

SUBJECT: Running Import Wizard

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NOTE: *We are providing this TechNote as a courtesy to our customers to assist them in understanding and troubleshooting their system problems. The following suggestions are provided for your consideration as actions you may choose to take to correct current or future problems. If you are not familiar with the procedures described in the TechNote, contact your hardware system vendor, software support vendor, or local computer service or networking service vendor. **YOU SHOULD ALWAYS MAKE A BACKUP OF YOUR DATA JUST BEFORE MAKING CHANGES TO YOUR SYSTEM.***

We do not warrant that these suggested changes will correct any particular problem you may be experiencing. We accept no liability whatsoever for any damages of any kind which you may experience in implementing any of these suggestions. Many computer problems are complex by their very nature and may be caused by a variety of factors. If you are not qualified to diagnose and/or perform any of the suggested procedures then please refer all such matters to a qualified technician.

Running Import Wizard

General rules for Import Wizard

1) Always make a local backup of your Medisoft Database just prior to running the Import Wizard. Be sure that you have a backup you can quickly restore if you have any problems while running the Import Wizard.

2) Import Wizard creates unique Medisoft style chart numbers for all patients that are imported and stores any legacy chart numbers from the data being imported in the "Patient ID #2" field in Medisoft. We do this because we cannot guarantee that all chart numbers from the legacy system are unique and often times they are not. Also we have to be able to integrate imported chart numbers to a Medisoft database which already exists and which may contain data and make sure that none are duplicated. Having these legacy chart numbers allows staff members to match up the patient charts in Medisoft to either the legacy database or to physical patient records in the office. It can also be helpful programmatically to Import Wizard in some more complex applications (importing cases for example).

3) Import Wizard handles all dates in the following formats: dd/mm/yyyy, dd/mm/yy and yyyyddmm.

4) Due to customer requests, Import Wizard will import even partial records. The philosophy is that it is easier to delete partial records if you don't want them than to have to completely rekey those records if you want them. If there is for example a comprehensive patient record but for some reason the patient's name was deleted in the legacy system, Import Wizard will populate the legacy chart number to the "Patient ID #2" field in Medisoft (which may identify who the patient is) and create a numeric chart number in Medisoft (since we do not know the patient's name we cannot create a Medisoft chart number).

Rules that are applied when Importing Cases:

1) If the Insurance Carrier ID #1 is missing or invalid then Import Wizard will reject that case transaction.

2) If the Patient Chart Number is missing or invalid then Import Wizard will reject that case transaction. Import Wizard will accept three different types of data for this field: 1) Valid Medisoft Patient Chart Number, 2) Valid Patient Social Security number if entered in Medisoft for that patient or 3) a valid External Chart number used from the external system that was previously imported to Medisoft Patient ID2 using Import Wizard.

3) Providers on case transactions being imported will be matched on Medisoft Provider ID or NPI if the NPI is properly populated in Medisoft.

4) If the Chart Description is missing then Import Wizard use the Carrier #1 Name as the Case Description.

5) If the Guarantor is left blank than the Patient Chart Number will be used.

6) Policy Holder for each insurance added is automatically defaulted to the Patient.

7) Import Wizard automatically checks the "Cross Over" claim box on the second insurance.

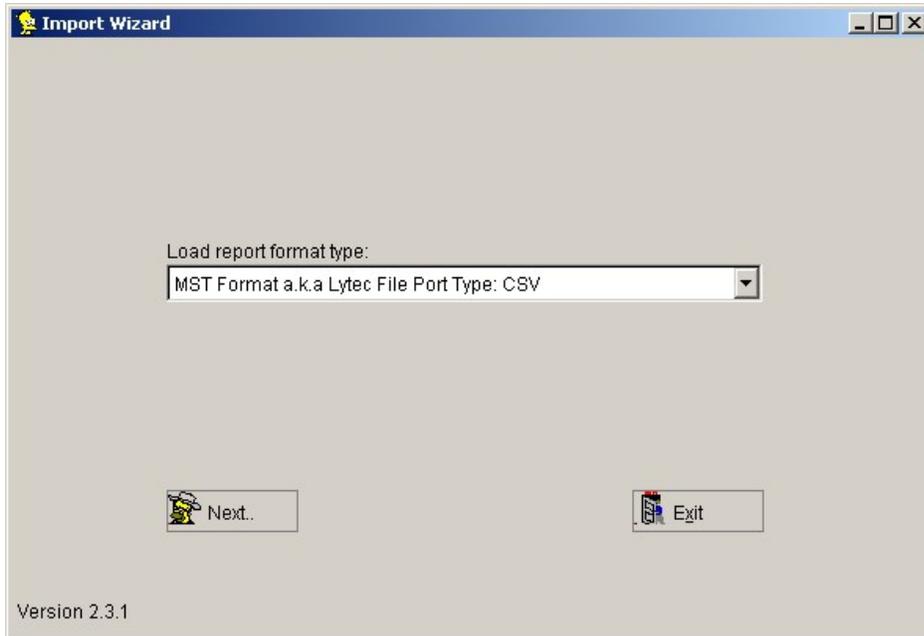
8) If you are not able to create a match to an existing provider ID in Medisoft then you can use the provider ID of "00000" and come back later and select the correct provider. If you do this you must add a provider with a last name of "IWProvider" and a Provider ID of "00000".

