

MEDI-GATE INTEGRATOR™
INSTALLATION GUIDE
(Microsoft XP, Windows 2000)

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MEDI-GATE INTEGRATOR™ – INSTALLATION GUIDE**Getting Started**

The installation of the software and print drivers typically takes about 30 minutes to complete (for Windows NT, 2000, or XP you must have administrative rights in order to install the software). Basically, the interface technology utilizes reports from a customer's practice management information system, such as a patient face sheet, and "directs" the output to the Medi-Gate server where the patient information is then extracted from the report and formatted for later retrieval. In order to ensure the minimal disruption to your time and to complete the interface process, in addition to installing the software, you will also need to have the following information available:

- The Organization ID (OrgID), Username, and Password sent upon enrollment.
- Identified a report(s) from the customer's practice management information system that contains patient demographic information, and a report that contains patient insurance information; or, ideally, one report that contains both.

What information are we looking for on the reports? For on-line lab services, patient demographic information and related insurance plan information are the key pieces of information we look for when moving information from the billing system to the on-line services. The minimum information we need for a patient is their first name, last name, birth date, and social security number. However, the more information we can get, the less a user must type when ordering labs. This information includes patient address, phone number, and what insurance plans (name and ID numbers) they have. In many cases, the information we are looking for is contained in a patient face sheet or demographic batch report.

Once the Medi-Gate software has been loaded and the print driver installed, all you need to do is connect your PC to the Internet and "print" the report(s).

Installing the Medi-Gate Integrator™

Installation of the Medi-Gate Integrator™ and its associated components will take approximately 30 minutes and is divided into the following nine steps:

- Step 1 - Verify System Requirements
- Step 2 - Verify Software Requirements
- Step 3 - Install the Medi-Gate Integrator™
- Step 4 - Configure the Medi-Gate Integrator™
- Step 5 - Install the Re-direction Port Monitor
- Step 6 - Install the Generic PostScript Driver
- Step 7- Install the Medi-Gate print driver(s)
- Step 8 - Configure Medi-Gate Print Drivers
- Step 9 Transmit Report Information to Medi-Gate

The following directions will guide you through the steps needed to install the program.

System Requirements

Before starting the install process, please verify that the workstation on which you are installing the software is one of the following:

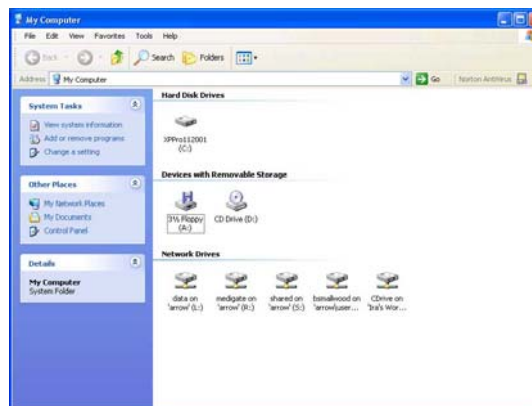
- Microsoft Windows® 98
- Microsoft Windows NT® 4.0 (SP 6a required)
- Microsoft Windows Millennium Edition (Windows Me)
- Microsoft Windows 2000 (SP2 Recommended)
- Microsoft Windows XP Professional
- Microsoft Windows XP Home Edition

Verify that your system meets the system requirements

If you are unsure of which operating system you have, complete the following steps below; otherwise, skip to the Software Requirements section.

To verify that your system meets the above state system requirements:

1. Navigate to your Window's Desktop and double-click the My Computer icon.
 - The My Computer Window appears.



2. Click the View the Help option on the menu bar, and then select About Windows.
 - The About Windows screen appears displaying the type and version of this operating system.



Software Requirements

In order for the Medi-Gate software to function, you must have the following software programs loaded:

- Microsoft Internet Explorer 5.01 or later
- Microsoft .NET Framework
- An Internet Connection

The following sections describe how you can determine whether or not you have the appropriate software.

Verify that your system meets the software requirements

If you are unsure of what version of Internet Explorer you have, or whether the Microsoft .NET Framework is loaded on your machine complete the following. Otherwise skip to the Install the Medi-Gate Integrator™ section:

Determine of the Version of Internet Explorer :

If you are unsure of which version of Internet Explorer you have:

1. Launch your current Internet Explorer.
2. From your browser window, click the Help option on the menu bar, and then select About Internet Explorer.
 - The About Internet Explorer screen appears displaying your version of Internet Explorer. You must have version 5.01 or greater.



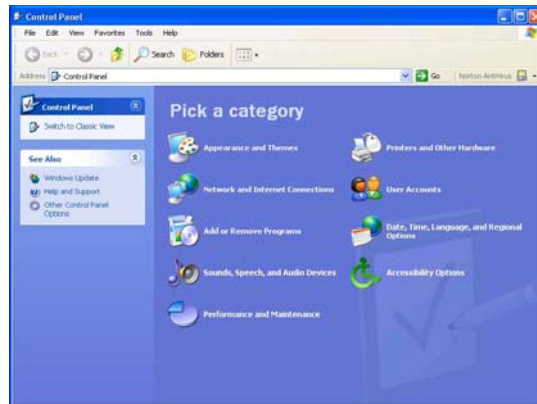
- If you have Internet Explorer 5.01 or greater skip to the Do I Have the Microsoft .Net Framework section.
- If you do not have Internet Explorer 5.01 or greater, you need to install a newer version for the Medi-Gate software to work. Microsoft Explorer version 6.0 is included on the Medi-Gate CD you received in the mail. If you need directions on how to install this Internet Explorer, you can refer to Appendix A of this installation guide.

Remember, you only need to install this if your current version of Internet Explorer is not version 5.01 or greater.

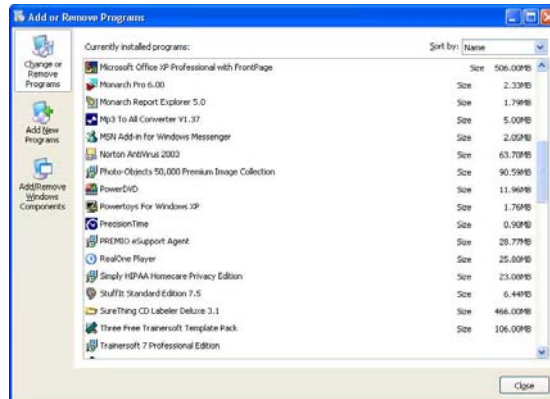
Do I Have the Microsoft .Net Framework

If you are unsure of whether or not you have the Microsoft .Net Framework installed:

1. Click your Windows Start button and select Control Panel. Note: Windows 2000 users use the following path Start>Settings>Control Panel
 - The Control Panel Window appears.



