MatrixCare
System Requirements
MatrixCare® System Requirements

This document was written for use with MatrixCare branded applications.

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Companies, names, and data used in examples herein are fictitious unless otherwise noted.

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## Table of Contents

- **MatrixCare™ Requirements Introduction** ................................................................. 1
- **MatrixCare System Requirements** ........................................................................ 2
  - Technical Description .......................................................................................... 2
  - Client PC Hardware & Software Requirements .................................................... 2
- **MatrixCare Workstation Configuration** .................................................................. 6
  - Workstation Data Encryption ............................................................................. 6
  - Adobe Reader Options ....................................................................................... 6
  - ActiveX Controls .............................................................................................. 6
  - Printing ............................................................................................................. 7
  - Internet Explorer Version Considerations ........................................................... 7
  - Internet Explorer Options .................................................................................. 7
- **MatrixCare Workstation Configuration: eMAR Addendum** ...................................... 13
  - Wireless Network ............................................................................................ 13
  - Desktop Resolution .......................................................................................... 13
  - MatrixCare eMAR User Accounts ..................................................................... 13
  - Internet Explorer Optimization for Touch-Screen Users ..................................... 13
  - iPad and Other Non-Windows Devices ............................................................. 13
  - MatrixCare eMAR Carts .................................................................................. 14
- **MatrixCare Workstation Configuration: POC Addendum** ....................................... 15
  - Typical POC Implementation .......................................................................... 15
  - Configuring a MatrixCare POC Device ............................................................. 16
- **MatrixCare Financials System Requirements** ......................................................... 17
  - Workstation Requirements .............................................................................. 17
  - Operating Systems .......................................................................................... 17
- **MatrixCare Marketing (REPS) System Requirements** ............................................. 18
  - Technical Description ...................................................................................... 18
  - Client PC Hardware & Software Requirements .................................................. 18
  - Client Network Requirements ......................................................................... 19
- **MatrixCare Marketing (REPS) Workstation Configuration Addendum** .................... 20
  - Internet Explorer Settings ............................................................................... 20
  - Client Workstation Set Up for Internet Explorer ............................................... 22
- **MatrixCare Claims Management System Requirements** ........................................ 32
  - Technical Description ...................................................................................... 32
  - Client PC Hardware & Software Requirements .................................................. 32
  - Claims Management Workstation Configuration ............................................. 33
  - Additional Notes .............................................................................................. 33
- **MatrixCare Claims Management Workstation Configuration** ................................. 35
  - Workstation Data Encryption .......................................................................... 35
  - Adobe Reader ................................................................................................ 35
MatrixCare™ Requirements Introduction

This document describes the MatrixCare requirements and configuration recommendations for all MatrixCare branded applications. You can view or print the entire document or any portion to satisfy your specific needs. Click the link in the following list to go to that section:

- MatrixCare System Requirements
- MatrixCare Workstation Configuration
- MatrixCare Workstation Configuration: eMAR Addendum
- MatrixCare Workstation Configuration: POC Addendum
- MatrixCare Financials System Requirements
- MatrixCare Marketing (REPS) System Requirements
- MatrixCare Marketing (REPS) Workstation Configuration
- MatrixCare Claims Management System Requirements
- MatrixCare Claims Management Workstation Configuration
- MatrixCare Drop It System Requirements
- MatrixCare Marketing Mobile App Requirements
- MatrixCare Assisted Living KPI Mobile App Requirements
- MatrixCare Analytics Requirements

Note: When making Windows operating system upgrade decisions, please note that the core MatrixCare product now supports Windows 8, (though we recommend Windows 7).

Microsoft is withdrawing support for Windows XP in April 2014; therefore MatrixCare will do the same.

Please consult MatrixCare Support at 866-287-4987 before purchasing new hardware or software to ensure that you have the most current version of this document, and that your selections are compatible with all MatrixCare applications that you intend to run.
MatrixCare System Requirements

This document describes the MatrixCare configuration recommendations for client networks running MatrixCare applications. As the MatrixCare application suite continues to mature, the recommendations provided here are subject to change without prior notice. Please contact MatrixCare Support before purchasing new equipment to ensure that you have the most current version of this document.

Technical Description

MatrixCare is a hosted, Web-based application used by Long Term Care facilities. MatrixCare is accessed via the Internet using Microsoft Internet Explorer.

MatrixCare is a multi-tiered application hosted in a Tier-4 secured facility that provides the highest-level of services available in data center redundancy and high-availability.

Client PC Hardware & Software Requirements

**Recommended Hardware**
- Intel Core2Duo or AMD equivalent (2.5GHz)
- 4 GB memory or more
- 10/100/1000MB network interface card
- 19” monitor or larger
- 1024 x 768 desktop resolution (or higher)
- Windows compatible laser printer.

**Minimum Hardware**
- Intel Pentium 4 or AMD equivalent (1.8 GHz)
- 2 GB memory
- 10/100MB network interface card
- 17” monitor
- 800 x 600 desktop resolution
- Windows compatible laser printer.

**Recommended Software**
- Windows 7 (32-bit or 64-bit), Windows 8 also supported
- Internet Explorer 9 or 10 (32-bit only)
- Microsoft Excel 2010 (32-bit or 64-bit)
- Adobe Reader 11.0.

**Minimum Software**
- Windows 7 (32-bit or 64-bit).
- Internet Explorer 9.0 (32-bit only)
- Adobe Reader 9.0.

The hardware recommendations described here are based on current industry standards and customer feedback. They are for use when selecting computer hardware and software. MatrixCare performance is primarily dependent upon the speed of a facility’s Internet connection. If your organization uses computer hardware that does not meet these recommendations, but performance in Windows and Internet Explorer is acceptable, then MatrixCare performance will also be acceptable if your Internet connection meets the network requirements described under Client Network Requirements.
Terminal/Citrix Clients

The Citrix terminal client software XenApp Client must be installed in order to setup terminals for use with MatrixCare. Contact your local systems administrator for more information about the Citrix client installation and setup.

For additional information, you can go to http://www.citrix.com/clients to obtain the client software download and to locate information that will assist in the setup of Citrix.

