both Office Code fields.  
Click the No button to close the screen without saving the changes.  

List of common ICD-9 codes for Family Practice

The following table lists ICD-9 codes that are commonly used by Family Practice. The list includes the associated ICD-10 and SNOMED codes that your site may choose to add to existing records.

<table>
<thead>
<tr>
<th>ICD-9 Code/Description</th>
<th>ICD-10 Code/Description</th>
<th>SNOMED Code/Description</th>
<th>Provider-Friendly Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>465.9/Acute upper respiratory infections of unspecified site</td>
<td>J06.9/Acute upper respiratory infection, unspecified</td>
<td>54398005/Acute upper respiratory infection</td>
<td>Acute upper respiratory infection</td>
</tr>
<tr>
<td>401.9/Unspecified essential hypertension</td>
<td>I10/Essential (primary) hypertension</td>
<td>59621000/Essential hypertension</td>
<td>Essential (primary) hypertension</td>
</tr>
<tr>
<td>401.1/Benign essential hypertension</td>
<td>I10/Essential (primary) hypertension</td>
<td>1201005/Benign essential hypertension</td>
<td>Benign essential hypertension</td>
</tr>
<tr>
<td>272.4/Other and unspecified hyperlipidemia</td>
<td>E78.5/Hyperlipidemia, unspecified</td>
<td>55822004/Hyperlipidemia</td>
<td>Hyperlipidemia</td>
</tr>
<tr>
<td>466.0/Acute bronchitis</td>
<td>J20.9/Acute bronchitis, unspecified</td>
<td>10509002/Acute bronchitis</td>
<td>Acute bronchitis</td>
</tr>
<tr>
<td>250.00/Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled</td>
<td>E11.9/Type 2 diabetes mellitus without complications</td>
<td>44054006/Diabetes mellitus type 2</td>
<td>Type 2 diabetes</td>
</tr>
<tr>
<td>250.01/Diabetes mellitus without mention of complication, type I (juvenile type), not stated as uncontrolled</td>
<td>E10.9/Type 1 diabetes mellitus without complications</td>
<td>46635009/Diabetes mellitus type 1</td>
<td>Type 1 diabetes</td>
</tr>
<tr>
<td>250.02/Diabetes mellitus without mention of complication, type II or unspecified type, uncontrolled</td>
<td>E11.65/Type 2 diabetes mellitus with hyperglycemia</td>
<td>443694000/Type II diabetes mellitus uncontrolled</td>
<td>Uncontrolled Type 2 diabetes mellitus</td>
</tr>
<tr>
<td>250.03/Diabetes mellitus without mention of complication, type I (juvenile type), uncontrolled</td>
<td>E10.65/Type 1 diabetes mellitus with hyperglycemia</td>
<td>444073006/Type I diabetes mellitus uncontrolled</td>
<td>Uncontrolled Type 1 diabetes mellitus</td>
</tr>
<tr>
<td>461.9/Acute sinusitis, unspecified</td>
<td>J01.90/Acute sinusitis, unspecified</td>
<td>15805002/Acute sinusitis</td>
<td>Acute sinusitis, unspecified</td>
</tr>
<tr>
<td>789.00/Abdominal pain, unspecified site</td>
<td>R10.9/Unspecified abdominal pain</td>
<td>21522001/Abdominal pain</td>
<td>Abdominal pain</td>
</tr>
<tr>
<td>ICD-9 Code/Description</td>
<td>ICD-10 Code/Description</td>
<td>SNOMED Code/Description</td>
<td>Provider-Friendly Description</td>
</tr>
<tr>
<td>-----------------------------------------------------------</td>
<td>-----------------------------------------</td>
<td>-------------------------------------------------------------</td>
<td>--------------------------------------------</td>
</tr>
<tr>
<td>244.9/Unspecified hypothyroidism</td>
<td>E03.9/Hypothyroidism, unspecified</td>
<td>40930008/Hypothyroidism</td>
<td>Hypothyroidism</td>
</tr>
<tr>
<td>462/Acute pharyngitis</td>
<td>J02.9/Acute pharyngitis, unspecified</td>
<td>363746003/Acute pharyngitis</td>
<td>Acute pharyngitis</td>
</tr>
<tr>
<td>724.2/Lumbago</td>
<td>M54.5/Low back pain</td>
<td>279039007/Low back pain</td>
<td>Low back pain</td>
</tr>
<tr>
<td>724.5/Backache, unspecified</td>
<td>M54.9/Dorsalgia, unspecified</td>
<td>161891005/Backache</td>
<td>Backache</td>
</tr>
<tr>
<td>496/Chronic airway obstruction, not elsewhere classified</td>
<td>J44.9/Chronic obstructive pulmonary disease, unspecified</td>
<td>13645005/Chronic obstructive lung disease</td>
<td>Chronic obstructive pulmonary disease</td>
</tr>
<tr>
<td>786.2/Cough</td>
<td>R05/Cough</td>
<td>49727002/Cough</td>
<td>Cough</td>
</tr>
<tr>
<td>300.0/Anxiety state, unspecified</td>
<td>F41.9/Anxiety disorder, unspecified</td>
<td>48694002/Anxiety</td>
<td>Anxiety</td>
</tr>
<tr>
<td>599.0/Urinary tract infection, site not specified</td>