2. Click Add or Remove Programs
 - A list of programs installed on your computer displays.
 - Search for an entry called Microsoft .Net Framework (English). If it is on the list, proceed to the Install the Medi-Gate Integrator™ section.

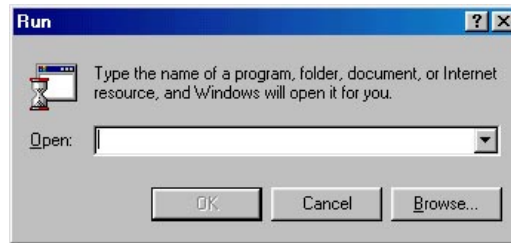


- If the Microsoft .NET Framework is not on the list, you need to install it. Follow the directions below to install the Microsoft .Net Framework. If you need directions on how to install the Microsoft .NET Framework, you can refer to Appendix B of this installation guide.

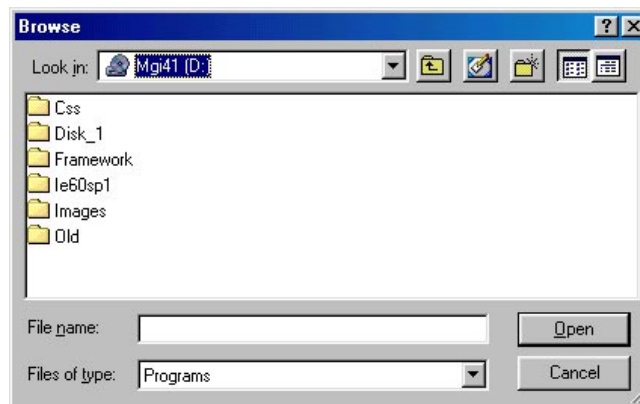
Install the Medi-Gate Integrator™

Once you have verified the system and software requirements, you are ready to install the Medi-Gate Integrator™. Note: These install instructions assume you are installing from a CD. If you downloaded and extracted the software from the Medi-Gate section of the Customer Center, you just need to locate and double-click the setup.exe file, and then skip to step 6.

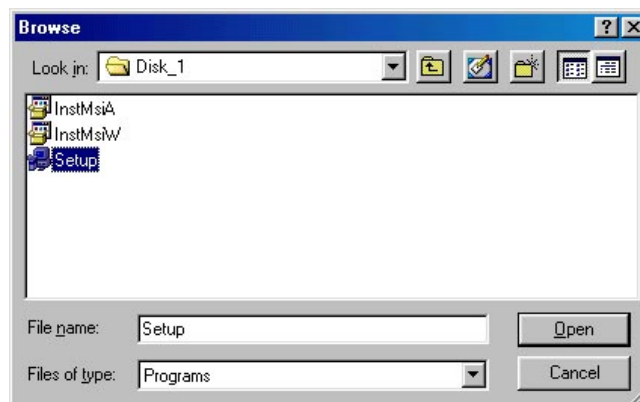
1. Insert the Medi-Gate CD in the CD-ROM drive, and then click the following: Start>Run.
 - The Run window appears.



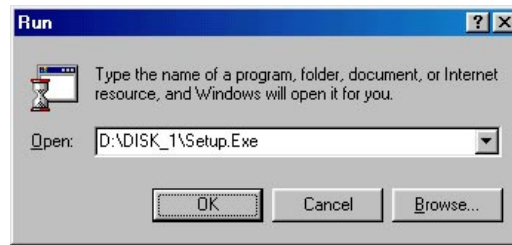
2. Using the Browse button, browse to and select your CD drive.
 - The Browse window appears displaying the contents of the CD. To install the program, you need to access the Disk_1 folder.



3. Double-click the Disk_1 folder to select it.
 - A number of files appear.



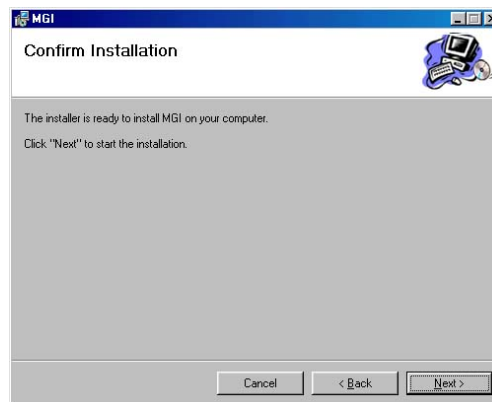
4. Double-click the setup file.
 - The Run dialog box reappears.



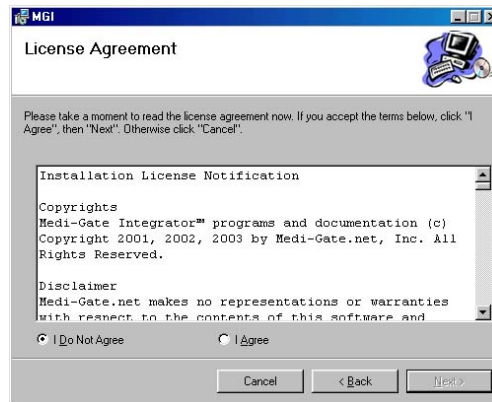
5. Click OK to launch the setup program.
 - The Welcome to MGI Setup Wizard screen appears. This wizard will guide you through the setup process.



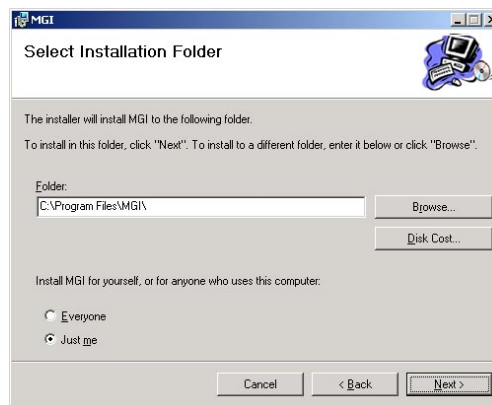
6. From the MGI Setup Wizard screen, click Next.
 - The Confirm Installation screen appears.



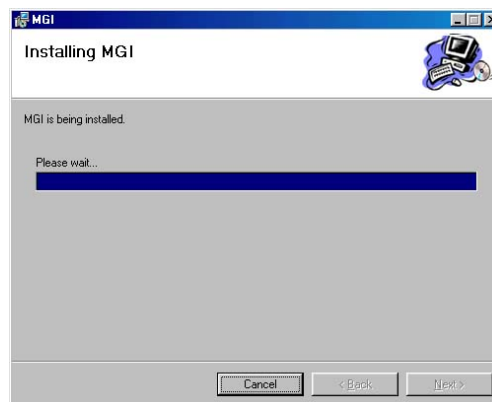
7. Click Next to begin the installation process
 - The License Agreement screen appears. Read the license agreement.