Tablets and Mobile Devices

Some tablet devices can be used with the Point of Care and eMAR modules in MatrixCare. However, a Windows workstation operating system must be installed on the device to provide access to Internet Explorer (unless the device is connected to a Microsoft Windows Terminal Server or Citrix server). Additionally, the device must be capable of at least 800 x 600 display resolution for Point of Care, or at least 1024 x 768 display resolution for eMAR.

Client Network Requirements

MatrixCare recommends that your network hardware consist of routers, switches, and firewalls intended for business use (not home office use).

- **Routers**: Dedicated hardware routers should be used to direct traffic across your network, and to increase the priority of MatrixCare network traffic if possible.
- **Firewalls**: Dedicated hardware firewalls should be installed between your Internet connection and your internal network.
- **Ports**: Ports 80 and 443 must be open to outbound connections to ensure full MatrixCare functionality.

Internet Connection

Use a reputable Internet Service Provider (ISP) and dual Internet connections to ensure that MatrixCare is tightly integrated into your organization’s processes. Although MatrixCare runs effectively on a single Internet connection, MatrixCare recommends that you purchase a second Internet connection from a different service provider (which could be slower) to ensure that your staff has access to MatrixCare if your primary Internet connection suffers and outage.

Bandwidth

MatrixCare strongly recommends that your organization take steps to prevent users from wasting bandwidth. This can be accomplished using third party applications, firewall rules, internally mandated policies, and etc.

Be sure to allow MatrixCare traffic and assign it a higher priority (if possible) when configuring your content filtering software or appliance and other network equipment. As with any Web-based application, if bandwidth is not available, users will experience slow response times.
The following table contains minimum bandwidth recommendations for various numbers of concurrent users. If the Internet connection at your facility is not dedicated to MatrixCare, you may need to increase the speed of your connection depending on usage patterns.

<table>
<thead>
<tr>
<th>Number of Concurrent MatrixCare Users</th>
<th>Minimum Upload and Download Speed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-5 concurrent MatrixCare users</td>
<td>At least 512 Kbps (upload and download)</td>
</tr>
<tr>
<td>6-10 concurrent MatrixCare users</td>
<td>At least 1 Mbps (upload and download)</td>
</tr>
<tr>
<td>11-20 concurrent MatrixCare users</td>
<td>At least 2 Mbps (upload and download)</td>
</tr>
<tr>
<td>21-30 concurrent MatrixCare users</td>
<td>At least 3 Mbps (upload and download)</td>
</tr>
<tr>
<td>31 concurrent MatrixCare users or more</td>
<td>At least 4 Mbps (upload and download)</td>
</tr>
</tbody>
</table>

Whenever possible, minimum bandwidth recommendations should be exceeded.

**MatrixCare POC Devices**

MatrixCare Point of Care (POC) is an add-on MatrixCare module that is used for bedside charting. Many POC clients use wirelessly connected, cart-mounted laptops with extended-life batteries. Others prefer to use hard-wired, wall-mounted kiosks, or All-In-One touch-screen computers. In addition, some clients use wireless tablets capable of a minimum 800 x 600 display resolution. Due to the wide variety of acceptable options, MatrixCare does not recommend specific computers for MatrixCare POC, but many clients have said that they are pleased with the performance of the HP computers.

- **Minimum Display Resolution:** 800 x 600 (1024 x 768 preferred)
- **Number of Devices:** Depends on the needs of the facility, but typically one device for every 10 beds.
- **Hardware and Software Requirements:** Same as MatrixCare (above).
- **Device Location:** CMS guidelines specify that wall mounted devices must not extend out more than 6 inches from the wall, not exceed a length of 36 inches, be separated from other projections by at least 48 inches, be mounted at least 40 inches above the floor, and only be mounted in corridors that are at least 6 feet wide. Mobile devices should be locked in a secure location and connected to a battery charger when not in use.
- **Additional Information:** Refer to the [MatrixCare Workstation Configuration: POC Addendum](#).
**MatrixCare eMAR Devices**

MatrixCare eMAR (Electronic Medication Administration Record) is an add-on MatrixCare module that is used for medication administration. In order to successfully implement MatrixCare eMAR, you need wireless, cart-mounted laptops with extended-life batteries, or wireless tablets capable of 1024 x 768 display resolution.

Due to the wide variety of acceptable options available, MatrixCare does not recommend specific computers for MatrixCare eMAR, but many clients have said that they are pleased with the performance of the HP computers. Touch screen computers are recommended, but not required.

- **Minimum Display Resolution:** 1024 x 768
- **Number of Devices:** Depends on the needs of the facility.
- **Hardware and Software Requirements:** Same as MatrixCare (above).
- **Device Location:** The eMAR cart should be constantly attended when not locked in a secure location, and the eMAR device should be connected to a battery charger when it is not in use.
- **Additional Information:** Refer to the MatrixCare Workstation Configuration: eMAR Addendum.

**Resident Photo Uploads**

Resident photos must be cropped/sized before they are uploaded to MatrixCare. Following are the specifications:

- Width: 75 pixels
- Height: 100 pixels.

*Note:* You can only upload resident photo files in .JPG (JPEG) format.

**Provider Fax Machine Requirements**

MatrixCare clients are required to send the information listed below to their Lab/Radiology Providers. Following are the requirements for uploading documents to MatrixCare from a provider:

**Hardware**

- Laser or laser quality fax machine with at least a 300 DPI fax mode.

**Function**

- 300 DPI required (600 DPI preferred when faxing documents).
- Do not use the lowest fax quality setting.

**MatrixCare Support:** If you have any questions, please contact MatrixCare Support and ask to speak to a technical analyst: 866-287-4987 or email: support@matrixcare.com.
MatrixCare Workstation Configuration

MatrixCare workstations can run Windows 7 or 8 (32-bit or 64-bit). However, MatrixCare requires the 32-bit version of Internet Explorer, and will not function correctly in other Web browsers.

**Note:** When making Windows operating system upgrade decisions, please note that the core MatrixCare product now supports Windows 8, (though we recommend Windows 7).

Microsoft is withdrawing support for Windows XP in April 2014, therefore MatrixCare will do the same.

Other than Internet Explorer, the only application that MatrixCare requires is Adobe Reader. Optionally, some users may need Microsoft Excel to export data to a spreadsheet.

Workstation Data Encryption

MatrixCare network traffic to and from the data center is encrypted using 128-bit SSL encryption. However, when a report is generated and streamed to a user workstation, the user can save the data. MatrixCare recommends that clients secure HIPAA-protected resident data on workstations by purchasing one of the commercially available data encryption applications.