<td>N39.0/Urinary tract infection, site not specified</td>
<td>68566005/Urinary tract infectious disease</td>
<td>Urinary tract infection</td>
</tr>
<tr>
<td>278.00/Obesity, unspecified</td>
<td>E66.9/Obesity, unspecified</td>
<td>414916001/Obesity</td>
<td>Obesity</td>
</tr>
<tr>
<td>272.2/Mixed hyperlipidemia</td>
<td>E78.2/Mixed hyperlipidemia</td>
<td>267434003/Mixed hyperlipidemia</td>
<td>Mixed hyperlipidemia</td>
</tr>
<tr>
<td>278.01/Morbid obesity</td>
<td>E66.01/Morbid (severe) obesity due to excess calories</td>
<td>238136002/Morbid obesity</td>
<td>Morbid obesity due to excess calories</td>
</tr>
<tr>
<td>477.9/Allergic rhinitis, cause unspecified</td>
<td>J30.9/Allergic rhinitis, unspecified</td>
<td>61582004/Allergic rhinitis</td>
<td>Allergic rhinitis</td>
</tr>
<tr>
<td>V58.61/Long term (current) use of anticoagulants</td>
<td>Z79.01/Long term (current) use of anticoagulants</td>
<td>266713003/Long-term drug therapy</td>
<td>Long-term use of anticoagulants</td>
</tr>
<tr>
<td>715.90/Osteoarthritis, unspecified whether generalized or localized, involving unspecified state</td>
<td>M19.90/Unspecified osteoarthritis, unspecified state</td>
<td>396275006/Osteoarthritis</td>
<td>Osteoarthritis</td>
</tr>
<tr>
<td>V20.2/Routine infant or child health check</td>
<td>Z00.129/Encounter for routine child health examination without abnormal findings</td>
<td>102506008/Well child</td>
<td>Well child exam</td>
</tr>
<tr>
<td>ICD-9 Code/Description</td>
<td>ICD-10 Code/Description</td>
<td>SNOMED Code/Description</td>
<td>Provider-Friendly Description</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>----------------------------------</td>
<td>--------------------------------------------</td>
<td>-------------------------------------------------------------------</td>
</tr>
<tr>
<td>V70.0/Routine general medical examina-</td>
<td>Z00.00/Encounter for general adult</td>
<td>268565007/Adult health examination</td>
<td>Routine medical exam</td>
</tr>
<tr>
<td>tion at a health care facility</td>
<td>medical examination without ab-</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>noral findings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>V04.81/Need for prophylactic vaccina-</td>
<td>Z23/Encounter for immunization</td>
<td>1411000119106/Influenza vaccine needed</td>
<td>Need for prophylactic vaccination and inoculation against influenza</td>
</tr>
<tr>
<td>tion and inoculation against influenza</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>V06.1/Need for prophylactic vaccina-</td>
<td>Z23/Encounter for immunization</td>
<td>399014008/Vaccination for diphtheria, pertussis, and tetanus</td>
<td>DTaP vaccination</td>
</tr>
<tr>
<td>tion and inoculation against Diphtheria</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>tetanus-pertussis, combined [DPT] [DTaP]</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>530.81/Esophageal reflux</td>
<td>K21.9/Gastro-esophageal reflux</td>
<td>235595009/Gastro-esophageal reflux disease</td>
<td>Gastroesophageal reflux</td>
</tr>
<tr>
<td></td>
<td>disease</td>
<td></td>
<td></td>
</tr>
<tr>
<td>780.60/Fever unspecified</td>
<td>R50.9/Fever unspecified</td>
<td>386661006/Fever</td>
<td>Fever</td>
</tr>
<tr>
<td>786.50/Unspecified chest pain</td>
<td>R07.9/Chest pain, unspecified</td>
<td>29857009/Chest pain</td>
<td>Chest pain</td>
</tr>
<tr>
<td>427.31/Atrial fibrillation</td>
<td>I48.91/Unspecified atrial fibril-</td>
<td>49436004/Atrial fibrillation</td>
<td>Atrial fibrillation</td>
</tr>
<tr>
<td></td>
<td>lation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>414.01/Coronary atherosclerosis of nat-</td>
<td>I25.10/Atherosclerotic hearth</td>
<td>1641000119107/Coronary atherosclerosis in</td>
<td>Coronary atherosclerosis</td>
</tr>
<tr>
<td>ive coronary artery</td>
<td>disease of native coronary artery</td>
<td>native coronary artery</td>
<td></td>
</tr>
<tr>
<td></td>
<td>without angina pectoris</td>
<td></td>
<td></td>
</tr>
<tr>
<td>285.9/Anemia, unspecified</td>
<td>D64.9/Anemia, unspecified</td>
<td>271737000/Anemia</td>
<td>Anemia</td>
</tr>
</tbody>
</table>
Appendix A - Uninstalling SQL Management Studio Express 2005

If you have version 2005 installed, you will need to uninstall it prior to installing CGM LYTEC.