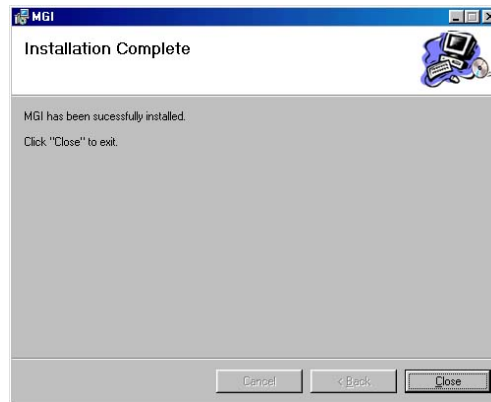
8. Click the I Agree option, and then click Next to continue
 - The Select Installation Folder screen appears.



9. Accept the default path, and then indicate whether this application is being installed just for the one user or for everyone (**typically everyone**). Finally, click Next
 - The Installing MGI screen appears. This process may take a few moments.



- Once it has been completed, the Installation Complete screen appears.



10. Click the Close button.

- Once the program is installed, an MGI program option will appear as another option in your Windows™ program manager. You will also see a program icon on your desktop for the application.



Completing Medi-Gate Setup Options

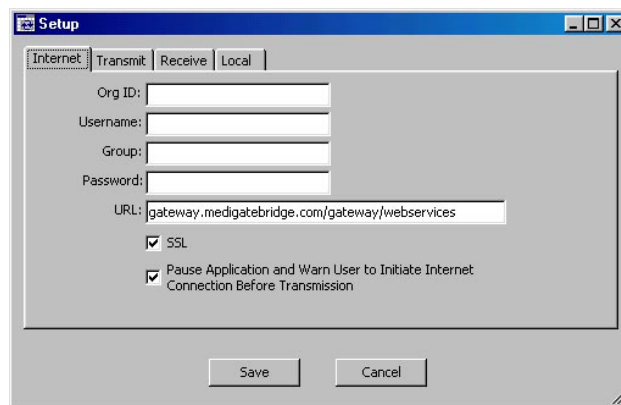
Before you can begin to use the Integrator™, you must complete setup options to send and receive data. Specifically, you need to enter the Organization ID (OrgID), User name, and Password. You will need that information to complete this step.

To set up Medi-Gate Integrator™ to send and receive data, complete the following steps:

1. Access your Windows desktop.
2. Double-click the MGI.NET icon to launch the Medi-Gate Integrator™.
 - The Medi-Gate Integrator™ screen appears. The next step is to configure the Integrator to be able to send and receive information.



3. Click the File option on the menu bar, and then select Setup.
 - The Setup screen appears. You need to complete the OrgID, Username, and Password fields with the information supplied to you from Medi-Gate.



4. Enter the assigned organization ID in the OrgID field.
5. Enter the assigned username in the Username field.
6. Enter the assigned password in the Password field.
7. De-select the Pause Application and Warn user to Initiate Internet Connection Before Transmission check box.

8. Click the Save button to save your work.

- You have finished installing the Medi-Gate Intergrator.
- The next step is to install the appropriate Medi-Gate print driver(s).

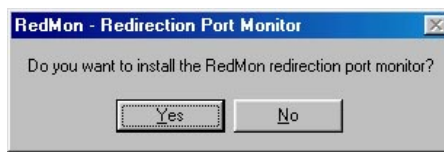
Install the Redirection Monitor Software

In this next step, you need to install a piece of software that re-directs the output of a captured printer to a specific application based on a number of parameters you supply.

1. From the Windows Desktop, click the following menu options:

Start>Programs>MGI.NET>Install Redirection Monitor.

- An informational message appears asking you to confirm installation.



2. Click Yes.

- An installation successful message appears.



3. Click OK

- You have finished installing the Re-direction Port Monitor software. The next step is to install a postscript driver for Medi-Gate to use.

Install Generic PostScript Driver

This driver extracts the postscript from a printer report so that we can then convert the file to text on the Medi-Gate server.

1. From the Windows Desktop, click the following menu options Start>Programs>MGI.NET>Install PostScript Driver.
 - The Adobe Setup PostScript screen briefly appears.



- Once the program is ready, the Adobe PostScript Driver Setup screen will appear. You follow the prompts to install this driver.



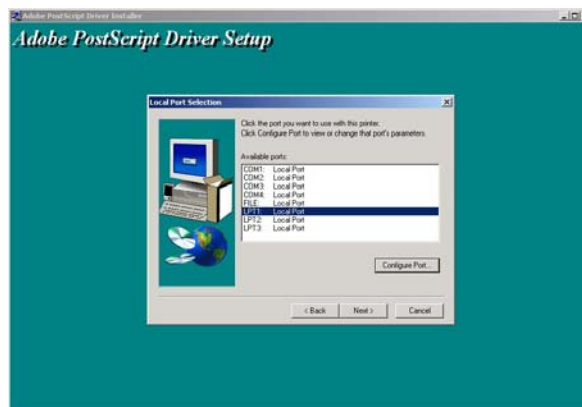
2. Click Next to continue.
 - The End User License Agreement screen appears



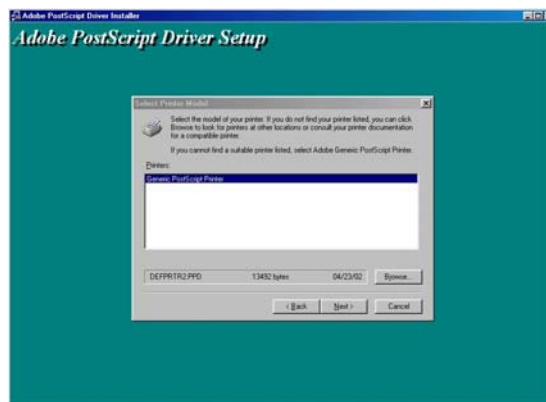
3. Click Accept.
 - The Printer Connection Type screen appears.



4. Verify that the Local Printer option is selected, and then click Next.
 - The Local Port Selection screen appears. You do not need to select anything on this screen. You will be creating a new port later.