One option is Bit Locker, which is a data encryption tool that is included in Windows 7 or 8, Enterprise or Ultimate editions. The Bit Locker tool can be used to encrypt an entire hard drive, rendering it completely useless unless the user has the 25-character code to unlock it.

Adobe Reader Options

MatrixCare requires Adobe Reader to display reports and other output. We recommend version 11. Adobe Reader versions 9.0, 9.5, and 11.0 are supported. Adobe Reader 10 is not recommended for use with MatrixCare. You can obtain Adobe Reader at: [http://get.adobe.com/reader](http://get.adobe.com/reader).

ActiveX Controls

The MatrixCare E-Learning system requires the Adobe Flash Player for Internet Explorer. You can obtain the Adobe Flash Player at: [http://get.adobe.com/flashplayer](http://get.adobe.com/flashplayer)

The MatrixCare Resident Documents feature requires Adobe Flash Player to upload multiple documents at one time. MatrixCare has certified Adobe Flash Player Version 11.6 or later. This feature works with older versions of Adobe Flash Player, but for best performance we recommend upgrading to Adobe Flash Player at: [http://www.adobe.com/support/flashplayer/downloads.html](http://www.adobe.com/support/flashplayer/downloads.html)

For Adobe Flash, you must ensure that the Shockwave Flash Object add-on is enabled:

1. From the Tools menu in Internet Explorer, select Internet Options.
2. Select the Programs tab and then select Manage Add-ons.
3. Find the Shockwave Flash Object and verify that the Status is Enabled. If not, select the add-on and click the Enable button.
4. Click Close.
Printing
The documents and reports that MatrixCare users typically need to print are streamed to their workstations in PDF or Excel format. After the output is generated and displayed, printing is completed on your local computer/printer. If you can print a PDF or Excel document, then you can print MatrixCare output.

Internet Explorer Version Considerations
MatrixCare recommends Internet Explorer version 10 or later for use with MatrixCare. Internet Explorer 9 is also supported. The CMS Web site (used to submit MDS submissions, and developed by the U.S. government) recommends Internet Explorer version 9. Please consider this when deciding which version of Internet Explorer to use.

Note:  MatrixCare supports Microsoft Internet Explorer version 9 or later. However, Claims Management does not currently support versions 10 or later. Therefore, you should not upgrade to Internet Explorer 10 if you use MatrixCare Claims Management.

Internet Explorer Options
The browser settings detailed below apply to Microsoft Windows workstation operating systems, such as Windows 7 and Windows 8. Browser settings that deviate from the following could prevent MatrixCare reports from displaying correctly and/or cause intermittent errors.

Requirements
From the Tools menu in Internet Explorer, select Internet Options (or open Internet Options in the Windows Control Panel). The Internet Options window contains several tabs. Configuration changes must be made on the General, Security, and Advanced tabs. These changes are described in the following pages.

General Tab
1. In the Browsing history section, click Settings. The Temporary Internet Files and History Settings window appears.
2. Under Temporary Internet Files, select Every time I visit the webpage.
3. In the Disk space to use field, select at least 50MB.
4. Click OK. The Temporary Internet Files and History Settings window is dismissed.
5. On the Internet Options window, click Apply.

Security Tab
1. Click the Trusted sites icon. The Trusted sites window appears.
2. In the Add this website to the zone: field, enter *.achievematrix.com.
3. Click Add.
4. Click Close. The Trusted sites window is dismissed.
5. With the Trusted sites icon still selected, review the Security level for this zone setting. It must be set to Medium or lower to ensure optimal use of Point of Care.

6. On the Security tab, disable the Enable Protected Mode option in IE8 or later, (deselect the check box).

7. Click Apply.

Content Tab

For HIPAA-related security reasons MatrixCare recommends that you disable AutoComplete on the Content tab, (not required for MatrixCare functionality).

1. Click the Content tab, under AutoComplete, click Settings. The AutoComplete Settings window appears.
2. Deselect all check boxes in the Use AutoComplete for pane.
3. Click OK. The AutoComplete Settings window is dismissed.

Advanced Tab

1. In the Settings pane, under Browsing:
   - Disable the Reuse windows for launching shortcuts option, (deselect the check box).
   - Disable the Show friendly HTTP error messages option, (deselect the check box).
   - Disable the Enable automatic crash recovery option, (deselect the check box).
2. In the Settings pane, under HTTP 1.1 Settings, enable the Use HTTP 1.1 option, (select the check box).
3. In the Settings pane, under Security:
   - Disable the Do not save encrypted pages to disk option, (deselect the check box).
- Enable the Empty Temporary Internet Files folder when browser is closed option, (select the check box).
- Enable the Use SSL 2.0 option, (select the check box).
- Enable the Use SSL 3.0 option, (select the check box).
- Enable the TLS 1.0 option, (select the check box).

4. On the Internet Options window, click Apply.
5. Click OK. The Internet Options window is dismissed.

---

**Update Internet Explorer Compatibility View List**

On the Tools menu select Compatibility View Settings.

1. In the Add this website: field, enter the following Web sites, and click Add for each:
   - matrixcare.com
   - achievematrix.com
   - mdiachieve.com
   - relayhealth.com.
2. When finished, click Close. The Compatibility View Settings window is dismissed.
**Windows Processor Scheduling and Memory Usage**

Following are settings for the Microsoft Windows workstation operating system. To adjust these settings, perform these steps:

1. In Windows, open the Control Panel and select the System icon.
2. Click the Advanced systems settings tab. The System Properties window appears.
3. In the Performance section click Settings. The Performance Options window appears.
4. Click the Advanced tab.
5. In the Processor scheduling pane, under Adjust for best performance of: select the Programs radio button.
6. In the Virtual memory pane, click Change. The Virtual Memory window appears.
   If selected, deselect the Automatically manage paging file size for all drives check box.
7. Click the Custom size: radio button, and enter 3072 in the Initial size and Maximum size fields, then click OK.
8. Click OK. The Performance Options window is dismissed.
9. Click OK. The System Properties window is dismissed.

