HART INSTALLATION GUIDE

VERSION 1.1.0

JULY 2015

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INTRODUCTION

The 'Hospice Abstraction Reporting Tool' (HART), was developed by the Centers for Medicare & Medicaid Services (CMS).

HART is a Java based Windows application that is free to download and use which provides an option for Hospice providers to collect and maintain facility, patient and HIS Record information for subsequent submission to the appropriate national data repository. HART displays electronic HIS Record forms similar to the paper version of the forms. Once the abstraction is completed, facilities are able to export their data from the application and submit it to the appropriate national data repository.

All HART releases will consist of full "releases" and "upgrades".

All HART releases are developed into two (2) types of application software:

- Standalone Software Application

- Network Client/Server Application

This Guide will be used to install and set up both types of software. A User Guide will also be provided, which covers all the user functionality found in HART, as well as the Help and Security features.

Online Help is provided within the application once successfully logged in. The Help Desk is also available to assist if needed.

The Help Desk is available for technical support and assistance with problems or questions regarding the software.

Contact information for the QIES Help Desk: 1-877-201-4721 or **help@qtso.com**

HARDWARE/SOFTWARE SPECIFICATIONS

The QTSO home page lists the CMS websites for the System Requirements: https://www.qtso.com/index.php

HART 1.1.0 shall support the latest Minimum System Requirements.

SOFTWARE DOWNLOADS

To download the files required for installing the HART software, navigate to the Centers for Medicare & Medicaid Services website or the QIES Technical Support Office (QTSO) website.

The CMS Websites: https://www.qtso.com/cmslinks.html

The QTSO Website: https://www.qtso.com/hart.html

Complete the following steps to download HART from the QTSO Website:

Enter the QTSO Website: https://www.qtso.com/hart.html into your URL (address bar), to display the website.

1. The HART download page displays.

HART Downloads/Documentation	File Name
Alert for HART Client/Server users! All users who are utilizing the client/server option must upgrade ALL HART Client installations to the latest version before logging in. Failure to do so will result in a corrupt database and loss of patient information. **HART 1.1.0** (posted MM/DD/2015) NEW A production version of HART software (Version 1.1.0) is now available to download. To install HART, read and follow the **HART 1.1.0 Installation Guide**. HART 1.1.0 includes the following updates: • 1.01.0 Data Specs • Home Screen • Import/Export fixes • Report Fixes • Windows 8 Support • Help Text Updates • Software disclaimer **Please refer to the HART User Guide for further information regarding using the application.**	**Attention! NEW HART Client Server Users only.** See New_Client_Users_ONLY_Readme_Text for server installation instructions. Warning! DO NOT install the upgrade to the server install, doing so will DELETE data. Only NEW client server users should install HART 1.0 Server executable. **Alert for HART Client/Server users!** All users who are utilizing the client/server option must upgrade ALL HART Client installations to the latest version before logging in. Failure to do so will result in a corrupt database and loss of patient information. HART User Guide HART 1.1.0 User Guide(PDF 3.18 MB) HART Installation Guide HART 1.1.0 Installation Guide(PDF 1.1 MB) HART Install File (this install contains the stand-alone and client version of HART) Standalone readme text (2 KB) HARTSetup-1.1.0.exe (158 MB) Note: Please continue to regularly check the QTSO Web site for software updates or additional information. Server Installation Instructions (The server Install is needed to connect multiple client computers to a centralized server) New_Client_Server_Users_ONLY_Readme_Text.txt (2 KB)

2. Along the left-hand column, titled 'HART Downloads/Documentation', review the description as follows:
   a. "HART 1.1.0 (posted MM/DD/2015) NEW
   A production version of HART software (Version 1.1.0) is now available to download.
   To install HART, read and follow the HART 1.1.0 Installation Guide.
   Please refer to the HART User Guide for further information regarding using the application."

```
HART Downloads/Documentation

Alert for HART Client/Server users!
All users who are utilizing the client/server option must upgrade ALL HART Client installations to the latest
version before logging in. Failure to do so will result in a corrupt database and loss of patient information.


HART 1.1.0 (posted MM/DD/2015) NEW

A production version of HART software (Version 1.1.0) is now available to download.

To install HART, read and follow the HART 1.1.0 Installation Guide.

HART 1.1.0 includes the following updates:

    • 1.01.0 Data Specs
    • Home Screen
    • Import/Export fixes
    • Report Fixes
    • Windows 8 Support
    • Help Text Updates
    • Software disclaimer


Please refer to the HART User Guide for further information regarding using the application.
```

3. Along the right-hand side, titled 'File Name', select the version needed for downloading the software.
   a. File Name
      HART User Guide
      HART_UserGuide_1.1.0 (PDF 3.18 MB)

      HART Installation Guide
      HART_InstallationGuide_1.1.0 (PDF 1.1 MB)

      HART Install File (this install contains the stand-alone and client version of HART)
      Standalone readme text (2 KB)
      HART Setup-1.1.0.exe (158 MB)
      Note: Please continue to regularly check the QTSO Web site for software updates or
      additional information.

      Server Install Instructions (The server install is needed to connect multiple client
      computers to a centralized server)

      New_Client_Server_Users_ONLY_Readme_Text.txt(2 KB)

File Name
Attention! NEW HART Client Server Users only. See New_Client_Users_ONLY_Readme_Text for server installation instructions. **Warning!** DO NOT install the upgrade to the server install, doing so will DELETE data. Only NEW client server users should install HART 1.0 Server executable. **Alert for HART Client/Server users!** All users who are utilizing the client/server option must upgrade ALL HART Client installations to the latest version before logging in. Failure to do so will result in a corrupt database and loss of patient information. HART User Guide HART 1.1.0 User Guide(PDF 3.18 MB) HART Installation Guide HART 1.1.0 Installation Guide(PDF 1.1 MB) HART Install File (this install contains the stand-alone and client version of HART) Standalone readme text (2 KB) HARTSetup-1.1.0.exe (158 MB) Note: Please continue to regularly check the QTSO Web site for software updates or additional information. Server Installation Instructions (The server Install is needed to connect multiple client computers to a centralized server) New_Client_Server_Users_ONLY_Readme_Text.txt (2 KB)

4. Click on the setup file required.
5. The File Download window will display.
6. Click 'Run'.
7. The progress bar will illustrate the progress of the install.
8. The Icons for the Application AND the User Guide will appear on the desktop.