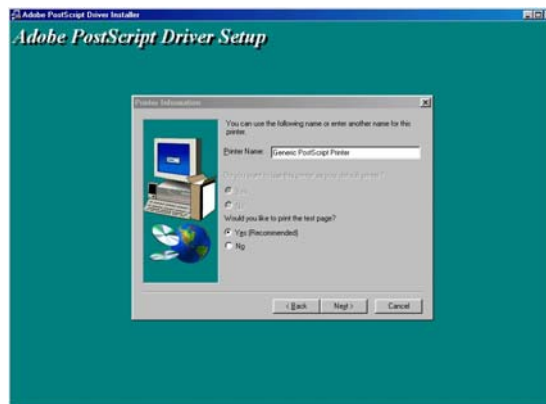
5. Accept whatever defaults on the Local Port Selection screen, and then click Next to continue.
 - The Select Printer Model screen appears displaying the Generic PostScript Printer in the Printers list.



6. Click Next to continue.
 - The Sharing screen appears.



7. Verify/Indicate that this printer will not be shared with other network users, and then click Next to continue.
 - The Printer Information screen appears displaying the printer name Generic PostScript printer.



- You need to add a more descriptive name. The name that you use depends on what type of report is being sent to this print device and the how the reports can be printed. The table below summarizes the printer names to use based on the situation. Following the table, are three brief scenarios that further explain which printer drivers/names should be used. Use these scenarios to determine how many printer drivers, and their associated names, need to be loaded. For information on loading more than one printer, refer to the Adding a Printer section of this document.

Type of Report	Use this Printer Name
Demographics report	Medi-Gate Demographics
Patient Insurance report	Medi-Gate PatInsurance
Patient Demographics/Insurance report	Medi-Gate Demographic/Insurance

Scenario 1

You have located two reports that contain the appropriate information. One contains patient demographic information (name, address, SS, birth date, etc), the other contains patient insurance information (patient insurance company, policy, group, insured party, etc). In this scenario, you would need to load two printer drivers:

Type of Report: Patient demographics (no patient insurance information)

Printer name: Medi-Gate Demographics

When to use: When you have identified two different reports containing the information you need, and the first printer driver you are loading is for the demographics report.

Type of Report: Patient Insurance

Use this printer name: Medi-Gate Insurance

When to use: When you have identified two different reports containing the information you need. Of which this report pertains to patient insurance.

Scenario 2

You have located one report that contains all of the appropriate information. In addition this report can be printed for all patients or one patient at a time. In this scenario, you would just need to load one printer driver.

Type of Report: Batch Patient Demographics & Patient Insurance report

Use this printer name: Medi-Gate Demographics/Insurance

When to use: Use this name when all the information needed is contained in one report, and the report can be printed for one or more patients (can be printed in batch).

Scenario 3

You have located two reports that contain the appropriate information. One contains patient demographic information and the other contains patient insurance information. In addition, you have also located another report that contains all information, but only prints for individual patients (not a range or group of patients). In this scenario, you would need to load three printer drivers. The first two would be used to load patient data in batch (pre-load all patients). The third driver/name would be used to update as new patients came in or existing patient information changes:

Type of Report: Patient demographics (no patient insurance information)

Printer name: Medi-Gate Demographics

When to use: When you have identified two different reports containing the information you need, and the first printer driver you are loading is for the demographics report.

Type of Report: Patient Insurance

Use this printer name: Medi-Gate Demographics

When to use: When you have identified two different reports containing the information you need. Of which this report pertains to patient insurance.

Type of Report: Patient Demographics & Patient Insurance report

Use this printer name: Medi-Gate Demographic/Insurance

When to use: Use this driver name when all the information needed is contained in one report, **but** the report can only be printed for one patient at a time.

11. Type the printer name on the Printer Name field. Then click the No radio button so that you do not print a test page, and then click Next.
 - The Setup Info screen appears.



12. Click Install.
 - The Printer Configuration screen appears. **You do not need to configure this printer at this time.**



13. Click the No radio button, and then click the Next button.
 - The Setup Complete screen appears.



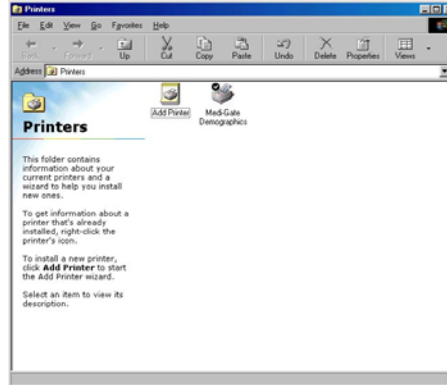
14. De-select the Readme file check box, and then click Finish.

- You have finished installing the PostScript Driver (the first Medi-Gate printer).
- The next step is to install any other Medi-Gate print drivers (printers), if applicable. Remember, the drivers you install are based on the reports you are running. If you are running two reports, you need two drivers (which means you would need to add one more driver (printer); if you are just running one report, you just need the one driver that you just finished installing.
- If you need to add another driver (printer), continue with the next section (Adding a Printer). If you do not need to add another printer, then skip directly the Configure the Printer section of this document.

Adding a Printer(s)

Use this procedure to add additional printers (drivers) over and above the one printer you have already installed.

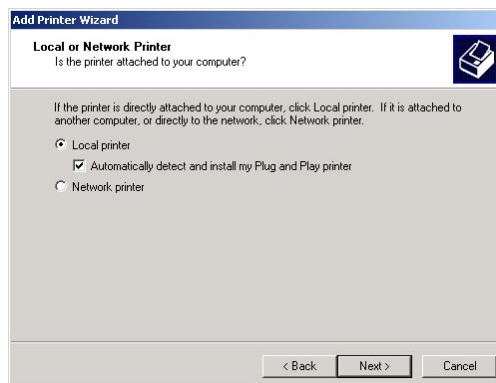
1. Access the Printer window by clicking in the following menu options: Start>Printers and Faxes.
 - Note: For Win2000 users, select Start>Settings>Printers.
 - The Printers window appears.



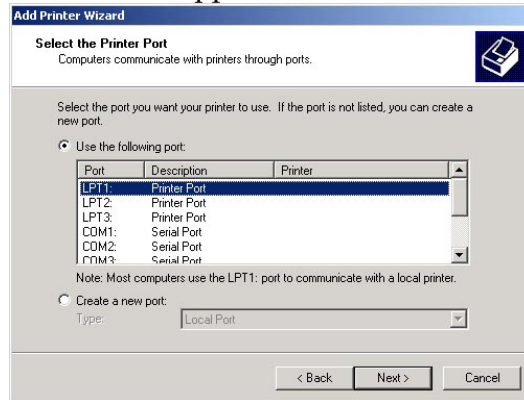
2. Double-click the Add Printer icon.
 - The Add Printer Wizard screen appears. This wizard will guide you through the printer setup process.