**Security and Performance**

The following items can potentially affect the security and performance of MatrixCare:

**Bandwidth**

As stated in the MatrixCare System Requirements document, MatrixCare is a web-based application, which means that users will experience performance problems if there isn’t enough Internet bandwidth available. As a general rule, MatrixCare recommends investing in an Internet connection that can provide 100 Kbps of upload and download bandwidth to each MatrixCare user, (approximately 1 Mbps of upload and download bandwidth per 10 concurrent MatrixCare users).

**Spyware**

Programs that are installed without your consent (when visiting non-MatrixCare websites) can have adverse effects on workstations, such as data mining. MatrixCare recommends that your organization invest in an effective spyware clean-up tool, and use it to periodically check your workstations for unwanted content.

**Virus Scanning and Anti-virus Appliances**

For security reasons, workstations with access to the Internet should have virus protection. However, use of anti-virus software can potentially block required downloads. Please ensure that your settings comply with the port settings listed in the MatrixCare System Requirements document.

**Internet Explorer Add-ins**

Most third-party add-ins for Internet Explorer can be used with MatrixCare. However, some add-ins can cause problems in MatrixCare. For example, most pop-up blockers will prevent the report window from appearing. In addition, Internet Explorer toolbars and some screen savers have been known to cause problems.

**Other Applications**

MatrixCare understands that most MatrixCare workstations will be used for additional purposes, such as email and online research. Please be aware of potential conflicts when installing third party applications on a MatrixCare workstation.
**Microsoft Windows Updates**

Microsoft regularly releases operating system updates via the Windows Update website and Automatic Updates. Updates are recommended to avoid security-based issues at the workstation level. However, all Internet Explorer browser updates are subject to testing and approval by MatrixCare before implementation. Call MatrixCare Support for details as these updates are released.
MatrixCare Workstation Configuration: eMAR Addendum

Wireless Network
MatrixCare recommends hiring a professional wireless company to evaluate your organization’s needs and install to your wireless network. After the installation is complete, your technical resources should test Internet connectivity in all locations where MatrixCare eMAR is used.

Desktop Resolution
MatrixCare eMAR is designed for 1024 x 768 display resolution, but higher resolutions are possible. However, 1024 x 768 display resolution is highly recommended for touch screen computers to provide a better presentation of the MatrixCare eMAR workspace and to minimize scrolling.

MatrixCare eMAR User Accounts
Configure eMAR user accounts (local workstations) to display a minimal number of options under the Facility menu in MatrixCare. If the Facility menu list extends past the eMAR page frame, the Internet Explorer scroll bar appears; making it necessary to scroll more often, which can be more difficult when using a touch-screen device.

Internet Explorer Optimization for Touch-Screen Users
In Internet Explorer, if the content is too large for the window to display, scroll bars appear, both vertically and horizontally as needed.

You can minimize scrolling and optimize the eMAR user experience in Internet Explorer by deselecting un-needed toolbars, selecting to use small icons, and using 1024 x 768 display resolution.

iPad and Other Non-Windows Devices
MatrixCare eMAR requires Internet Explorer. However, some mobile devices that are not Windows-based can still be used with eMAR. In order to use Internet Explorer on a non-Windows device, it is necessary to connect to a computer that is running a Microsoft Windows operating system, such as a Microsoft Windows Terminal Server. There are several methods available, the most common being RDP and Citrix.

As mentioned elsewhere in this document, the configuration of your terminal servers and/or Citrix servers is the responsibility of your internal technical resources.

Additionally, consider that the recommended display resolution for MatrixCare eMAR is 1024 x 768, and some devices may not be capable of that resolution.
MatrixCare eMAR Carts

MatrixCare does not recommend specific carts for use with MatrixCare eMAR. However, almost any medication cart can be converted to an eMAR cart by attaching a standard laptop computer or touch-screen computer. Alternatively, some commercially available medical carts are ideal for MatrixCare eMAR.

When selecting or designing your eMAR carts, be sure to consider ergonomics and infection control, as well as the method you will use to secure the carts and attached computers.
MatrixCare Workstation Configuration: POC Addendum

Typical POC Implementation

The most common way to implement MatrixCare Point of Care (POC) is to have the POC devices boot directly into Windows, launch Internet Explorer in full screen mode, and open to the POC login page. The POC devices can be standard laptop computers, touch-screen computers, or mobile devices.

The simplest way to configure a POC device to boot directly into Windows is to use the default Windows configuration and not add any users, (and not add the device to a Windows domain). Keeping the device in a “workgroup” and not adding any users causes the computer to boot directly into Windows.

If domain membership is required, it is possible to configure Windows to login to a domain automatically. You can also add POC devices to a domain and require users to login, but efficiency and productivity may be affected. POC devices do not need to login to Windows automatically.

If you want Internet Explorer to open in full screen mode and go to the POC login page after logging into Windows, copy the MatrixCare POC shortcut to the Start menu: Start > Programs > Startup as described in Configuring a MatrixCare POC Device.

Tip: If necessary, you can press Alt + F4 to close Internet Explorer when you are in full screen mode.

Power Saving Options

Turn off “hibernation” or “monitor power off” in the Power Options Properties window and BIOS setup.

Many POC clients configure a blank screen screensaver to appear after 1 minute of idle time, and do not require a password to turn off the screensaver. This theoretically reduces interest in the device by passersby, and Nursing Assistants can simply approach the device and touch the screen to display the POC login screen, and then login to POC. The screensaver configuration described above is optional. Your internal technical resources should evaluate the needs of your facility and choose a screensaver policy that works best for your organization.

Imaging POC Devices

Imaging a fully configured POC device is not recommended because the cookie that is automatically created on the device when it is setup in MatrixCare is unique. Therefore, if the standard practice of your organization is to create an image of a new computer then you will need to create a separate image for each device, after each device is setup in MatrixCare.
Configuring a MatrixCare POC Device

After you perform the initial configuration of a POC device (refer to MatrixCare Workstation Configuration), you are ready to set it up in MatrixCare. Perform the following steps to configure the POC device:

Create POC Shortcut

1. Navigate to C:\Program Files\Internet Explorer.
2. Right-click on IEXPLORE.EXE, select Send To, then select Desktop (create shortcut).
3. Right-click on the new desktop icon and select Rename.
4. Rename the shortcut. For example: MatrixCare POC or MatrixCare Point of Care
5. Right-click on the new desktop icon again and select Properties.
6. In the Target field, after the last quotation mark ("), add a space and type -k https://example.achievematrix.com/poc. This is the path to POC.

