

Chapter 5 - Configuring a Mobile Device

You can configure the following mobile devices with Medisoft: iPad, iPhone, and iPod.

Once a device is configured to work with Medisoft, you can view appointments from your mobile device, as well as enter charges for patients, and update superbill templates.

You will need to download and install the application to your mobile device and then enter the API Key and Code to activate it.

Firewall Considerations

Depending on what firewall you use (other than Windows firewall), you may need to update the exception list or you may need to manually open certain ports. You will not be able to connect to a mobile device until the firewall settings are updated.

If your firewall has an exception list, make sure that the following program is added to the exception list: PlutoServer.MSL.exe.

If your firewall requires you to open ports, make sure the following ports are open:

Port
443 Outgoing
A port in the range 49000-50000 incoming

To determine which incoming port you need to open, follow these steps:

- Click Start, point to All Programs, and click **Diagnose Mobile**. The Diagnose Mobile screen appears. The port that you need to open appears in the External Port field.

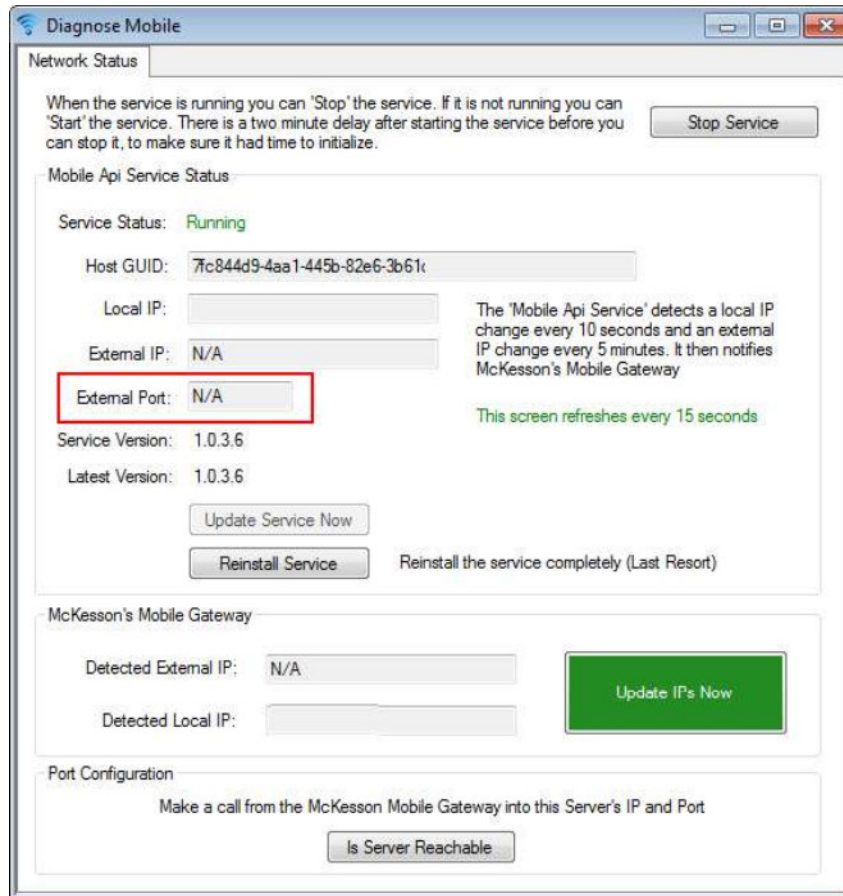


Figure 9. Diagnose Mobile screen with External Port highlighted

Consult the documentation for your firewall for instructions to open a port or add a program to the exception list.

To configure your device

1. Start Medisoft.

2. On the Help menu, click **Mobile**. The Mobile screen appears. By default, only Level 1 users, such as system administrators, have access to mobile functionality. If you do not have Level 1 privileges in Medisoft, see your Medisoft Administrator for access.