INSTALLATION GUIDE – GENERAL OVERVIEW

INSTALLERS ACCESS RIGHTS

To install HART, the user must be logged into the PC as a Workstation Administrator.

Users of the application must have read/write access to the location where the database is installed.

TYPES OF INSTALLATIONS

There are two types of installations available for HART.

- The Network Client/Server install, which uses a server to support one or more individual workstations all accessing one database by multiple computers and users.

  o Servers hold the central database and must be installed using the Server Install first.

  o Clients are individual workstations that have access to the server. This is installed after the Server Installation has been successfully completed.

- The Standalone install, which is self-contained on one workstation.

Examples are shown in the Software Downloads section of this document.

NOTE: The Client and the Standalone installs use the same install file (.exe). There is a point in the process where the user must select one or the other: Standalone or Client.

SERVER INSTALLATION

The database, which the clients will connect to, must be installed first using the Server installation.

TIP: When selecting the Network Client/Server install, it is strongly recommended that the Server and the Client installations be performed on different workstations for ease of recovery.

CLIENT AND STANDALONE INSTALLATION – THE 'INSTALLER'

WINDOW SETTINGS

In order to ensure the reliable operation of the software, it is imperative that the following Windows properties be set.

Using the Microsoft Windows Operating Systems, which are supported, the Windows Font Size property must be set to "Small Fonts". This property can be found under the Settings tab of desktop properties:

Control Panel\Appearance and Personalization\Display\.

SERVER INSTALLATION

On the database server, complete the following steps to install. To download the appropriate files, see the Software Downloads section.

1. Click on the Server Setup. File name 'HARTServerSetup-1.0.exe.'

   a. The File Download – Security Warning screen displays. Click 'Run' to start the installation.

NOTE: Click 'Save' to save the installation file to the workstation for installation at a later time. If installation files are saved to the workstation, double click the installation icon to start the installation.

2. The "Setup is loading" message displays.

Please wait while Setup is loading...

verifying installer: 18%
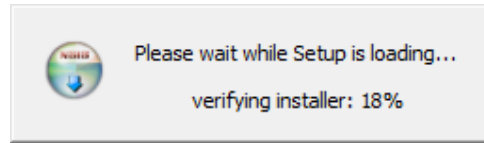
3. The 'Welcome to the HART MySQL Server 1.0 Setup Wizard' displays when the load is finished. This wizard will guide you through the installation of HART MySQL Server 1.0. It is recommended that you close all other applications before starting setup. This will make it possible to update relevant system files without having to reboot your computer.


4. Click 'Next' to continue with the setup.

5. The License Agreement screen displays. Please review the license terms before installing HART MySQL Server 1.0.

    a. "To the maximum extent permitted by applicable law, CMS and its contractors/distributors make no representations about the suitability, for any purpose or use, of the software and documents. THE SOFTWARE AND DOCUMENTS ARE PROVIDED "AS IS" AND WITHOUT WARRANTY OF ANY KIND. ANY WARRANTIES, INCLUDING IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR USE, TITLE, AND NON-INFRINGEMENT ARE HEREBY DISCLAIMED. Recipient shall not, in any event, be entitled to, and CMS or contractors/distributors shall not be liable for indirect, special, incidental, or consequential damages of any nature including, without being limited to, loss of use, data, or profit irrespective of the nature of the claim, whether in contract, tort, warranty, or otherwise."