9) When importing some types of data the Import Wizard will perform various checks of each record in an effort to prevent the import of duplicate data. The legacy code identifying that record in the legacy database is checked first. If it is a match and confirms that the record is a duplicate from a previous import than all other checks are skipped.

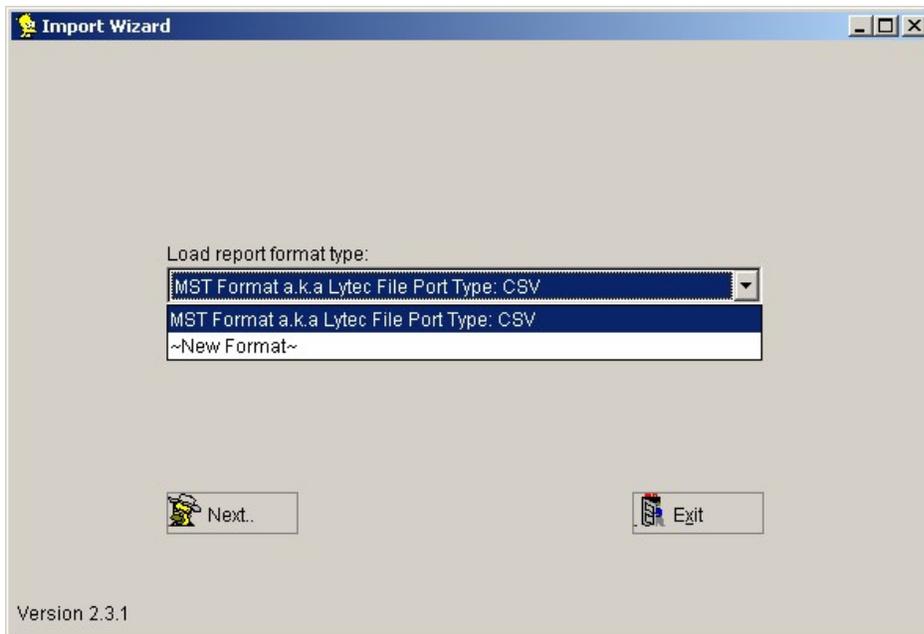
Running the program

Launching the Import wizard takes you to the main screen from which you can select the format type that you will be importing (Medical Software Tools calls this a map). Additional format files (or maps) can be purchased from Medical Software Tools. The Import Wizard can normally be found in the start menu on your computer Start->Program Files->MST Import Wizard.

Here is what the main screen in Import Wizard looks like:



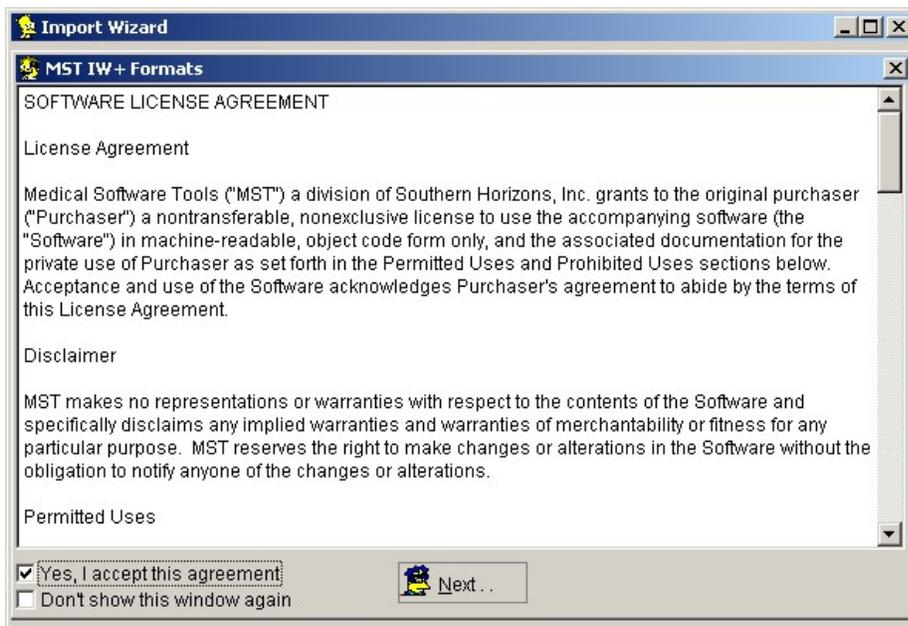
Select the correct format type and click next:



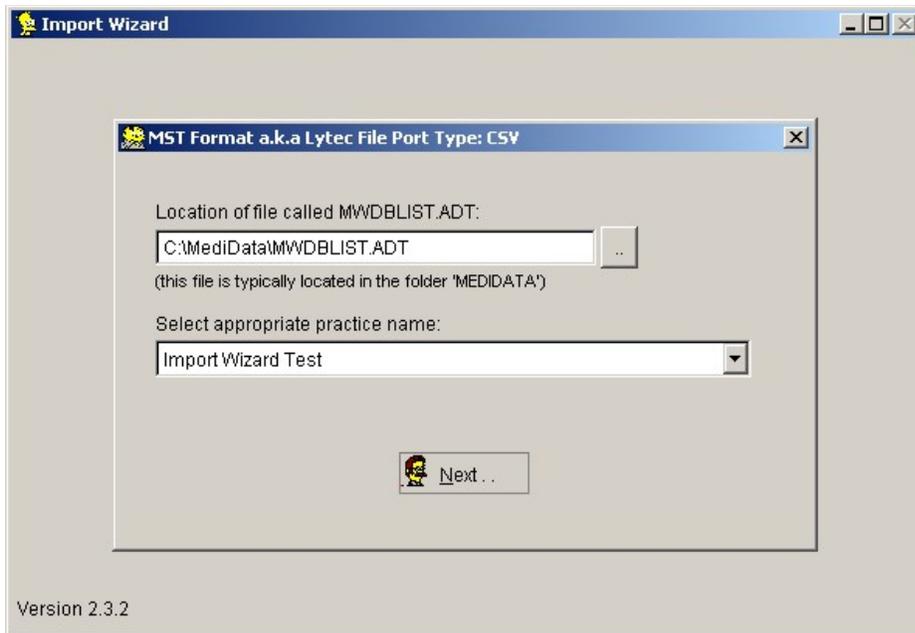
Import Wizard will prompt you for an activation key. You must mail the Product ID displayed by Import Wizard to Support@MedicalSoftwareTools.com. Import Wizard automatically copies the Product ID to your paste buffer so normally you just need to open a new email and click <CTRL><V> to paste the ID into your email.

Please keep in mind that this activation key is generated from an algorithm based on the hardware that you install it on. Please be sure that the computer or workstation that you install Import Wizard on is one that you want to use to do all your imports.