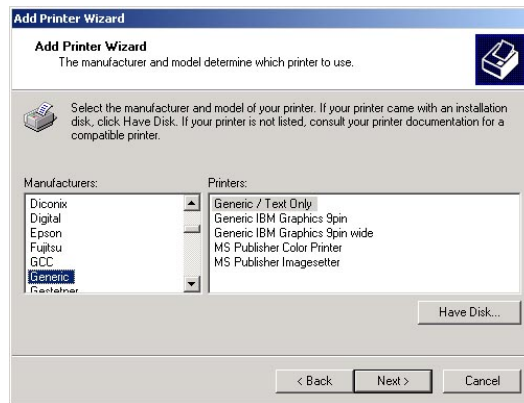
3. Click Next to continue.
 - The Local or Network screen appears. You need to select/verify that the Local printer option is selected. Remember, you are not actually adding a physical printing device.



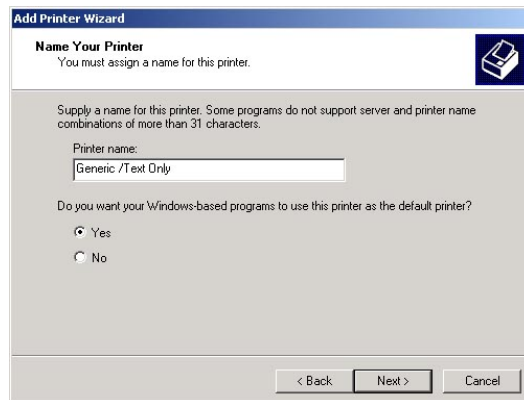
4. Verify that local printer is selected, and then de-select “Automatically detect and install my Plug and Play printer”. Then click Next to continue.
 - The Select the Printer Port screen appears.



5. Accept whatever the default is, you will create a new port later on. Then click Next.
 - The Select the manufacturer and model of your printer screen appears.



6. Select Generic from the Manufacturer list (if generic is not listed, select anything), and then click Next.
 - The Printer Name dialog box appears. Enter the appropriate Medi-Gate name. Note, if the Use Existing Drive screen appears instead (this is the third printer you are adding and have previously selected Generic), verify that the “Keep existing driver” option is selected and click Next. The Printer Name dialog box will then display.

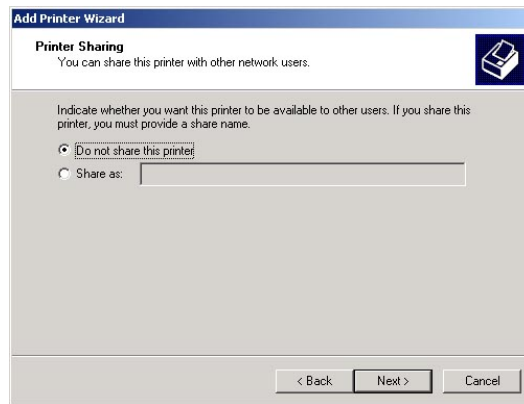


7. Enter the appropriate printer name (based on the table below).

Type of Report	Use this Printer Name
Demographics report	Medi-Gate Demographics
Patient Insurance report	Medi-Gate PatInsurance
Patient Demographics/Insurance report	Medi-Gate Demographic/Insurance

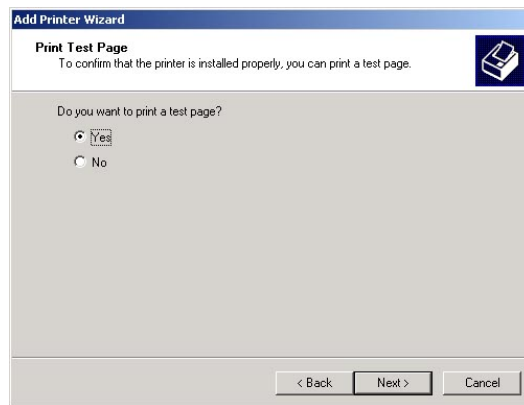
8. Verify that the **No** option is selected for “Do you want to use this as your default printer?” Then click Next.

- The Printer Sharing screen appears.



9. Verify that the “Do not share this printer” option is selected, and then click Next.

- The “Would you like to print a test page” screen appears.



10. Click No, and then click Next.

- The Add Printer Wizard Completion screen appears.



11. Click Finish.

- Copying files screen may briefly appear. When the process has been completed, the Printers window will appear displaying the printer just added.



- Repeat this process to add any other printers required.
- If you have finished adding printers, the next step is to configure the printers you have added.

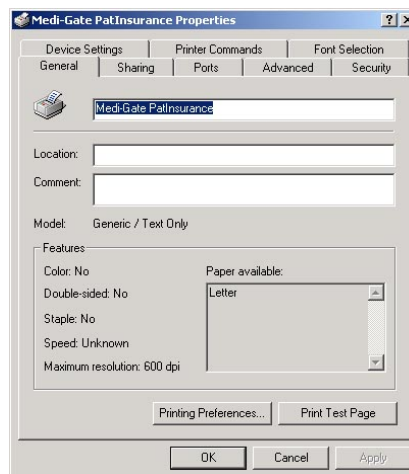
Configure the Medi-Gate Print Driver(s)

Once all the appropriate print drivers (printers) have been added, the next step is to configure each printer. The following process can be used to configure each printer.

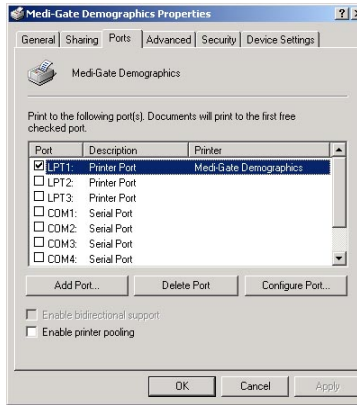
1. Access the Printer window by clicking in the following menu options: Start>Printers and Faxes.
 - Note: For Win2000 users, select Start>Settings>Printers.
 - The Printers window appears displaying any Medi-Gate printers you have installed. The next step is to configure each of these printers.



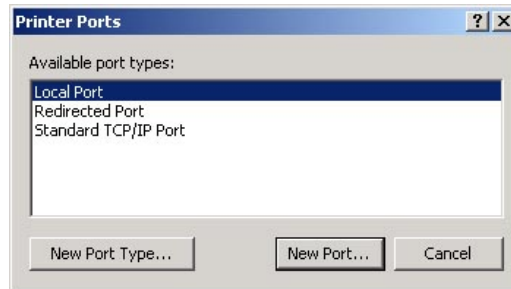
1. Right-click the appropriate Medi-Gate printer, and then select Properties from the resulting menu.
 - The Medi-Gate Properties screen appears.