Note: You must replace the example URL with your client-specific MatrixCare URL. Following is an example:

"C:\Program Files\Internet Explorer\iexplore.exe" -k https://example.achievematrix.com/poc

7. Click OK.

Setup the POC Device in MatrixCare

1. Double-click the new MatrixCare POC desktop icon to launch Internet Explorer.
2. Login to MatrixCare with a user account that is granted rights in the facility where the POC device will be used, and is granted rights to set up a POC device in MatrixCare.
3. On the Facility menu, click View Facility.
4. In the POC Setup section of the View Facility window, look for the Setup this device link.

Note: If the link is not present, you either do not have the required security tokens to setup a POC device in MatrixCare, or your facility is not configured to use POC.

5. Click the Setup this device link. A cookie is created in the Windows profile of the user that is currently logged in to Windows. If the cookie is later deleted, the POC device must be reconfigured.
6. The MatrixCare POC login screen appears. The configuration is complete.
7. If you are using a kiosk computer, it may be necessary to "commit" the new configuration to firmware before rebooting. Please refer to the device user manual or contact the manufacturer for instructions.
8. Shutdown the POC device and install it in a permanent location.
MatrixCare Financials System Requirements

This document describes the MatrixCare Accounts Payable and General Ledger system requirements.

**Note:** If your system does not meet the minimum requirements, your MatrixCare-installed software may not operate correctly, and could prevent MatrixCare from providing good support.

**Workstation Requirements**

- Processor: 1GHz or higher
- Memory: 1GB or higher (depending on system usage)
- 5 GB of disk drive space available
- Mouse
- Monitor and graphics card that supports 800x600 using 16-bit color depth (24-bit True Color recommended).

**Terminal/Citrix Clients**

The Citrix terminal client software XenApp Client must be installed in order to setup terminals for use with MatrixCare. Contact your local systems administrator for more information about the Citrix client installation and setup.

For additional information, you can go to [http://www.citrix.com/clients](http://www.citrix.com/clients) to obtain the client software download and to locate that will assist in the setup of Citrix.

**Internet Explorer Version Considerations**

MatrixCare recommends Internet Explorer version 10 or later for use with MatrixCare. Internet Explorer 9 is also supported.

**Operating Systems**

**Recommended**

Windows 7 or Windows 8 operating systems are supported. (Both require a minimum of 2 GB of RAM).

**Note:** When making Windows operating system upgrade decisions, please note that the core MatrixCare product now supports Windows 8, (though we recommend Windows 7).

Microsoft is withdrawing support for Windows XP in April 2014; therefore MatrixCare will do the same.

**Note:** Any Windows version Home edition is NOT a supported operating system because they are limited to peer-to-peer networks.

**MatrixCare Support**

If you have any questions, please contact MatrixCare Support and ask to speak to a technical analyst: 866-287-4987 or email: support@matrixcare.com.
MatrixCare Marketing (REPS) System Requirements

MatrixCare Marketing (formerly named REPS Leads) is now a part of the leading solution for long-term and senior living organizations.

This document describes the MatrixCare configuration recommendations for client networks running MatrixCare Marketing. As the MatrixCare Marketing application continues to mature, the recommendations provided are subject to change without prior notice. Please contact MatrixCare support before purchasing new equipment to ensure that you have the most current version of this document.

The recommendations contained in this document are for normal system use; not for training, which increases the number of concurrent users and can potentially result in temporary performance issues. If this is a concern for your organization (for example, if you provide on-going internal training for your employees), then you may want to consider purchasing a training environment that is separate from your production MatrixCare Marketing environment.

Technical Description

MatrixCare Marketing is a hosted, Web-based application used by long-term care facilities. It is accessed via the Internet using Microsoft Internet Explorer. The hosted environment consists of many application servers, report servers, and database servers that run on Windows Server 2003 in an SSAE16 audited data center.

When a MatrixCare Marketing user logs in to the application, they establish a connection between the application server and a Microsoft SQL 2005 database server, where all data is stored.

Client PC Hardware & Software Requirements

<table>
<thead>
<tr>
<th><strong>Recommended – Hardware</strong></th>
<th><strong>Minimum – Hardware</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Intel Core i5 or AMD Athlon II (2.5GHz)</td>
<td>• Intel Core2Duo or AMD Athlon X2 (2 GHz)</td>
</tr>
<tr>
<td>• 4 GB memory or more</td>
<td>• 2 GB memory</td>
</tr>
<tr>
<td>• 10/100/1000MB network interface card</td>
<td>• 10/100MB network interface card</td>
</tr>
<tr>
<td>• 19” monitor or larger</td>
<td>• 17” monitor</td>
</tr>
<tr>
<td>• 1024 x 768 desktop resolution (or higher)</td>
<td>• 800 x 600 desktop resolution</td>
</tr>
<tr>
<td>• Windows compatible laser printer</td>
<td>• Windows compatible laser printer</td>
</tr>
</tbody>
</table>

**Recommended Software**

- Windows 7 or 8 (32-bit or 64-bit)
- Internet Explorer 9 or later (32-bit only)
- Microsoft Excel 2010 or later
- Adobe Reader 11.0 (32-bit); Adobe Reader 10 is currently not supported.

**Minimum Software**

- Windows 7 (32-bit or 64-bit)
- Internet Explorer 9 (32-bit)
- Adobe Reader 9 (32-bit); Adobe Reader 10 is not supported.
Client Network Requirements

MatrixCare recommends that your network hardware consist of routers, switches, and firewalls intended for business use (not home office use). Cisco® network equipment is recommended, but not required.

**Routers:** Dedicated hardware routers should be used to direct traffic across your network, and to increase the priority of Matrix network traffic if possible.

**Firewalls:** Dedicated hardware firewalls should be installed between your Internet connection and your internal network.

**Ports:** Ports 80 and 443 must be open to outbound connections to ensure full MatrixCare Marketing functionality.

Internet Connection

Using a reputable Internet Service Provider (ISP) and dual Internet connections ensures that MatrixCare Marketing is tightly integrated into your organization’s processes. Although it runs effectively on a single Internet connection, MatrixCare recommends that you purchase a second Internet connection from a different service provider, (which may be slower), to ensure that your staff has access to the application, even if your primary Internet connection is down.