6. If you accept the terms of the agreement, Click 'I Agree' to continue with the setup. You must accept the agreement to install HART MySQL Server 1.0.
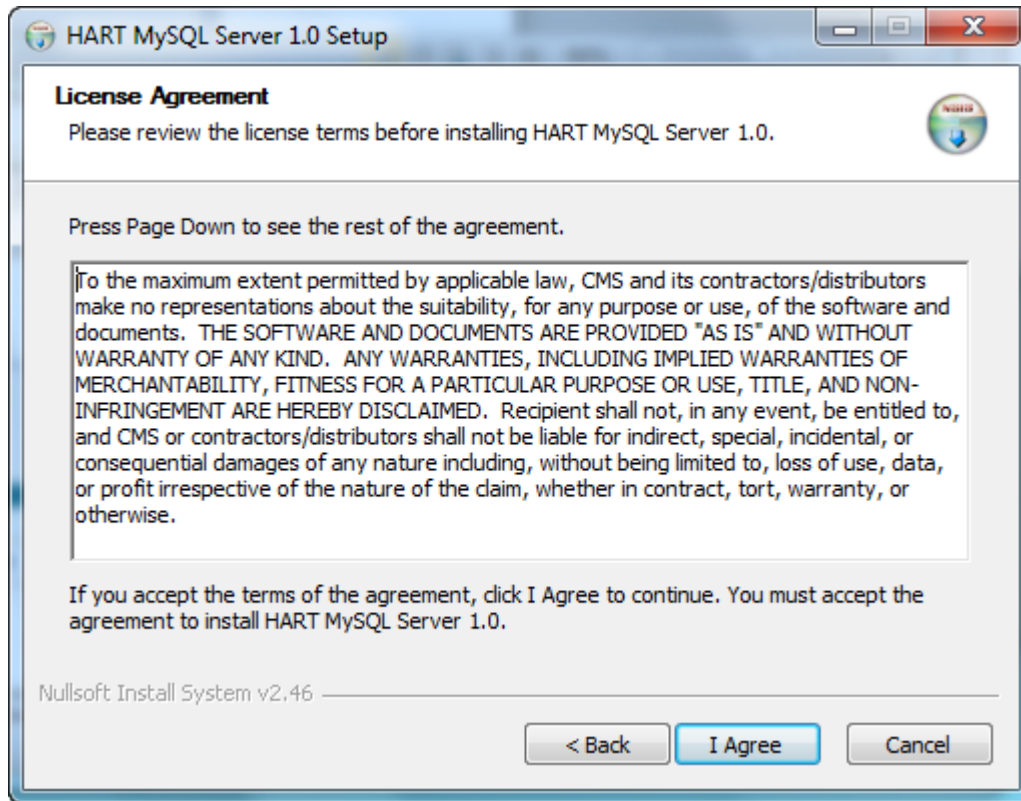
7. The 'Choose Installation Location' screen displays. Choose the folder in which to install HART MySQL Server 1.0. Setup will install HART MySQL Server 1.0 in the selected folder. To install in a different folder, click 'Browse' and select another folder or manually type in the location.
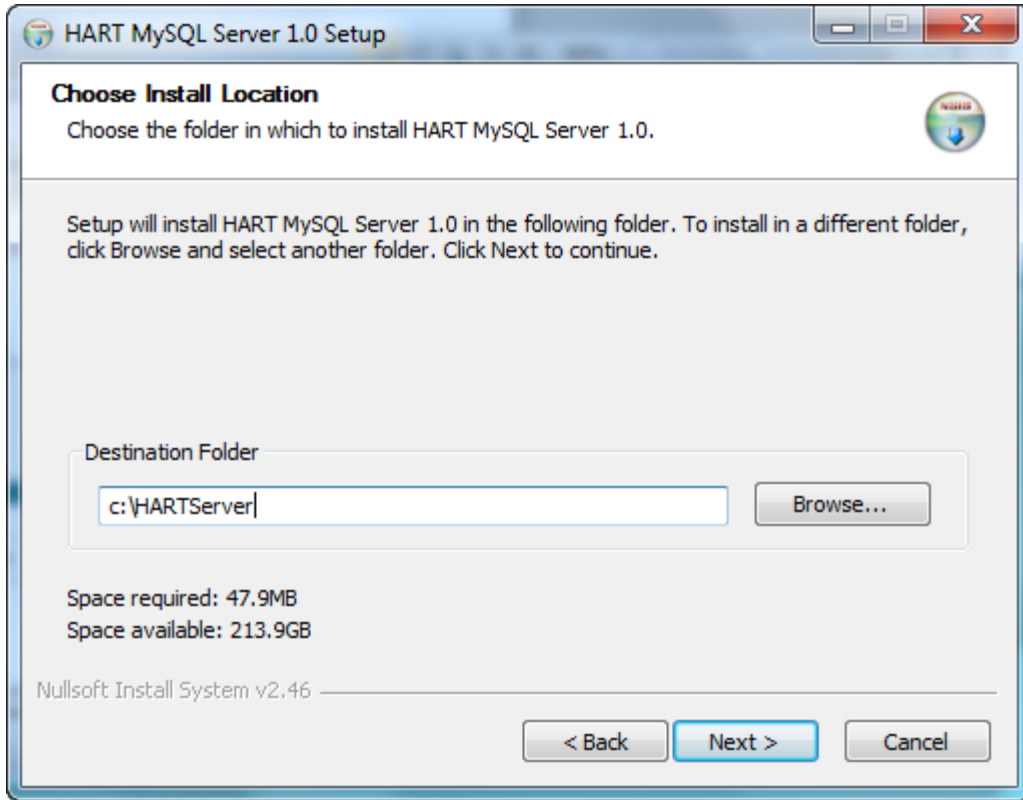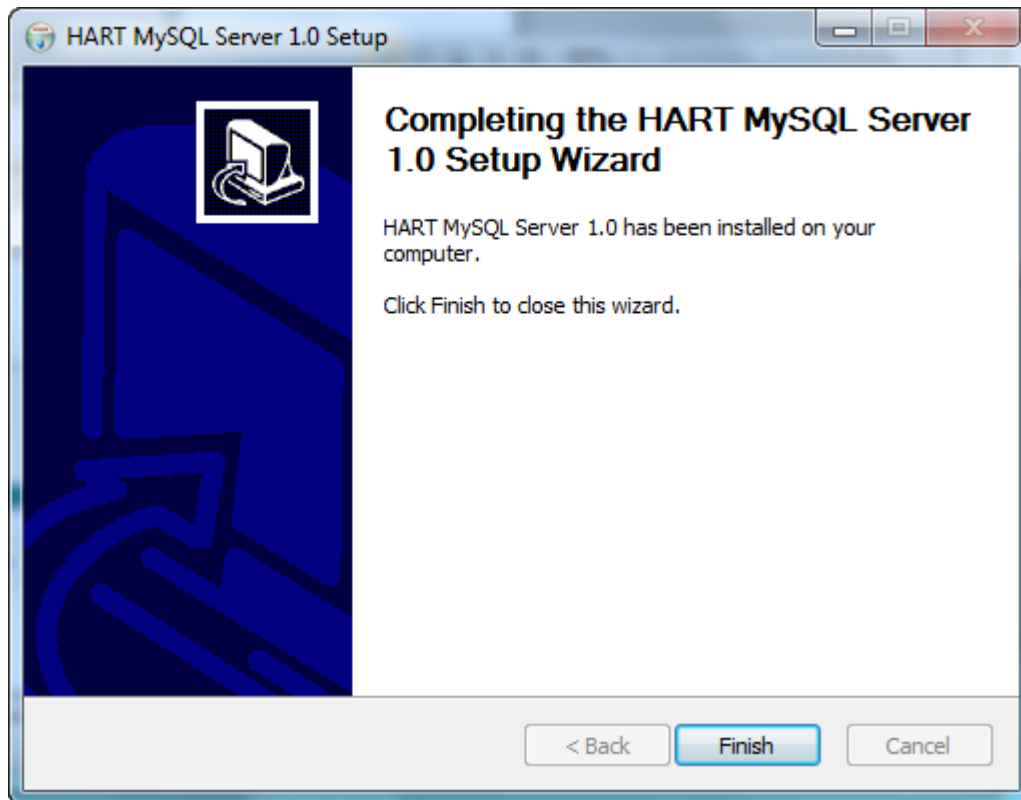
8. Click 'Next' to continue.