2. Click the Ports tab.
 - The Ports tab appears displaying printer details. You need to add a new printer port for this Medi-Gate printer to use.



3. Click the Add Port button.
 - The Printer Ports dialog box appears. The type of port you need to create is a new Redirected port.

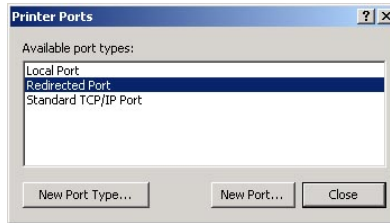


4. Select Redirected Port, and then click New Port.
 - The Add Redirected Port dialog box appears displaying a default port name (RPT1).

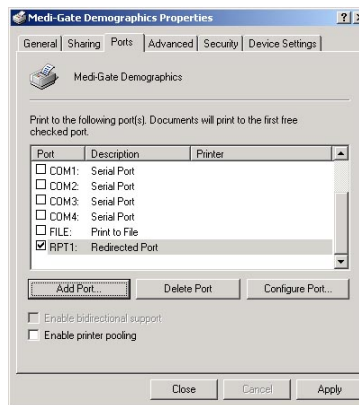


- Note: When configuring additional printers, the Port Name field with sequentially advance (for example RPT2, RPT3).

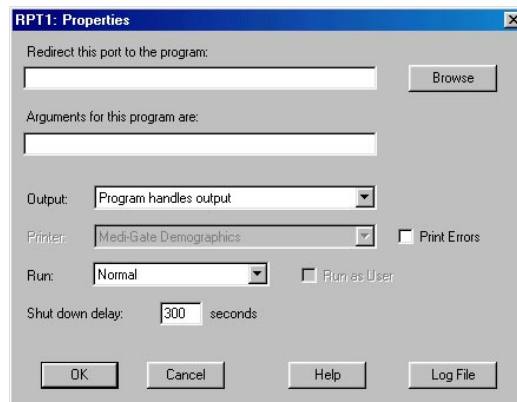
5. Accept the default name, and then click OK.
 - The Printer Ports dialog box reappears.



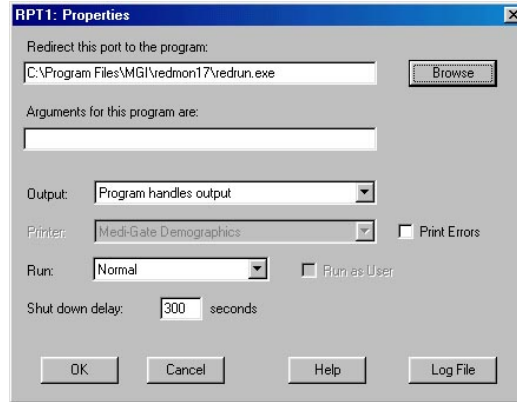
6. Click Close.
 - The Properties dialog box reappears. Notice that the new added port is selected for this printer. The next step is to configure the settings for this port.



7. Click Configure port.
 - The [portname] Properties dialog box appears. The next step is to indicate the program to which this port is being re-directed using the "Redirect this port to the program" field.

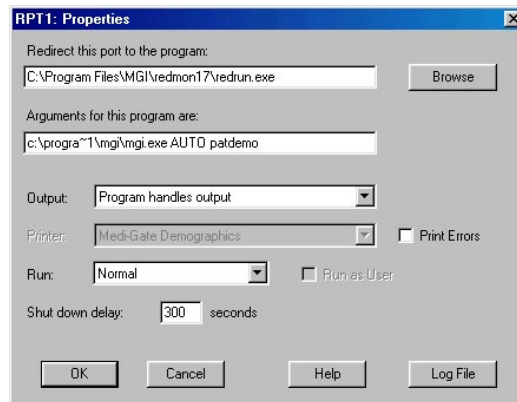


8. Click the Browse button and browse to and select: C:\Program Files\MGI\redmon17\redrun.exe.
 - The re-direction path and program is copied to the “Redirect this port to the program” field.

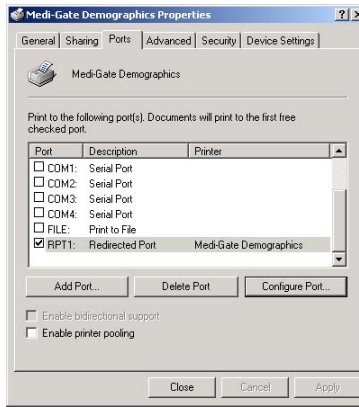


9. Click the “Arguments for this program are” field and type the following:
 - c:\progra~1\mgi\mgi.exe AUTO [Name of the Medi-Gate File]
 - Where Name of the Medi-Gate File is based on the type of report you are printing to this port. Use the following table to determine the name. For example, if it is a printer for patient demographics use the name patdemo. Hence the Argument field would display: c:\progra~1\mgi\mgi.exe AUTO patdemo

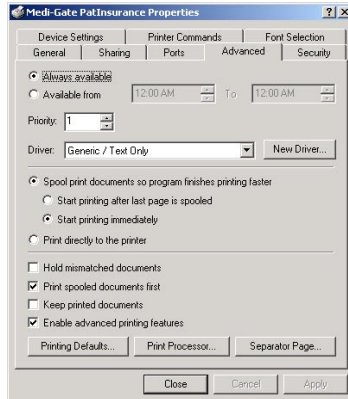
Type of Report	Use this Name
Demographics report	patdemo
Patient Insurance report	patins
Patient Demographics and Insurance report	bpatdemoins



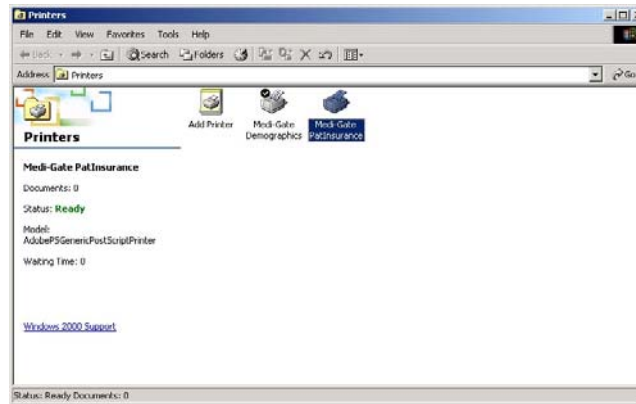
10. Click the down-arrow button for the Run field and select Hidden. Then click OK.
 - The Properties dialog box reappears. You know need to assign the correct print driver to this printer. As you may recall, when creating the printer we selected a Generic driver (or some other printer). We now need to select the Adobe PostScript Driver we installed earlier.