Bandwidth

MatrixCare strongly recommends that your organization take steps to prevent users from wasting bandwidth. This can be accomplished using firewall rules, internally mandated policies, and etc.

Be sure to allow MatrixCare Marketing traffic and assign it a higher priority (if possible) when configuring your content filtering software or appliance and/or other network equipment. As with any Web-based application, if bandwidth is not available, then users will experience slow response times.

The following table contains minimum bandwidth recommendations for various numbers of concurrent users. If the Internet connection at your facility is not dedicated to MatrixCare, you may need to increase the speed of your connection depending on other usage patterns.

<table>
<thead>
<tr>
<th>Number of Concurrent MatrixCare Marketing Users</th>
<th>Minimum Upload and Download Speed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-5 concurrent users</td>
<td>At least 512 Kbps (upload and download)</td>
</tr>
<tr>
<td>6-10 concurrent users</td>
<td>At least 1 Mbps (upload and download)</td>
</tr>
<tr>
<td>11-20 concurrent users</td>
<td>At least 2 Mbps (upload and download)</td>
</tr>
<tr>
<td>21-30 concurrent users</td>
<td>At least 3 Mbps (upload and download)</td>
</tr>
<tr>
<td>31 concurrent users or more</td>
<td>At least 4 Mbps (upload and download)</td>
</tr>
</tbody>
</table>

Whenever possible, minimum bandwidth recommendations should be exceeded.
MatrixCare Marketing (REPS) Workstation Configuration Addendum

This document describes the MatrixCare configuration recommendations for client networks running MatrixCare Marketing, formerly known as REPS Leads.

Internet Explorer Settings

For MatrixCare Marketing version 15.3 and later, users must perform the following steps within Internet Explorer to ensure that all selector (drop-down) lists function properly.

1. Open Internet Explorer.
2. On the menu bar, click **Tools**, and select **Compatibility View Settings**.

```
1. On the menu bar, click Tools, and select Compatibility View Settings.
```

**Note:** Depending on the version of Internet Explorer that you have installed, your windows may appear somewhat different from the ones shown here.

Note: Depending on the version of Internet Explorer that you have installed, your windows may appear somewhat different from the ones shown here.
3. The **Compatibility View Settings** window appears.

![Compatibility View Settings window]

3. The **Compatibility View Settings** window appears.

4. In the **Add this website** field, enter the following Web sites, and click **Add** for each:
   - matrixcare.com
   - achievematrix.com
   - mdiachieve.com
   - relayhealth.com.

5. When finished, click **Close**. The Compatibility View Settings window is dismissed.
Client Workstation Set Up for Internet Explorer

This document describes how to set up client computers with Internet Explorer installed that will access MatrixCare Marketing.

**Note:** Internet Explorer 9 or later is recommended for use with MatrixCare Marketing.

**Workstation Set Up**

**Note:** You must be logged in to the PC as the Local Administrator to make these changes.

1. Launch Internet Explorer, click the **Tools** option of the browser menu, and select **Internet Options**.

<table>
<thead>
<tr>
<th>Tools</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete Browsing History...</td>
<td>Ctrl+Shift+Del</td>
</tr>
<tr>
<td>InPrivate Browsing</td>
<td>Ctrl+Shift+P</td>
</tr>
<tr>
<td>Reopen Last Browsing Session</td>
<td></td>
</tr>
<tr>
<td>InPrivate Filtering</td>
<td>Ctrl+Shift+F</td>
</tr>
<tr>
<td>InPrivate Filtering Settings</td>
<td></td>
</tr>
<tr>
<td>Pop-up Blocker</td>
<td></td>
</tr>
<tr>
<td>SmartScreen Filter</td>
<td></td>
</tr>
<tr>
<td>Manage Add-ons</td>
<td></td>
</tr>
<tr>
<td>Compatibility View</td>
<td></td>
</tr>
<tr>
<td>Compatibility View Settings</td>
<td></td>
</tr>
<tr>
<td>Subscribe to this Feed...</td>
<td></td>
</tr>
<tr>
<td>Feed Discovery</td>
<td></td>
</tr>
<tr>
<td>Windows Update</td>
<td></td>
</tr>
<tr>
<td>Developer Tools</td>
<td>F12</td>
</tr>
<tr>
<td>Windows Messenger</td>
<td></td>
</tr>
<tr>
<td>Sun Java Console</td>
<td></td>
</tr>
<tr>
<td>Internet Options</td>
<td></td>
</tr>
</tbody>
</table>
2. From the **Internet Options** window, select the **General** tab. On the **General** tab, click **Settings**.

![Internet Options window](image)
3. From the **Settings** window, select the **Every time I visit the webpage** option, and then click **OK** to close the window.

4. You return to the **General** tab.
5. If you previously had problems accessing MatrixCare Marketing, it may be necessary to delete temporary internet files. To delete temporary internet files, from the General tab, under Browsing history click Delete…

![Image of Internet Explorer settings with Browsing history section highlighted]

**Note:** This step is not required for new, first-time access to Matrix Marketing.
6. On the **Delete Browsing History** window, ensure that the **Temporary Internet files** check box is selected, and the others are deselected as shown. Then click **Delete**.

7. Click the **Security** tab.
8. Click the **Trusted Sites** icon. The **Sites** button become available. Click the **Sites** button.
9. In the **Add this website to the zone** field, enter each of the following sites. Click **Add** after entering each URL:
- https://www.reps.biz
- https://www.reps1.biz
- https://www.reps2.biz
- https://www.reps3.biz
- https://*.mdiachieve.com
- https://*.matrixcare.com

10. All sites listed **must be entered**. Your screen should appear similar to the following example:

![Trusted sites window]

11. When finished, click **Close** to return to the main **Security** tab.
12. You must apply the following security settings under **both** the **Internet** and **Trusted Sites** icons. To do so click the **Trusted Sites** icon, select **Custom Level**, and apply the settings listed below, then click the **Internet** icon, select **Custom Level**, and apply these same settings again.
13. Scroll down to the **ActiveX controls and plug-ins**, heading, and set the options as described in the following steps:

- Automatic prompting for ActiveX controls to Enable.
- Binary and script behaviors to Enable.
- Display video and animation… No preferred setting.
- Download signed ActiveX controls to Prompt.
- Download unsigned ActiveX controls to Disable.
- Initialize and script ActiveX controls not marked as safe for scripting. Select Prompt only if you will use the mass email feature. Otherwise, select Disable.
- Only allow approved domains to use ActiveX without prompt to Enable.
- Run ActiveX controls and plug-ins to Enable.
14. Scroll down to the Miscellaneous heading. Set the Allow script-initiated windows without size or position constraints to Enable.