    a. The 'Choose Port' screen displays. Enter the port number.   The default port number is 3730.
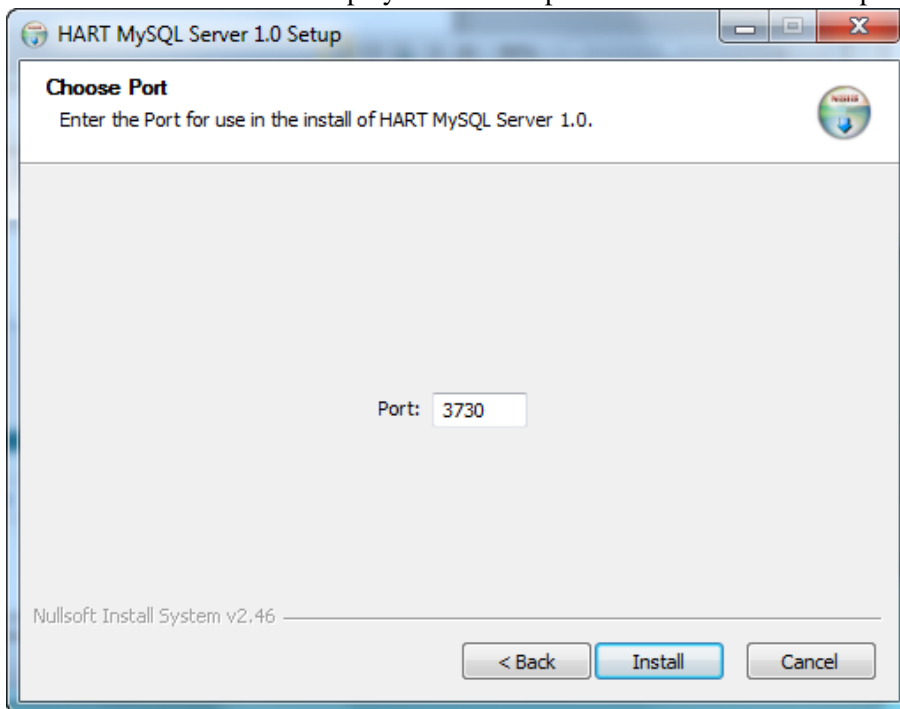
9. Click 'Install' to begin the installation.

10. A progress bar on the Installing screen allows the user to monitor the progress.

11. The 'Completing the HART MySQL Server 1.0 Setup Wizard' displays.

12. Click Finish to complete this portion of the installation process.

NOTE: There are no Desktop icons for the Server or the User Guide at the end of the Server Installation. The Client Installation must be run before your entire Installation process is complete.

13. Go to the Standalone & Client Installation section.

STANDALONE & CLIENT INSTALLATION

INSTALL THE SOFTWARE

Complete the following steps to install HART 1.1.0 Standalone or Client version.

1. Double click on the appropriate Setup executable (filename extension = .exe): 'HARTSetup-1.1.0.exe'

2. Click on Run.

3. The Setup message displays and will continuously update with the progress of the download.

4. The setup completes and the 'Welcome to the HART 1.1.0 Setup Wizard' screen displays. This wizard will guide you through the installation of HART 1.1.0. It is recommended that you close all other

applications before starting setup. This will make it possible to update relevant system files without having to reboot your computer.
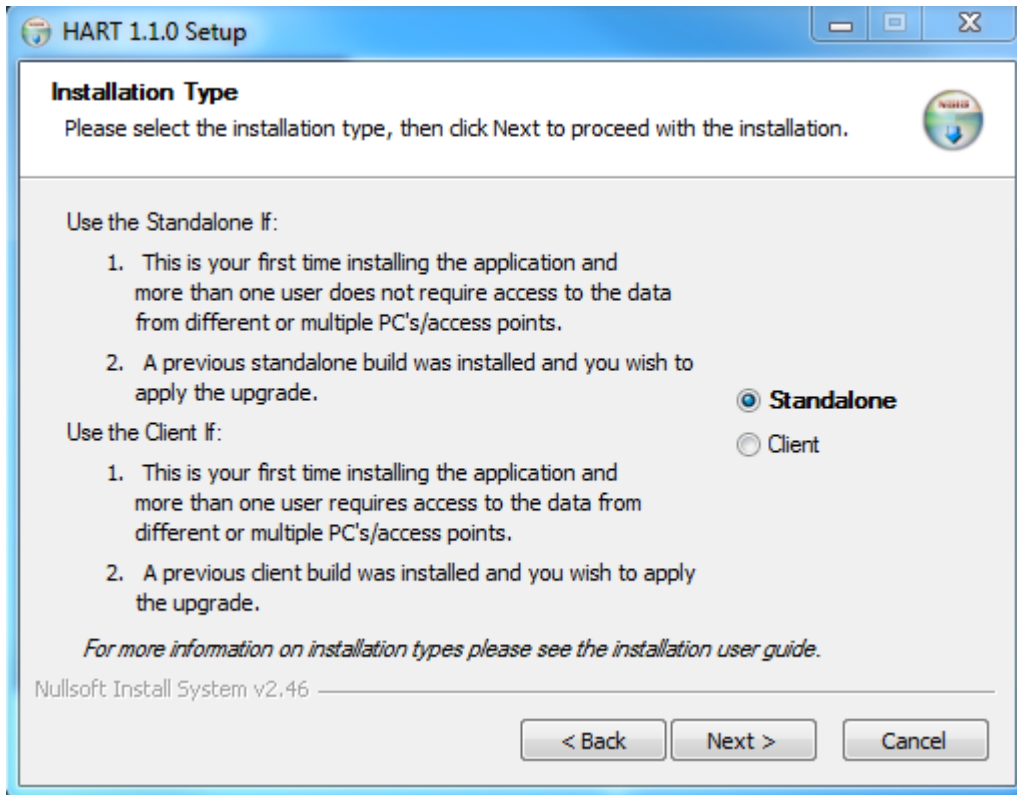

5. Click 'Next' to continue.

6. The License Agreement screen displays. Please review the license terms before installing HART 1.1.0.

    a. "To the maximum extent permitted by applicable law, CMS and its contractors/distributors make no representations about the suitability, for any purpose or use, of the software and documents. THE SOFTWARE AND DOCUMENTS ARE PROVIDED "AS IS" AND WITHOUT WARRANTY OF ANY KIND. ANY WARRANTIES, INCLUDING IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR USE, TITLE, AND NON-INFRINGEMENT ARE HEREBY DISCLAIMED. Recipient shall not, in any event, be entitled to, and CMS or contractors/distributors shall not be liable for indirect, special, incidental, or consequential damages of any nature including, without being limited to, loss of use, data, or profit irrespective of the nature of the claim, whether in contract, tort, warranty, or otherwise."