11. Click the Advanced tab.
 - The Advanced properties tab appears. You need to verify or select the AdobePSGenericPostScriptPrinter driver on this tab. If this is the first printer you installed, this driver will display in the Driver field. If it is not the first printer you installed, you will need to select this driver.



12. Verify/Select the AdobePSGenericPostScriptPrinter driver in the Driver field, and then click Close.
 - The Printers window reappears. You have finished configuring the first printer. If you have additional Medi-Gate printers, you need to configure those printers as well using this process.

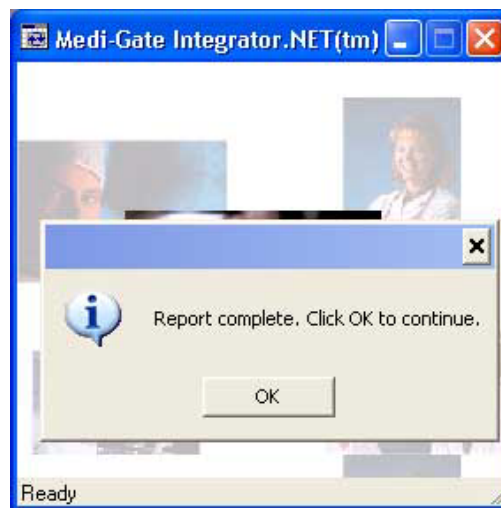


Transmitting Information to Medi-Gate to Complete the Interface Process

To complete the interface process, we need you to print the appropriate report/s (patient demographic and patient insurance information) from the practice management information system to the specified print drivers just installed. This will capture the report in a file that can be sent to Medi-Gate servers via the Medi-Gate Integrator™ you previously installed. Once the information is received, we can then build the templates to format the information for later retrieval.

To prepare and transmit report information to Medi-Gate:

1. Locate the appropriate report in your practice management information system.
 - Note: If you can filter the report, try to filter for new patients or patients whose last names begin with a certain letter (this is just to keep the initial size of the report to a smaller size).
2. Take the steps to print the report.
 - When the printer dialog box appears asking you what printer to send the output to, click the appropriate Medi-Gate printer selection.
 - Remember, if you have more than one Medi-Gate printer installed, make sure you select the appropriate one for the report you are printing (e.g., demographics or patient insurance information).
3. Once the appropriate printer has been selected, click the Print button.
 - Clicking the Print button will automatically activate and display the Medi-Gate Integrator™.
 - A message appears once the report has completed printing.



4. Click OK.

- A warning message may appear telling you to make sure the internet connection is online.



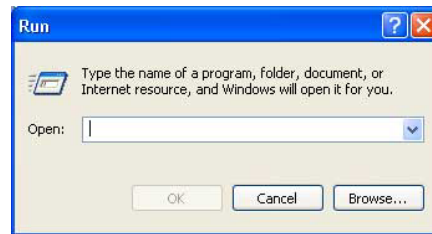
5. Click OK.

- The file information will be sent to the Medi-Gate Server.
- MedPlus will let you know when the extraction templates, based on the report information you just transmitted, are complete. At which point, you can inform the customer that they can begin using the Intergrator regularly.

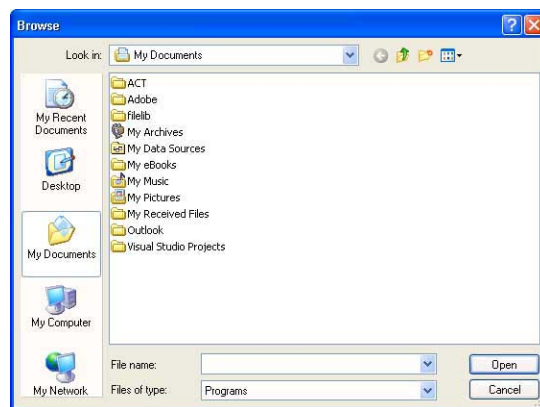
Appendix A: Installing Microsoft Internet Explorer

If you need to install Microsoft Internet Explorer:

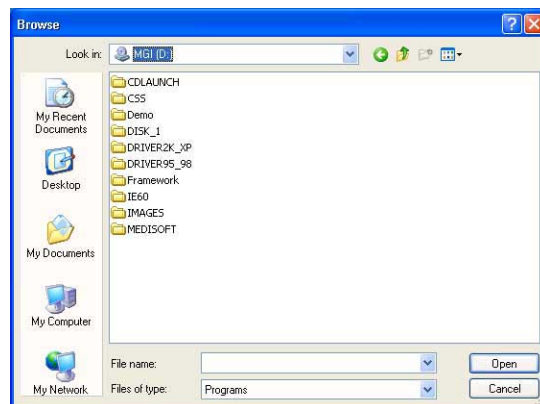
1. Insert the Medi-Gate CD in the CD-ROM drive.
2. Click the Windows Start button, and then select Run.
 - The Run dialog box appears.



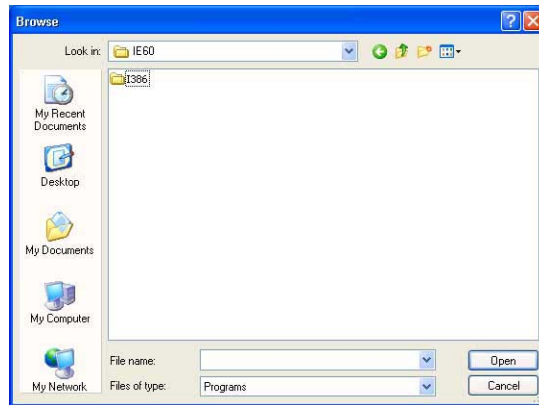
3. Click the Browse button.
 - The Browse screen appears.



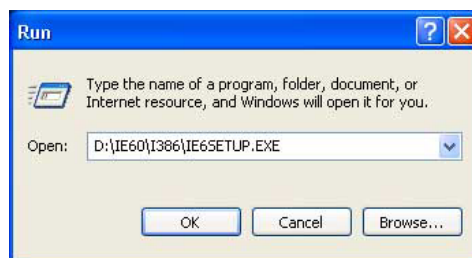
4. Click the down arrow in the Look In field and select your CD-ROM drive (it should say MGI).
 - A list of file folders appears.



