



# Quick Sheet: Setup and Installation

**Overview:** This document describes the steps necessary to create a doc2MD EHR account. To create the account, the user will need a credit card, email address for the primary contact for the practice and a place to take notes such as the left border of the Quick Sheet.

**You will need:** A folder on your file server created for the purpose of storing doc2MD documents and configuration information. This folder should be setup as a Microsoft Windows Share Point that allows all users of doc2MD Full access to the resources of the Share Point. Recommended name is:

[\\Server\doc2MD](#). Have your computer professional prepare this folder prior to installation of doc2MD.

Enter the **Shared document location** here:

**Step 1:** Identify a **Shared document location** on your hard drive (single user: **c:\doc2MD**) or a shared network drive for doc2MD to use as a storage location for documents created by the software. *This is not the installation folder.* For a network installation, the selected folder should be implemented as a *share point* and have full rights assigned to all users that will use the doc2MD software. To check user rights, please refer to your network administrator or computer consultant. Example [\\Server\doc2MD](#) where Server is the name of your server and doc2MD is the name of the share point.

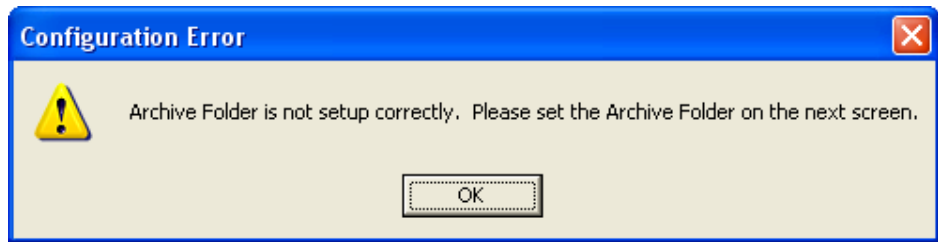
**Step 2:** Download doc2MD from the doc2MD web site:

<http://www.doc2md.com/Support/Downloads/tabid/92/Default.aspx>

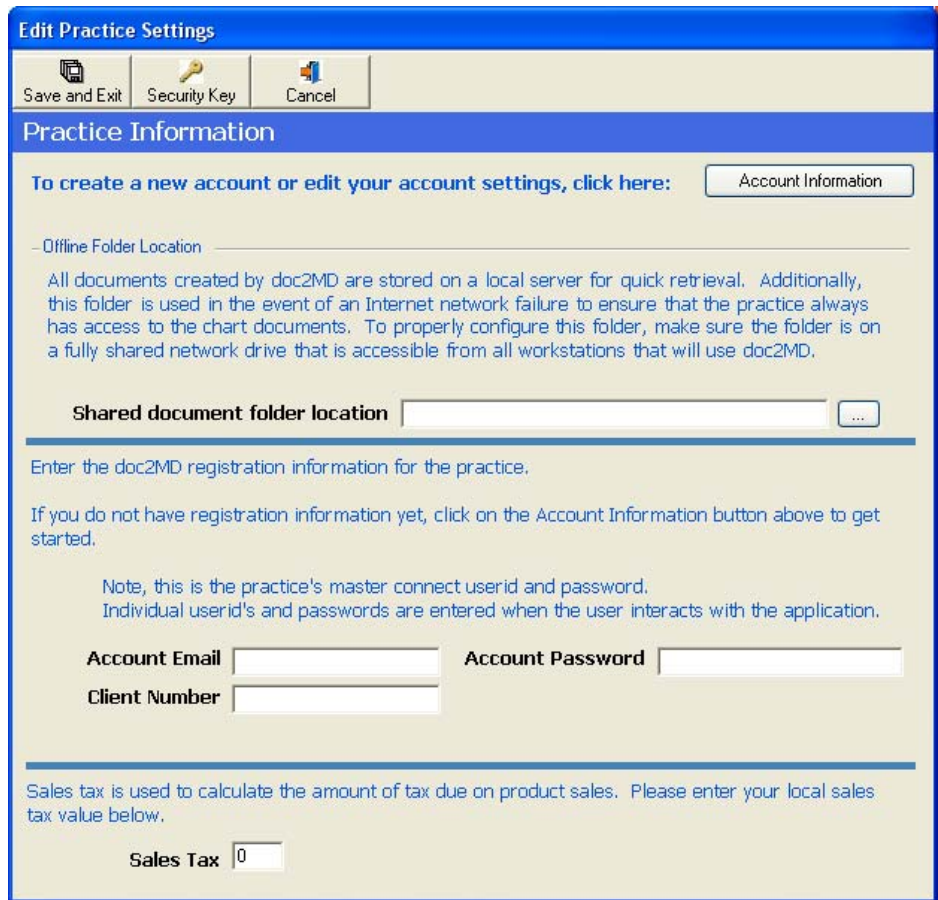
During the installation process, you may be asked to download and install the Microsoft Dot Net Framework. If prompted, choose yes to download and install this software. Once complete, run the doc2MD software.

**Step 3:** Running doc2MD for the first time: Note: If you have already registered doc2MD, proceed to Step 4.

When starting doc2MD for the first time, doc2MD will check the archive folder location. If it is not setup correctly, doc2MD will error with the following dialog:



Press Ok to correct this issue on the following dialog.



Enter the location you identified in Step 1 into the Shared document folder location of this dialog. If you are not a registered user of doc2MD, press the Account Information button to proceed to the account setup dialog.

Enter your account email and account password here and store for future reference:

Account Setup Use this dialog to update or change your contact information.

Practice Information

Practice Name:

Contact:

Address:

City:  State:  Zip Code:

Phone:  Fax:

DEA Number:

Your Email Address will be used as your Master Account User ID. doc2MD will also use this address to send you updates regarding your account.

Account Email:

Account Password:

Secret Question:  Answer:

Credit Card Information:

Click here if billing address is the same?

To create a new account, the following information is required. Note: You will not be billed. This information is used as a security measure in order to verify the authenticity of the user.

First Name:  Last Name:

Billing Address:

City:  State:  Zip Code:

Type:  Expiration:

Number:  CVC2 Number:

Save Information Exit without change

Complete the fields listed taking special attention to your account email and password. Remember, this password will be used to identify your practice within the doc2MD software. Ensure that the password includes upper and lower case letters and at least one number. To complete this step, you will need a credit card (all major credit cards are accepted). Once complete, press Save Information to create your new account.

**Step 4:** Once you have created your account, doc2MD stores your account information in the Shared document location so that additional computers/workstations may be configured without going through this process again.

To setup subsequent workstations, complete steps 1 and 2 and then enter the folder location for the Shared document folder, and doc2MD will complete the dialog once you tab off the text box to let you proceed to the main program.