HART 1.1.0 Setup

License Agreement
Please review the license terms before installing HART 1.1.0.

Press Page Down to see the rest of the agreement.

CMS and its contractors/distributors make no representations about the suitability, for any purpose or use, of the software and documents. THE SOFTWARE AND DOCUMENTS ARE PROVIDED "AS IS" AND WITHOUT WARRANTY OF ANY KIND. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, CMS AND ITS CONTRACTORS/DISTRIBUTORS HEREBY DISCLAIM ANY AND ALL WARRANTIES, INCLUDING IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR USE, TITLE, AND NON-INFRINGEMENT. Recipient shall not, in any event, be entitled to, and CMS or contractors/distributors shall not be liable for, indirect, special, incidental, or consequential damages of any nature, including, without being limited to, loss of use, data, or profit, irrespective of the nature of the claim, whether in contract, tort, warranty, or otherwise.

If you accept the terms of the agreement, click I Agree to continue. You must accept the agreement to install HART 1.1.0.

Nullsoft Install System v2.46

< Back   I Agree   Cancel

7. If you accept the terms of the agreement, click 'I Agree' to continue. You must accept the agreement to install HART 1.1.0.

8. The 'Installation Type' screen displays.

9. Select the type of installation required:

    a. Use the Standalone if:

        i. "This is your first time installing the application and more than one user does not require access to the data from different or multiple PC's/access points."

        ii. "A previous standalone build was installed and you wish to apply the upgrade."

HART 1.1.0 Setup

Installation Type
Please select the installation type, then click Next to proceed with the installation.

Use the Standalone If:

1. This is your first time installing the application and more than one user does not require access to the data from different or multiple PC's/access points.

2. A previous standalone build was installed and you wish to apply the upgrade.

Use the Client If:

1. This is your first time installing the application and more than one user requires access to the data from different or multiple PC's/access points.

2. A previous client build was installed and you wish to apply the upgrade.

For more information on installation types please see the installation user guide.

◉ **Standalone**

○ Client

Nullsoft Install System v2.46

[< Back] [Next >] [Cancel]

b. Use the Client if:
   i. "This is your first time installing the application and more than one user does not require access to the data from different or multiple PC's/access points."
   ii. "A previous client build was installed and you wish to apply the upgrade."
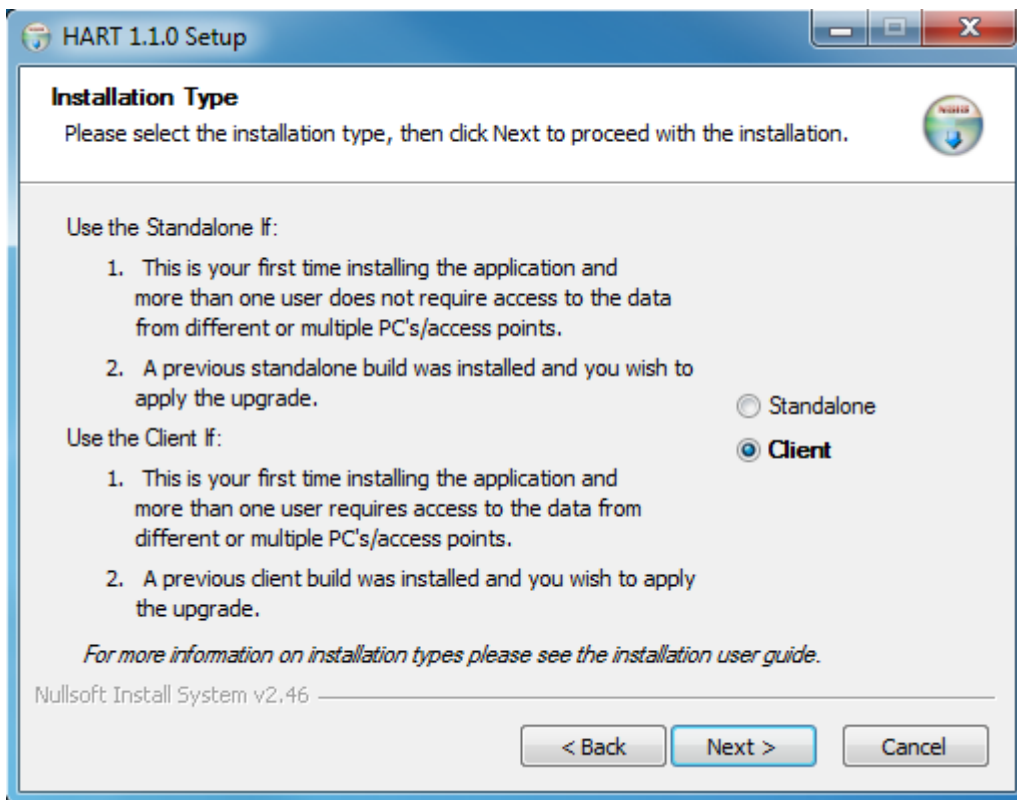
10. Click 'Next'.