15. Click OK, and select Yes when prompted, Are you sure you want to change the settings for this zone?

16. You return to the main Security tab.

Do not forget to repeat these steps for both the Trusted Sites and Internet zones!
17. Click OK to close the current Internet Explorer session. Then re-open Internet Explorer. You should now be able to log in to MatrixCare Marketing.

18. While still logged into the computer as the Local Administrator, and logged in to MatrixCare Marketing, you must install two ActiveX controls as described in the following steps:
   - **IdealMM20.cab.**
     The IdealMM20 control is required to perform mail merges from MatrixCare Marketing. To install this file, click Leads and from any contact record, and click the Mailings button in the header. Click Select Template. You are prompted to install the IdealMM20 control.
   - **MeadCo Scriptx Advanced.**
     The MeadCo Scriptx control is required to view and print reports from MatrixCare Marketing.
     To install this file, click Reports, select Marketing, and click Print button on the report selection screen. You are prompted to install the MeadCo ScriptX control.

     If you are not prompted to download and install the MeadCo ScriptX control, go to this site to download it: http://www.meadroid.com/scriptx/userlink.asp.

19. When both the IdealMM20 and Meadco ScriptX controls are installed, you can log in as the local user on the computer.
MatrixCare Claims Management
System Requirements

This document describes the MatrixCare configuration recommendations for client networks running the Claims Management application. As the Claims Management application continues to mature, the recommendations provided are subject to change without notice. Please contact MatrixCare Support before purchasing new equipment to ensure that you have the most current version of this document.

Technical Description
Claims Management is a hosted, Web-based application that is intended for use by medical facilities to manage Medicare, Medicaid and third-party claims. The Claims Management application was developed by (and is hosted by) RelayHealth, a MatrixCare partner, and is accessed over the Internet using Microsoft Internet Explorer.

Client PC Hardware & Software Requirements

Recommended Hardware
- Intel Core2 Duo or AMD equivalent (~2.5GHz)
- 4 GB memory or more
- 10/100/1000MB network interface card
- 19” monitor or larger
- 1024 x 768 desktop resolution (or higher)
- Windows compatible laser printer

Recommended Software
- Windows 7 (32-bit or 64-bit), Windows 8 also supported
- Internet Explorer 9 or later (32-bit only)
- Microsoft Excel 2010 or later
- Adobe Reader 10 or 11 with Protected Mode disabled

Note: MatrixCare supports Microsoft Internet Explorer version 9 or later. However, Claims Management does not currently support versions 10 or later. Therefore, you should not upgrade to Internet Explorer 10 or later if you use MatrixCare Claims Management.

Note: MatrixCare supports Windows 7 or later. However, Claims Management does not currently support Windows 8. Therefore, you should not upgrade to Windows 8 or later if you use MatrixCare Claims Management.

Prior to purchasing any new terminal equipment, please contact MatrixCare Support to ensure the required operating system is compatible with the new hardware.
**Client Network Requirements**

MatrixCare recommends that your network hardware consist of routers, switches, and firewalls intended for business use (not home office use). Cisco® network equipment is recommended, but not required.

**Routers:** Dedicated hardware routers should be used to direct traffic across your network, and to increase the priority of Claims Management network traffic if possible.

**Firewalls:** Dedicated hardware firewalls should be installed between your Internet connection and your internal network.

**Ports:** Ports 80 and 443 must be open to outbound connections to ensure full Claims Management functionality.

**Internet Connection**

Using a reputable Internet Service Provider and dual Internet connections ensures that Claims Management is tightly integrated into your organization’s processes. Although Claims Management runs effectively on a single Internet connection, MatrixCare recommends that you purchase a second Internet connection from a different service provider, (which may be slower), to ensure that your staff has access to Claims Management if your primary Internet connection is down.

**Bandwidth**

Claims Management works with any business class broadband Internet connection, as long as each Claims Management user has approximately 50Kbps of upload and download bandwidth available to them.

MatrixCare strongly recommends that your organization take steps to prevent users from using/wasting bandwidth. This can be accomplished using several methods, such as, Websense®, Barracuda®, firewall rules, internally mandated policies, and so on. When users access streaming audio or video, or surf the Web incessantly, your facility’s bandwidth is unavailable to Claims Management. As with any Web-based application, if bandwidth is not available, users will experience slow response times.

**Claims Management Workstation Configuration**

The [Claims Management Workstation Configuration](#) document contains detailed instructions for setting up a Claims Management workstation, including Internet Explorer settings, Adobe Reader settings, and more. For more information, click the link above. For additional information, contact MatrixCare Support: support@matrixcare.com.

**Additional Notes**

**IP Restrictions**

MatrixCare does not provide the service of restricting application access to a limited range of IP addresses. There are several reasons for this, but avoiding extended outages is foremost among them. For example, if your organization’s Claims Management environment is only accessible from a specific IP address, (or range), and your IP address changes for some reason, it could take up to 72 hours for the problem to be resolved.
**Thin Clients and Terminal Servers**

No Remote Terminal Services technologies are supported for use with Claims Management. If a Remote Terminal Service is being used and issues with Claims Management processing occur, the Remote Terminal Service must be removed before the issues can be addressed.

**Performance Disclaimer**

Intermittent system slowdowns may occur during high volume facility activities. This is due to a combination of factors, including the amount of available bandwidth at your facility, and the workload being processed on the Claims Management servers. This is true of all client/server applications.

**MatrixCare Support**

If you have any questions, please contact MatrixCare Support and ask to speak to a technical analyst: 866-287-4987 or email: support@matrixcare.com.
MatrixCare Claims Management
Workstation Configuration

Claims Management workstations can run on Windows 7, (32-bit or 64-bit). However, Claims Management requires the 32-bit version of Internet Explorer and will not function correctly otherwise.

The only application that Claims Management requires is Adobe Reader. Optionally, some users might need to export data to a Microsoft Excel spreadsheet.