To uninstall this program:
1. Click Start, and then click Control Panel.
2. Double-click Add or Remove Programs.
3. In the list of installed programs, click Microsoft SQL Server Management Studio Express, and then click Remove.
4. Click the Yes button on the warning screen. The program is uninstalled.
Appendix B - Setting Permissions for the CGM LYTEC MD Root Drive and Folders

Workstations and users must have full access to the root drive and folders where the Practice Partner files are stored.

1. On the server drive, double click the My Computer icon or select Start, and then Computer.
2. Right-click on the drive set up for CGM LYTEC MD Server/Practice Partner (typically P:) and click Properties.
3. Select the Sharing tab and click Advanced Sharing.
4. Select the Share this folder check box.
5. Specify the Share name (typically P).

![Advanced Sharing screen on Sharing tab](image)

Figure 62. Advanced Sharing screen on Sharing tab

6. Click the Permissions button. The Permissions screen appears.
7. Click the Add button.
8. Type in USERS in the Enter the object names to select box.
9. Click the OK button.
10. Repeat this process and create a SYSTEM user and a DOMAIN USER (if you are on a domain; If there is no domain, you might get a message telling you so).
11. On the Permissions screen, select each user from the Group or user names box and then click Allow for Full Control in the Permissions for… box.

12. Click the OK button twice to return to the Properties screen.
14. Highlight Everyone and click Edit.
15. On the Permissions screen, select the **Allow** check box for **Full Control**.

![Permissions tab Allow for Full Control](image)

16. Highlight SYSTEM, Users, and Domain (if necessary) and select the **Allow** check box for Full control.

17. Click the **OK** button.

18. Click the **Close** button on the Properties screen and close My Computer.
Appendix C - Add-Ons

Your CGM LYTEC MD download comes with five add-on applications that can enhance the capabilities of CGM LYTEC MD. These add-Ons are

<table>
<thead>
<tr>
<th>Add-On</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ePrescribing</td>
<td>Use ePrescribing to send and receive prescription-related messages to and from pharmacies, to view real-time pharmacy benefits and eligibility data on your patients, to see up-to-date formulary and coverage information for specific drugs during the prescribing process, and to view information about prescriptions your patients have had filled, even from other providers</td>
</tr>
<tr>
<td>Templates</td>
<td>Use templates to save time by eliminating the need to type up routine tasks. Templates contain often repeated text and the necessary codes for a given problem. When you use a template in a note, you only need to add patient-specific information.</td>
</tr>
<tr>
<td>PPConnect</td>
<td>Use PPConnect to add and update information from a third-party system into Practice Partner Patient Records and Appointment Scheduler, as well as Practice Partner to a third-party system.</td>
</tr>
<tr>
<td>Remote Client Connect</td>
<td>Use Remote Client Connect to run interfaces on client workstations.</td>
</tr>
<tr>
<td>LabCorp</td>
<td>Use LabCorp to receive patient lab results and send orders created in Patient Records to the lab.</td>
</tr>
</tbody>
</table>

Installing Add-Ons

To install an Add-On:

1. Launch the CGM LYTEC MD download. The Autorun screen appears.
2. Click the **CGM LYTEC MD Add-Ons** link. A list of Add-Ons appears.
3. Click the link for the Add-On you want to install. The installer starts.
4. Follow the installation wizard for the Add-On.
Appendix D - Linking CGM LYTEC With Other Applications

MPIC is an application that is installed and configured independently of CGM LYTEC. It will transmit data from CGM LYTEC to other applications. You can use MPIC to link CGM LYTEC to Practice Partner.

You can download the latest version of MPIC here: https://supportcenter.emds.com/richmond/articles/Richmond_VAR_KBA/LYTEC-and-LYTEC-MD-Download-Links

eMDs recommends that you download and open the MPIC User's Guide prior to installing or configuring MPIC. You can find the User's Guide on the Lytec Documentation page in Support Center.
Appendix E - Changing the number of licensed users

To change the number of licensed users:
You must know the path to your CGM LYTEC MD data files directory (typically p:\ppart). All users must exit out of all CGM LYTEC MD applications.

NOTE: this will affect only CGM LYTEC MDl/Practice Partner. It will NOT affect CGM LYTEC Client.

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 pplfic.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 pplfic.txt.
   a. From the Windows Taskbar, click the Start button and then select Run from the menu.
   b. Type the path to your CGM LYTEC MD 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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