11. The 'Choose Installation Location' screen displays. Choose the folder in which to install HART 1.1.0. Setup will install HART 1.0.1 in the selected folder. To install in a different folder, click 'Browse' and select another folder or manually type in the location.

    a. Standalone default will be:

        i. C:\HART
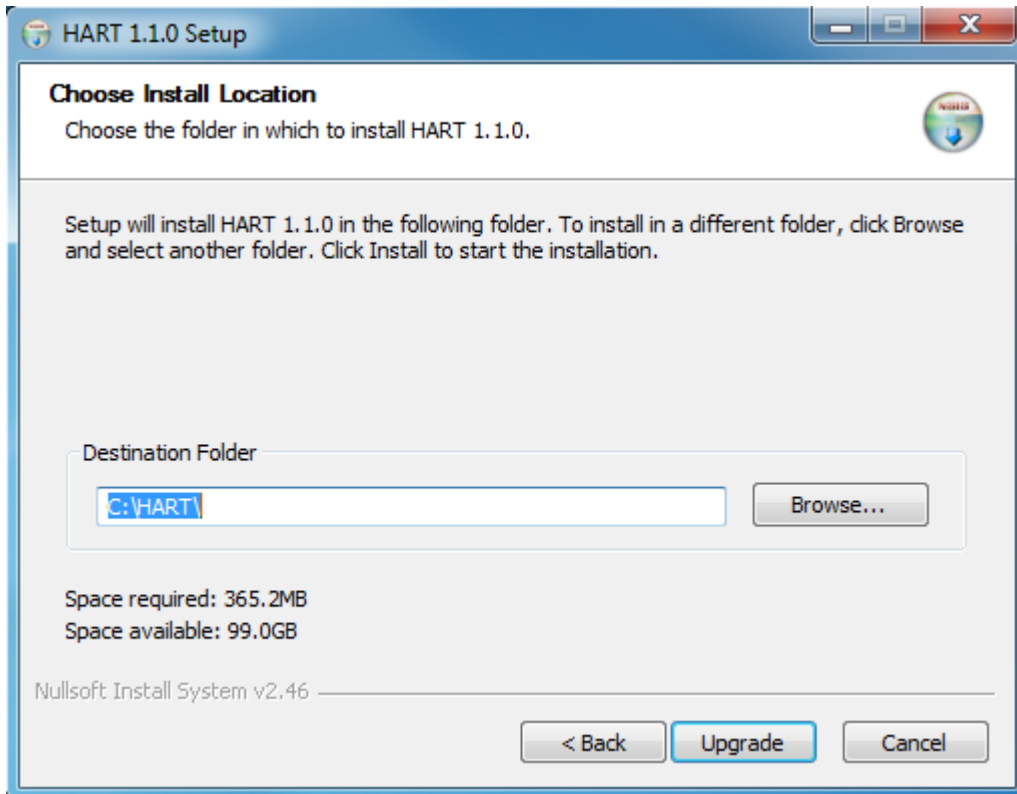
    b. Client default will be:

        i. C:\HARTClient

12. Click 'Install' or 'Upgrade' to start the installation.

NOTE: The install process itself determines whether this is a full install or an upgrade to the software that is already on the workstation. This is seen in the action buttons of the Setup Wizard.

13. The 'Installing' screen displays. A progress bar on this screen allows the user to monitor the progress.

14. When the install is complete, the 'Completing the HART 1.1.0 Setup Wizard' displays.

    a. Standalone Completion screen with 'Run' checked will auto-launch the application.
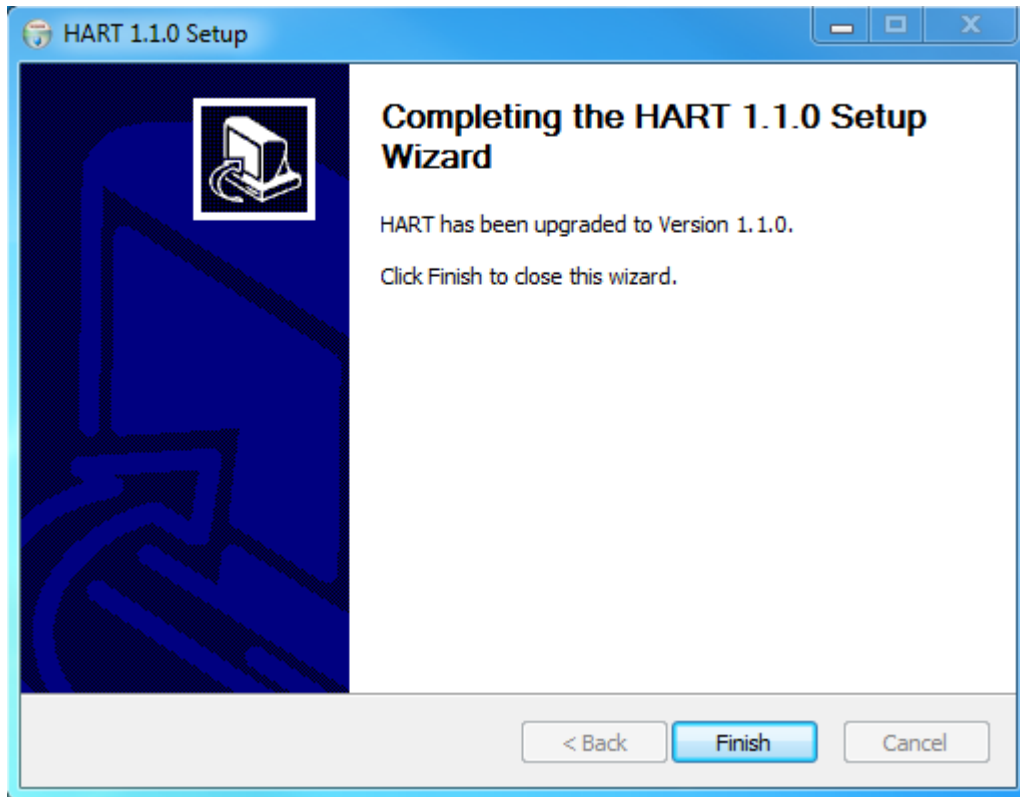
      b.   Client Completion screen, this will NOT auto-launch the application.