Figure 10. Mobile screen

3. Take note of these values on the Mobile screen.
4. With your mobile device, launch the App Store.
5. Search for Medisoft.
6. Download and install the application for Medisoft.
7. On the mobile device desktop, double-tap the mobile application. The application starts.
8. Enter the API Key and API Code that you noted.
9. Tap **Authenticate**. The application will connect to your Medisoft practice data.
10. Log in to your practice using your Medisoft User ID and Password.
11. Create a Mobile Pin number.

This Pin number is an added layer of security to protect your practice data and is stored on the Edit Users screen for each user who accesses your practice using a mobile device. If you forget the number, your system administrator can access it there.

The Mobile Pin number must be four digits.

To add another practice

If you have more than one practice, follow this procedure to add another practice.

1. In Medisoft, log into the practice that you want to access from your mobile device.
2. On the Help menu, click **Mobile**. The Mobile screen appears.
3. Take note of the API Key and API Code. These will be different for each practice.
4. From the mobile device, double-tap the mobile application.
5. Tap the current practice name.
6. Tap +.
7. Enter the API Key and Code that you noted.
8. Tap **Authenticate**.

Troubleshooting

You can test your connection using the Check Access button on the Mobile screen.

To open the Mobile screen:

1. On the Help menu in Medisoft, click **Mobile**. The Mobile screen appears.



Figure 11. Mobile screen

2. Click the **Check Access** button. Connectivity is checked and the status appears.



Figure 12. Mobile screen with connectivity checks

If you receive a Failed on any of the checks, here are some possible solutions:

Connectivity Check	Possible Solutions for a Failed status
<p>Checking connectivity to mobile service</p> <p>If this fails, Medisoft could not connect to the Mobile Service (the application that enables your mobile device to connect to your Medisoft practice data).</p>	<ul style="list-style-type: none"> • Make sure the mobile service is installed on the server. You must have Medisoft Client installed on the server if you want the mobile service installed there as well. • The mobile service is not started. Check your services to make sure it is started.
<p>Checking outgoing connectivity</p> <p>If this fails, the Mobile Service could not connect to the Internet for outgoing data.</p>	<ul style="list-style-type: none"> • Check your network cable and verify that your computer can reach the Internet. • Verify that port 443 is open. Consult the documentation for your firewall to learn how to open these ports, or contact your IT administrator/ • If you continue to experience problems, check your documentation or contact Technical Support.
<p>Checking incoming connectivity</p> <p>If this fails, the Mobile Service could not connect to the Internet for incoming data.</p> <hr/> <p>NOTE: If the check for incoming connectivity fails but the other two checks passed, you can still use a mobile device as long as the mobile device is on the same network as the server.</p> <hr/>	<ul style="list-style-type: none"> • Check your network cable and verify that your computer can reach the Internet. • If you have a firewall other than Windows firewall, verify that the port for incoming data is open (see “Firewall Considerations” on page 19). Consult your IT administrator to open the correct port. • Verify that your router is UPNP enabled. • If you continue to experience problems, check your documentation or contact Technical Support.

Configuring Superbill Templates

Before you start entering charges from your mobile device, configure a template that you will use to display the information you want on the Enter Charges screen.