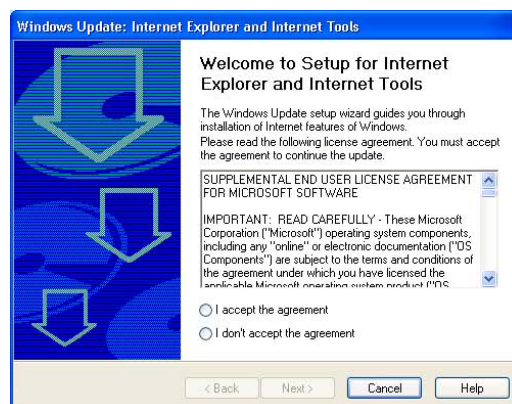
5. Double-click the IE60 file folder.
 - A list appears displaying the I386 folder.



6. Double-click the IE6SETUP.EXE file.
 - The Run dialog box reappears displaying the file just selected.



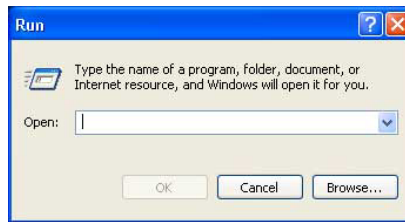
7. Click OK
 - The Windows Update: Internet Explorer and Internet Tools Wizard appears. This Wizard will guide you through the setup process. Once you have completed installing Microsoft Internet Explorer, return to the verify that your system meets the software requirements



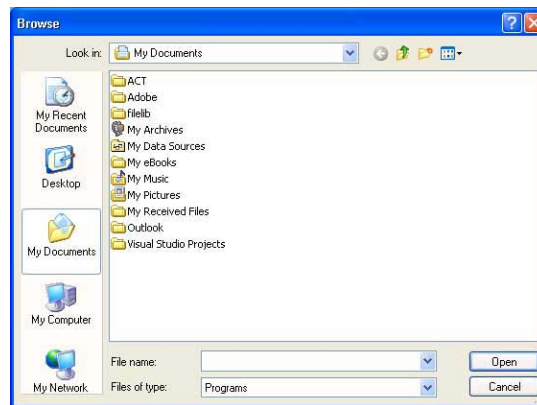
Appendix B: Installing the Microsoft .NET Framework

If you need to install the Microsoft .Net Framework:

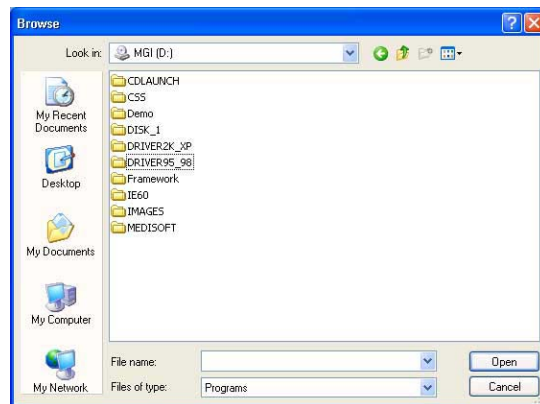
1. Insert the Medi-Gate CD in the CD-ROM drive.
2. Click the Windows Start button, and then select Run.
 - The Run dialog box appears.



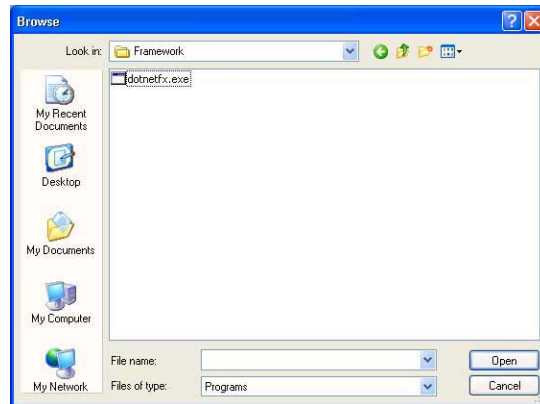
3. Click the Browse button.
 - The Browse screen appears.



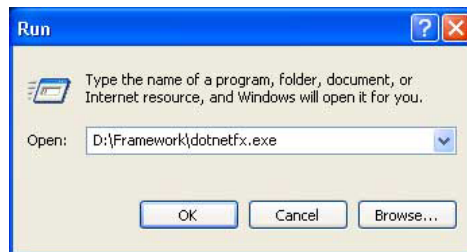
4. Click the down arrow in the Look In field and select your CD-ROM drive (it should say MGI).
 - A list of file folders appears.



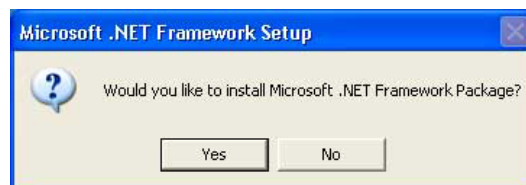
5. Double-click the Framework file folder.



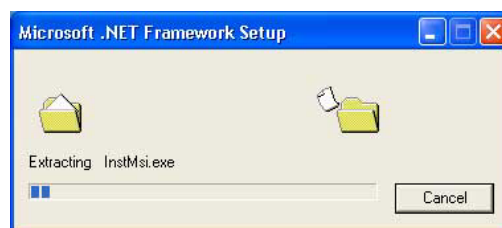
6. Double-click the dotnetfx.exe file.
 - The Run dialog box reappears displaying the file selected in the Open field.



7. Click OK
 - A message appears asking if you want to install the .Net Framework.



8. Click Yes.
 - The Microsoft .NET Framework Setup window appears. Please be patient as the setup initialization may take a few moments.

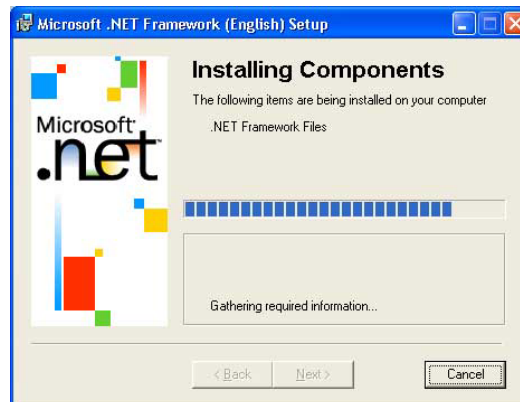


- When the initialization is complete, the .NET Framework Wizard appears. This wizard will guide you through the setup process.



9. Click Next to begin installing the Microsoft .NET Framework.

- The Installing Components screen appears. Please be patient as the installation may take a few minutes.



- When the Installation is complete, a completion message appears.



10. Click OK to confirm the completion message.

- The Microsoft .NET Framework has now been installed. You are now ready to move on to the installation of the Medi-Gate Integrator™.
- To install the Medi-Gate Integrator,™ see the Install the Medi-Gate Integrator™ section.