15. Click 'Finish' to complete the installation process.

DESKTOP ICONS

When the installation process is complete, the appropriate icon will be available on the Desktop, depending on which installation has been performed.

The HART User Guide icon will also be placed on the Desktop.

The user signing into the software, for the initial Setup, will be referred to as the "default user". They will be required to set up at least one Facility and one System Administrator within the database before any other processing is allowed.

DEFAULT PASSWORD

The default User ID/Password will be the HART's lower-case acronym. They are case sensitive.

- HART User ID : hart
- Initial HART Password: hart

The following steps are required to be completed to initialize the software. The User must complete the initial setup as the default user.

1. The application may be opened by double-clicking on the HART/HART Client icon.
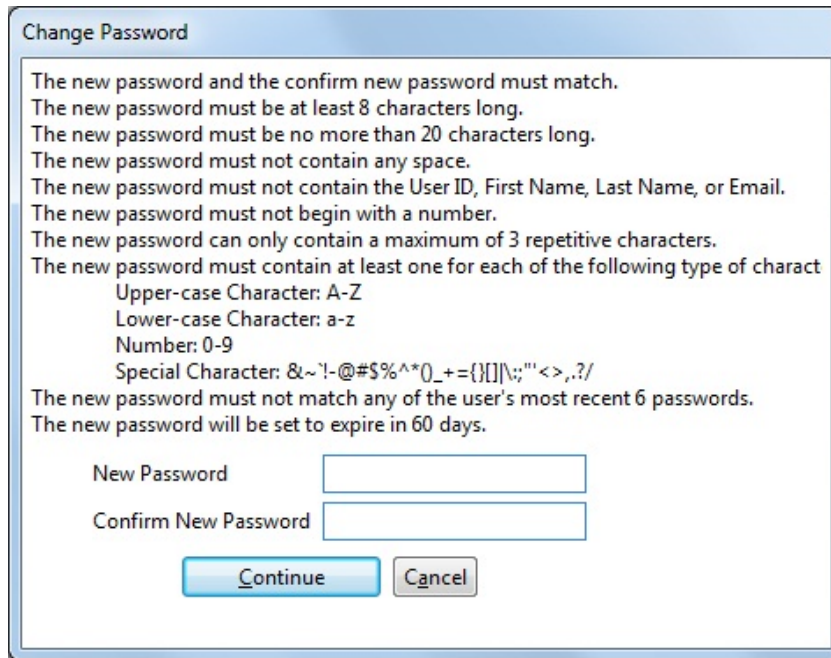2. The HART splash screen displays momentarily.
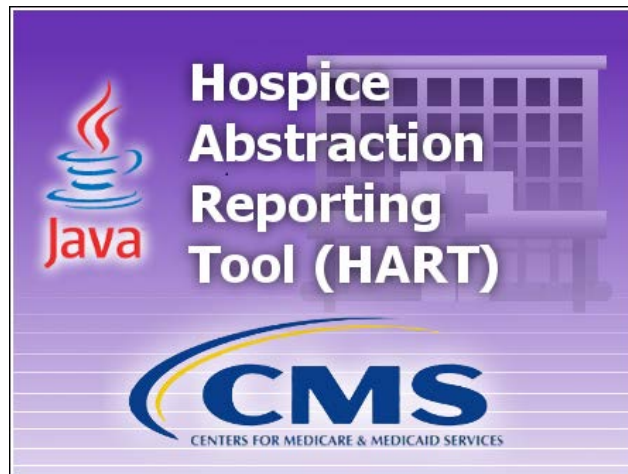
NOTE: Firewall Settings: If the HART client is unable to connect to the database server please contact your IT System Administrator. It is likely that a firewall setting is blocking the connection. If connection problems continue please contact the QIES Help Desk.

3. The Login pop-up window is displayed.

```
HART - 1.1.0 Login

    User ID    [                    ]
    Password   [                    ]
        [ Login ]  [ Cancel ]  [ Forgot Password ]
              ☑ Enable Accessibility Features
```

a. Enter the default User ID and enter the default Password. See Default Password above.

b. Click 'Login'.

c. The Change Password screen displays and displays the password rules as follows:

     i.   The new password and the confirm new password must match.
    ii.   The new password must be at least 8 characters long.
   iii.   The new password must be no more than 20 characters long.
   iv.   The new password must not contain any space.
    v.   The new password must not contain the User ID, First Name, Last Name, or Email.
   vi.   The new password must not begin with a number.
  vii.   The new password can only contain a maximum of 3 repetitive characters.
 viii.   The new password must contain at least one for each of the following type of characters:

        1. Upper-case Character: A-Z
        2. Lower-case Character: a-z
        3. Number: 0-9
        4. Special Character: &~`!-@#$%^*()_+={}[]|\:;"'<>,.?/

   ix.   The new password must not match any of the user's most recent 6 passwords.
    x.   The new password will be set to expire in 60 days.

Change Password

The new password and the confirm new password must match.
The new password must be at least 8 characters long.
The new password must be no more than 20 characters long.
The new password must not contain any space.
The new password must not contain the User ID, First Name, Last Name, or Email.
The new password must not begin with a number.
The new password can only contain a maximum of 3 repetitive characters.
The new password must contain at least one for each of the following type of charact
    Upper-case Character: A-Z
    Lower-case Character: a-z
    Number: 0-9
    Special Character: &~`!-@#$%^*()_+={}[]|\:;"'<>,.?/
The new password must not match any of the user's most recent 6 passwords.
The new password will be set to expire in 60 days.