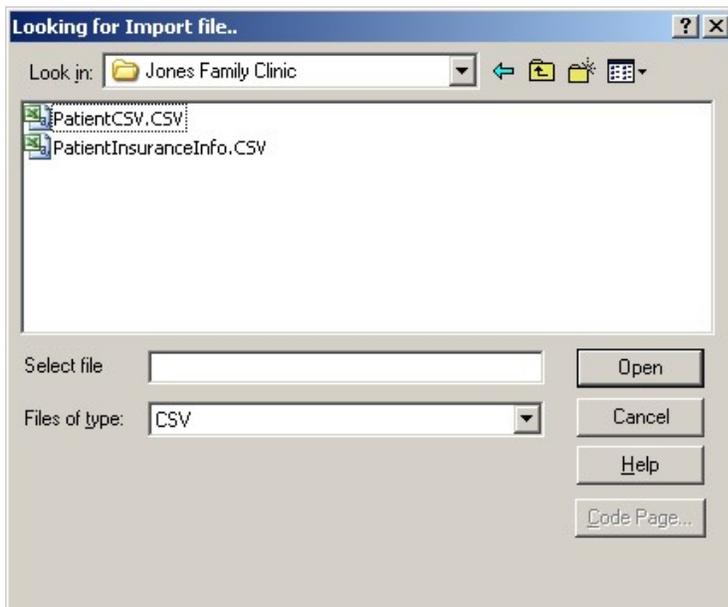
Import Wizard then displays the Software License Agreement. Review this agreement, select “Yes, I accept this agreement” and click the “Next” button to continue.



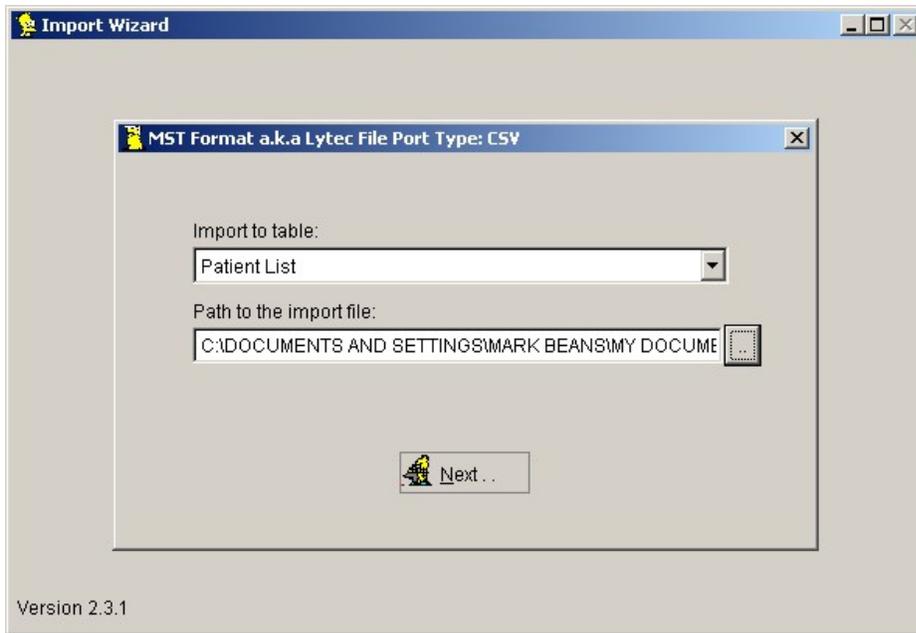
Usually Import Wizard automatically locates your database pointer file (called MWDBList.ADT). Make sure Import Wizard is pointed to the correct database and practice and click “Next”.



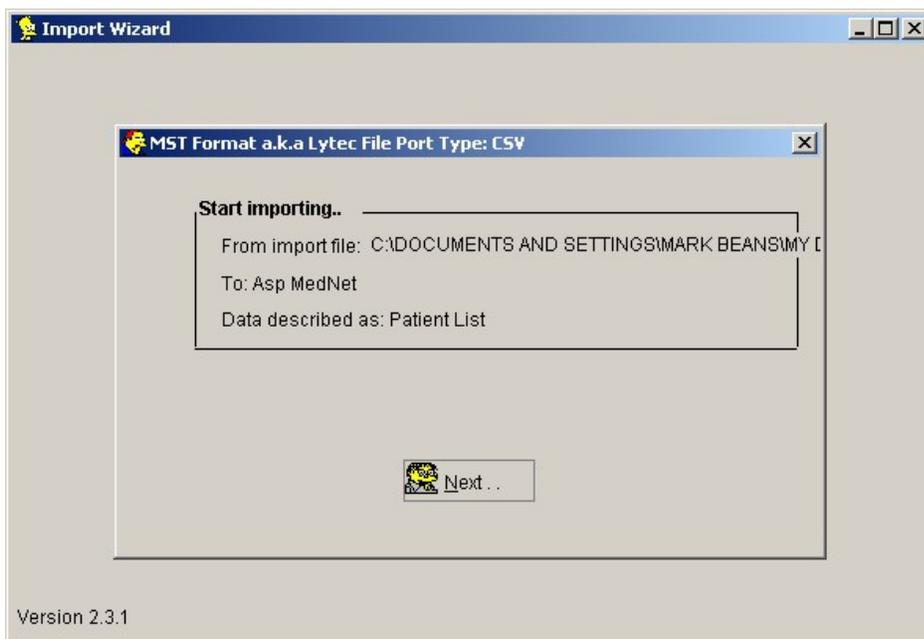
Browse to the location of the file that you wish to Import into Medisoft and click the “Open” button:



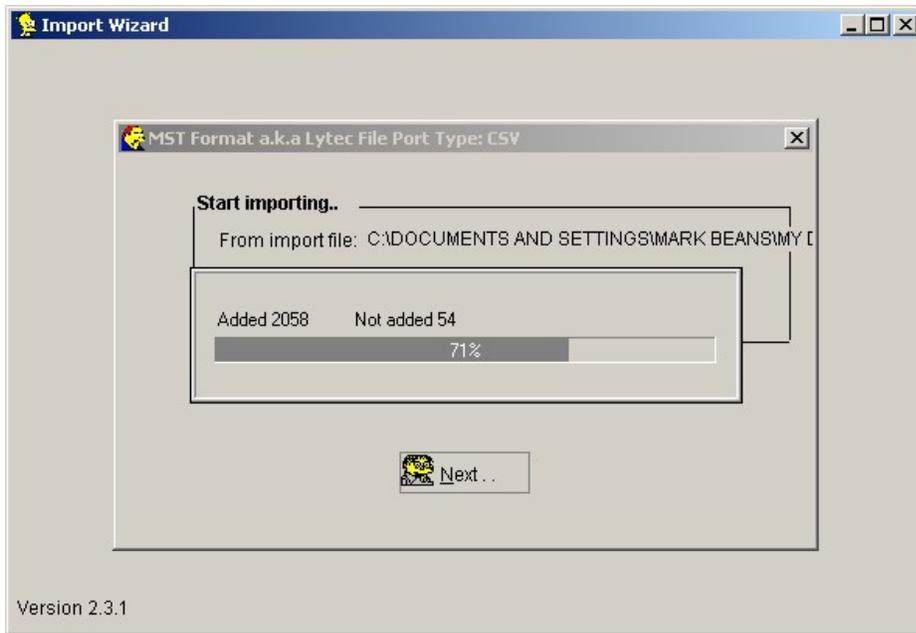
Import Wizard then displays the Medisoft table to import to and the path to the import file. Click “Next”:



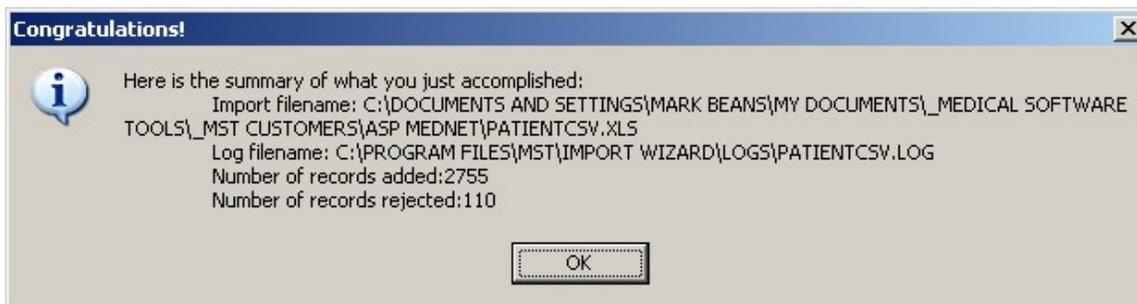
Import Wizard will display a summary screen. Click “Next” to continue:



A progress bar is displayed showing the advancement of the import process:



A summary window will be displayed when the import is completed showing how many records were added to the database and how many records were rejected. Be sure to take note of this information relevant to your billing import, then click “Okay” to continue:



Import Wizard then displays the main screen and you are ready to perform the next import or exit from the software:



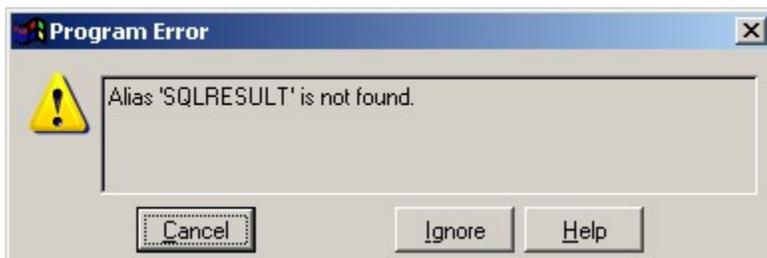
Troubleshooting Import Wizard:

1) Connection handle error

When this error condition occurs Import Wizard will display an error that reads "Connection handle is invalid":



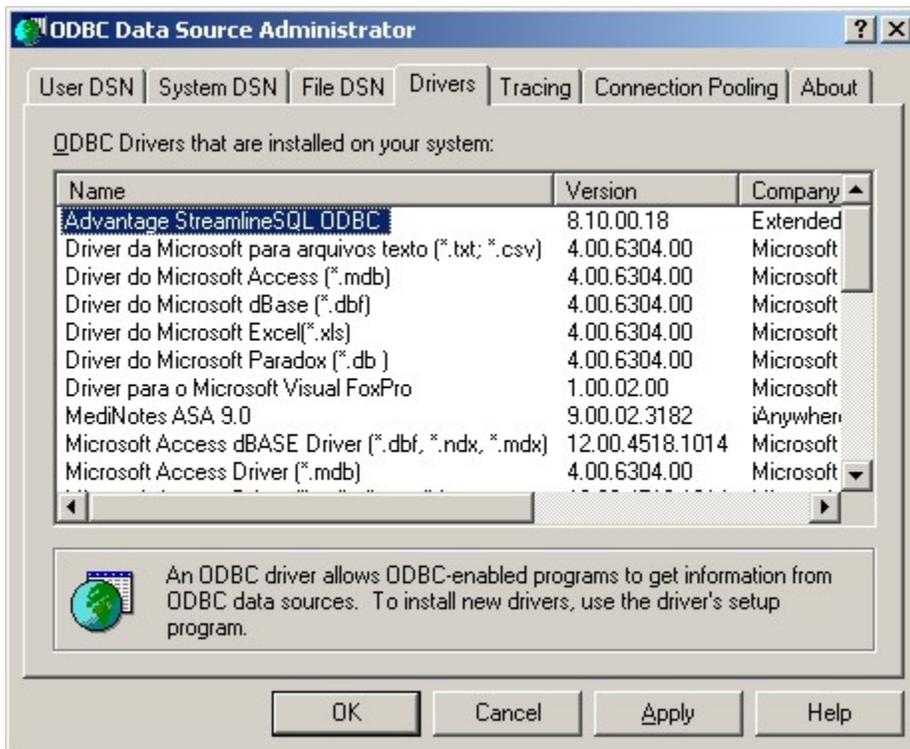
The next error generated looks like this:



The “Connection handle is invalid” generally indicates some problem with the Advantage ODBC driver installed on your local computer. Make sure you that have the latest version of the Advantage ODBC driver installed.

If ODBC problems persist then confirm that The Advantage StreamlineSQL ODBC is the only Advantage ODBC driver that is installed on your system. If you have other versions of ODBC that are not used then try deleting them. Keep in mind that Advantage components are typically backwards compatible so newer version of Advantage tools should work for older versions of Medisoft.

The ODBC Data Source Administrator is found in the control panel under Administrative Tools (Start-> Setting->Control Panel->Administrative Tools). Here is what the Advantage ODBC driver looks like when it is correctly installed:



Technical Support:

If you have technical questions or problems you can email for Support at Support@MedicalSoftwareTools.com. Please be sure to include:

- 1) A detailed description of the error that you are experiencing
- 2) What you were doing when the error occurred
- 3) Screen prints of typical error windows (especially the first and second error messages as additional error messages are usually caused by the first error message).

or call Medical Software Tools at 706-558-9040.

30 days of free telephonic support is included with the purchase of Import Wizard. After the initial 30 days telephonic support will be billed in quarter hour increments. At the time of this writing our base hour of phone support is billed at \$110/hour.