1. On the mobile device, launch the Medisoft application and log in.

2. Tap **Setup** at the bottom of the screen.

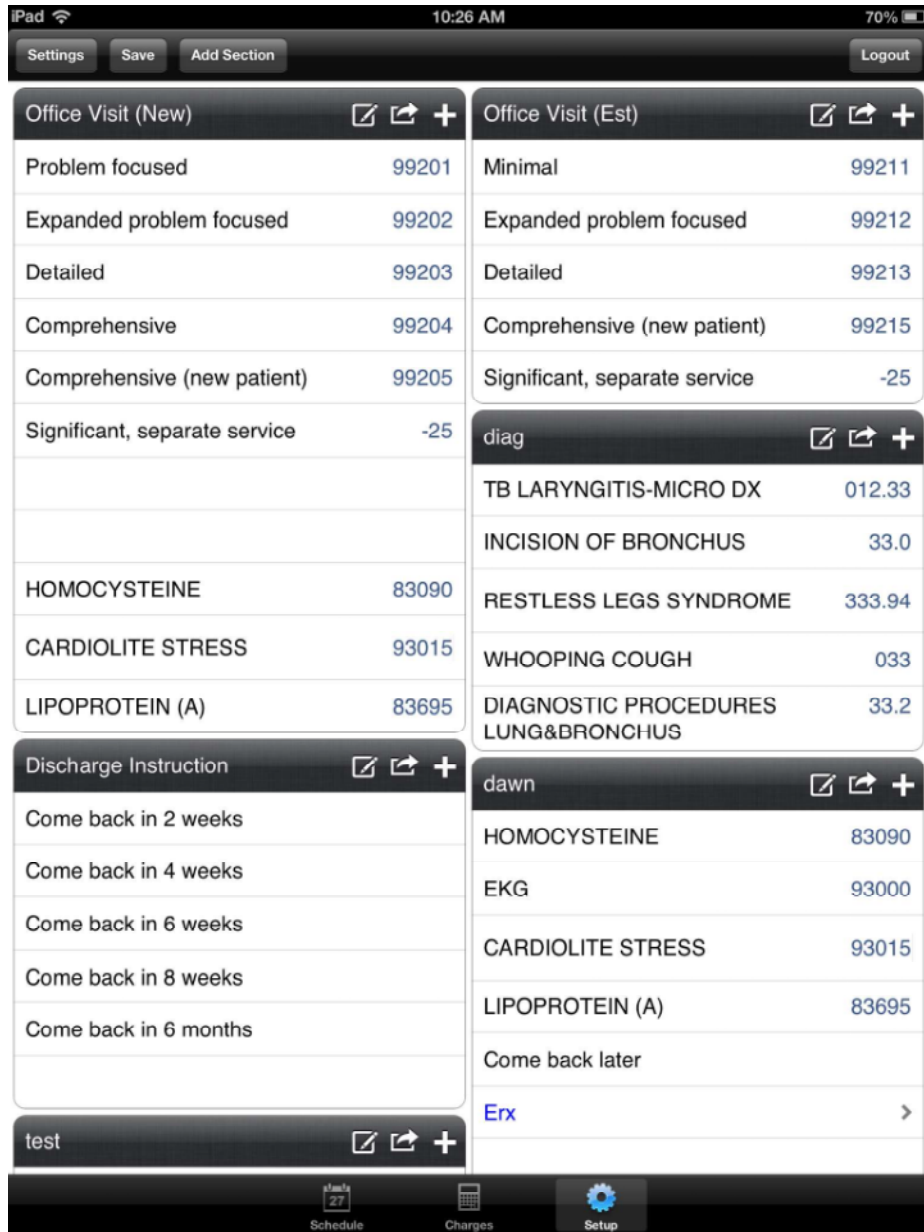


Figure 13. Setup screen

3. Begin setting up your template by adding a section. Double-tap **Add Section** at the top of the screen.

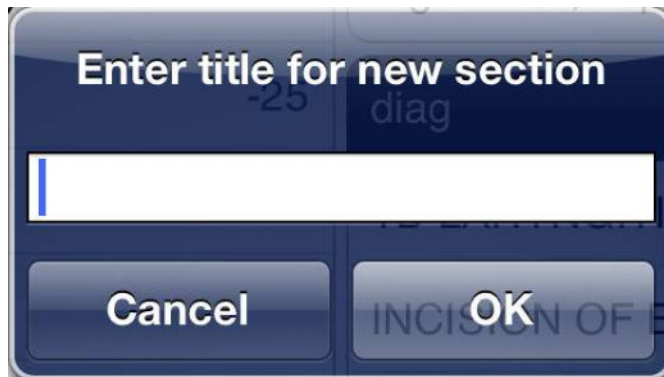


Figure 14. Enter title for new section screen

4. Enter a title for your new section and tap **OK**. The new section appears on the screen.

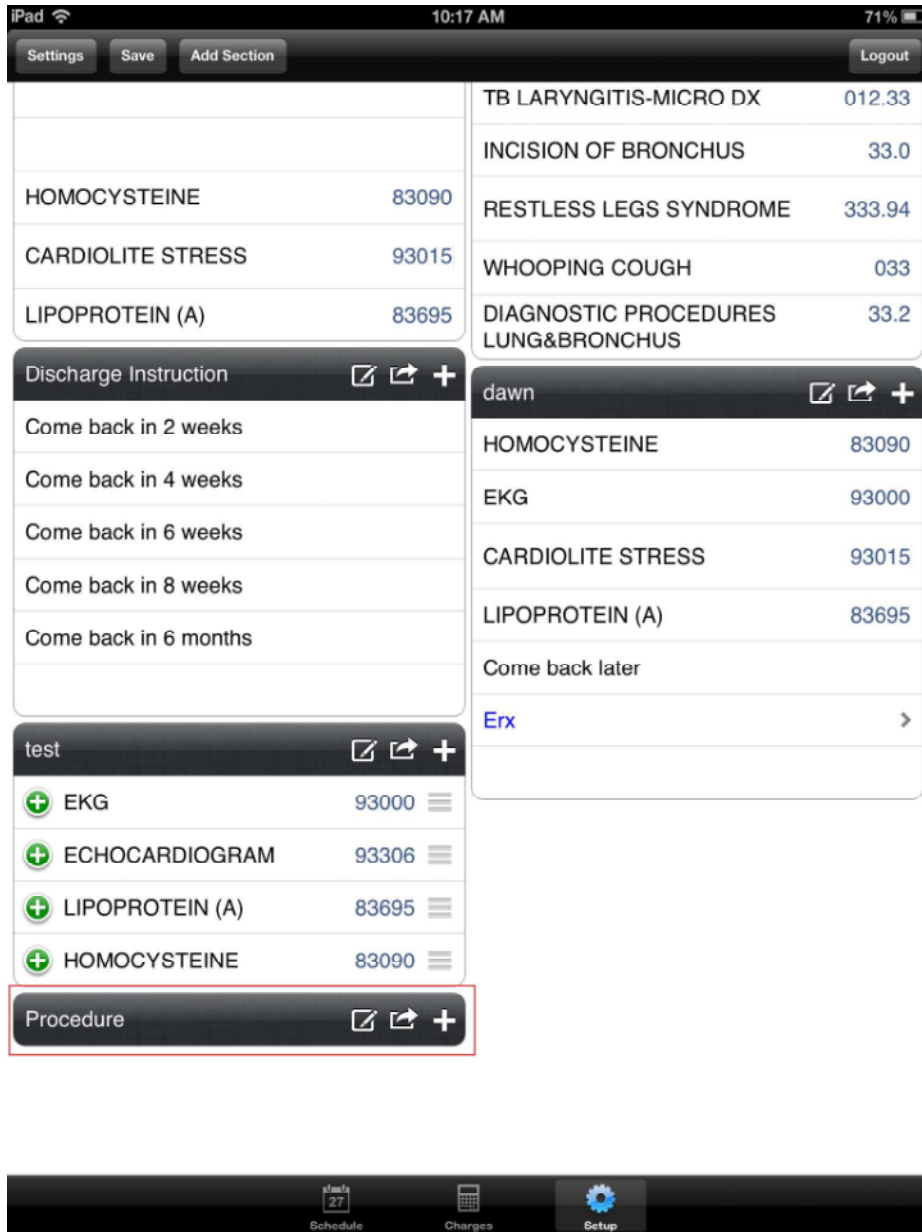


Figure 15. Setup screen with new section highlighted

- Next, add items to the section. To do so, tap the + icon. The Select Field Type menu appears.



Figure 16. Select Field Type menu

- Tap the item you want to add. The Search screen for that type of item appears.



Figure 17. Search Procedure screen

7. Enter characters to search for the item and tap **Search**. The list of item appears.
8. Tap the item you want and tap **Add**. The item appears in your new section.



Figure 18. Procedure screen

9. Continue adding sections and items until your superbill template is complete.
10. Tap **Save** to save the template.
11. You can create additional templates in the same manner. When you save a template in Landscape or Portrait format, it remains in that format and will appear on the screen in that format when you use it to enter charges.