New Password [   ]
Confirm New Password [   ]

[Continue] [Cancel]

d. Enter a new password in the New Password and Confirm New Password fields. The password is case sensitive and must match in both fields.

e. Click 'Continue' to complete the login process.

f. When 'Cancel' is clicked, you will see a pop-up with the following message: "You must change your password before accessing the system. If you do not change password, you will be logged off the system".

g. Clicking 'Cancel' on this pop-up takes the user back to the previous Change Password pop-up. Clicking 'OK' takes the user to the login screen.

h. The Security Questions screen displays as follows:

    i. "What city were you born in?"

    ii. "What year did you graduate from high school?"

    iii. "What is your favorite sport?"

    iv. "What was the make of your first car?"

    v. "What was the color of your first car?"

    vi. "What is your mother's maiden name?"

    vii. "What was the name of your first pet?"

    viii. "What size shoe do you wear?"

    ix. "What is your favorite season of the year?"

x. "What is your favorite movie?"

i. Complete the answers to at least six (6) questions of your choice.

j. Click 'OK'.

k. The initial application screen displays for the default user role. The password for the default user account has now been changed.

INITIAL SETUP – FIRST DATA CREATED

Detailed instructions for adding Facility data and System Administrator data are found in the HART User Guide.

The following sections provide only the most basic steps, with no screen shots. For detailed instructions, see the following sections in the HART User Guide:

- Facility Setup
- User Setup

ADD A FACILITY

During the initial setup, a Facility must be the first data record added.

The default user must create at least one Facility.

Complete the following steps to create a new Facility.

1. Select the Facility option from the Administration drop down on the Menu Bar.

2. The Facility Information screen displays.

3. Enter the appropriate Facility data in the fields listed on the right side of the screen

4. After Facility information has been entered, click the 'Save' icon.

5. Saved Facility information will display in the Facility Summary section on the left side of the screen.
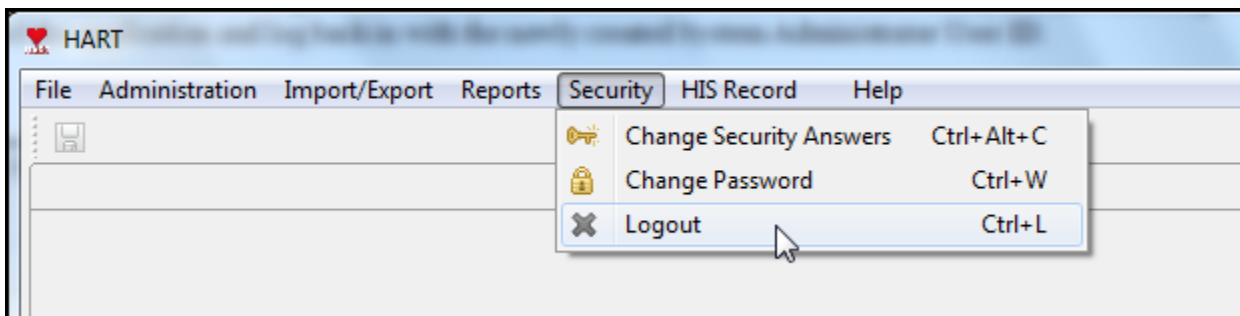

ADD A SYSTEM ADMINISTRATOR USER

It is highly recommended to set up more than one System Administrator user as a back-up, in the event that one of the System Administrator users becomes locked.

Note: You must add at least one System Administrator before the full HART menu will be displayed or any other processing will be allowed.

Complete the following steps to create a new System Administrator User ID.

1. Select the User option from the Administration drop down on the Menu Bar.

2. The User Information screen displays.

3. Enter user data in the column on the right side of the screen. Required fields display on the screen in bold type with an asterisk.

4. After user information has been entered, click the 'Save' icon.

5. Saved user information will display in the User Summary section on the left side of the screen.

6. After successfully adding at least one System Administrator and at least one Facility, the user must log out of the application and log back in with the newly created System Administrator User ID.

    a. Select the 'Logout' from the Security drop down on the menu bar.

    b. The login pop-up window displays.

    c. Enter the new System Administrator User ID, which was just added into HART, into the User Id field.
    d. Enter the same User ID in the Password field.

   Both the User ID and Password MUST be the same. They are case sensitive.

WINDOWS 'ALL PROGRAMS'

The user will find the following list under 'Start' - 'All Programs'.

Complete the following steps to uninstall the Standalone and Client/Server from the 'Start' - 'All Programs' drop down.

1. Click on 'Uninstall'.

2. The question pop-up will ask: "Are you are sure you want to completely remove HART 1.1.0 and all of its components? The database backup file(s) will NOT be removed."
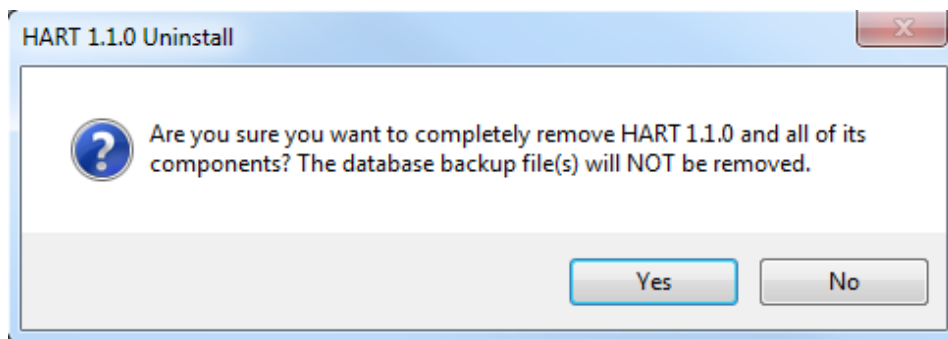
3. Click on 'Yes' if you wish to continue with the uninstall process.

4. The progress bar will illustrate the progress of the uninstall process.

5. When the Uninstall is complete, the final message will be displayed. "HART 1.1.0 was successfully removed from your computer."

6. Click 'OK'.

   Note: Uninstalling the Client install will not uninstall the Server and vice versa. You will have to manually uninstall both if you wish to remove the entire Client/Server application.

Uninstalling the application and server may also be accomplished using Windows Control Panel/Uninstall or change a program feature.

1. Double-click on the desired install you wish to remove.
2. Follow the instructions to complete the uninstall process.

Note: Uninstalling the Client install will not uninstall the Server and vice versa. You will have to manually uninstall both if you wish to remove the entire Client/Server application.