Note: MatrixCare supports Windows 8 or later. However, Claims Management does not currently support Windows 8. Therefore, you should not upgrade to Windows 8 or later if you use MatrixCare Claims Management.

Workstation Data Encryption

Claims Management network traffic to and from the data center is encrypted using 128-bit SSL encryption. However, after a report is generated and streamed back to a user’s workstation, the user has the ability save the data. Our recommendations for securing HIPAA protected resident data on your organization’s workstations are as follows:

- Bit Locker is a data encryption tool that is built into Windows 7 Enterprise and Windows 7 Ultimate. The Bit Locker tool can be used to encrypt an entire hard drive, rendering it completely useless unless you have the 25-character code to unlock it.
- PGP is another option for encryption. PGP allows you to encrypt an entire hard drive or parts of it.
- Computrace by Absolute software offers a software agent that can be installed on a workstation. After the agent has been installed on a workstation, it periodically checks in with Computrace headquarters. In the event of a theft, you have the ability to transmit a “poison pill” which will erase the entire hard drive.

Adobe Reader

Claims Management requires Adobe Reader to display reports and other output. If you are using Adobe Reader version 10 or newer, the “Protected Mode” option must be disabled. To disable “Protected Mode” in Adobe Reader, go to Edit > Preferences > General, and in the Application Startup section (at the bottom) disable the “Enable Protected Mode at startup” option, (clear the check box). Adobe Reader: [http://get.adobe.com/reader](http://get.adobe.com/reader)

ActiveX Controls

Claims Management uses one ActiveX control. Users are prompted to install the ActiveX control the first time they View/Edit Claims. Administrative rights are required to install it.

This function requires Internet Explorer 32-bit browser; 64-bit is not supported. For additional information on the ActiveX control, go to [https://clients.mdiachieve.com/clients/matrix/downloads.aspx](https://clients.mdiachieve.com/clients/matrix/downloads.aspx).
Printing

The documents and reports that Claims Management users typically need to print are streamed to their workstations in PDF or Excel format. After the output is generated and displayed, everything related to printing resides on the local computer. If you can print a PDF or Excel document, then you can print Claims Management output.

Internet Explorer Version

We recommend Internet Explorer version 9 (32-bit only) for use with Claims Management.

*Note:* MatrixCare supports Microsoft Internet Explorer version 9 or later. However, Claims Management does not currently support versions 10 or later. Therefore, you should not upgrade to Internet Explorer 10 or later if you use MatrixCare Claims Management.

Internet Explorer Options

The browser settings detailed below apply to Microsoft Internet Explorer workstations. Browser settings that deviate from these settings could prevent Claims Management reports from displaying correctly and/or cause intermittent errors.

Requirements

From the Tools menu in Internet Explorer, select Internet Options (or open Internet Options in the Windows Control Panel). The Internet Options window contains several tabs. Configuration changes must be made on the General, Security, and Advanced tabs. These changes are described in the following pages.
1. In the Browsing history section, click **Settings**. The **Temporary Internet Files and History Settings** window appears.
2. Under Temporary Internet Files, select Every time I visit the webpage.
3. In the **Disk space to use** field, select at least 50MB.
4. Click **OK**. The Temporary Internet Files and History Settings window is dismissed.
5. On the **Internet Options** window, click **Apply**.
Security Tab

1. Click the Trusted sites icon. The Trusted sites window appears.
2. In the Add this website to the zone: field, enter *.relayhealth.com.
3. Click Add.
4. Click Close. The Trusted sites window is dismissed.
5. On the Security tab, disable the Enable Protected Mode option in IE8 or later (deselect the check box).
6. Click Apply.

7. Click the Custom level... button.
8. In the ActiveX controls and plug-ins section select the Enable radio button for the following options:
   - Automatic prompting for ActiveX controls
   - Binary and script behaviors
   - Download signed ActiveX controls
   - Run ActiveX controls and plug-ins
   - Script ActiveX controls marked safe for scripting.
   - In the Miscellaneous section select the Enable radio button for the following options:
     - Access data sources across domains
     - Allow META REFRESH
     - Allow scripting of Microsoft web browser control
     - Display Mixed Content
     - Use Pop-up Blocker.
9. In the **Scripting** section select the **Enable** radio button for the following options:
   - Active scripting
   - Allow Programmatic clipboard access (paste operations via script)
   - Scripting of Java applets.
   - Click **OK** to save the settings and return to the Internet Options window.

10. Disable the **Enable Protected Mode** option in IE8 or newer (deselect the check box)

11. Click **Apply** in the **Internet Options** window.

### Content Tab

For HIPAA-related security reasons MatrixCare recommends that you disable the AutoComplete on the Content tab (not required for MatrixCare functionality).

1. Click the **Content** tab, under **AutoComplete**, click **Settings**. The **AutoComplete Settings** window appears.
2. Deselect all check boxes in the **Use AutoComplete** for pane.
3. Click **OK**. The AutoComplete Settings window is dismissed.
**Advanced Tab**

1. In the **Settings** pane, under **Browsing**:
   - Disable the **Reuse windows for launching shortcuts** option (deselect the check box).
   - Disable the **Show friendly HTTP error messages** option (deselect the check box).

2. **Internet Options**

3. In the **Settings** pane, under **HTTP 1.1 Settings**, enable the **Use HTTP 1.1** option (select the check box).
   - In the **Settings** pane, under **Security**:
     - Disable the **Do not save encrypted pages to disk** option (deselect the check box).
     - Enable the **Empty Temporary Internet Files** folder when browser is closed option (select the check box).
     - Enable the **Use SSL 2.0** option (select the check box).
     - Enable the **Use SSL 3.0** option (select the check box).
     - Enable the **TLS 1.0** option (select the check box).

4. On the **Internet Options** window, click **Apply**.

5. Click **OK**. The Internet Options window is dismissed.
Update Internet Explorers Compatibility View List

1. On the Tools menu select Compatibility View Settings.
2. In the Add this website: field, enter the following Web sites, and click Add for each:
   - matrixcare.com
   - achievematrix.com
   - mdiachieve.com
   - relayhealth.com.
3. When finished, click Close. The Compatibility View Settings window is dismissed.

Windows Processor Scheduling and Memory Usage

The following settings below to Microsoft Windows workstation operating systems. To adjust these settings, perform these steps:

1. In Windows, open the Control Panel and select the System icon.
2. Click the Advanced systems settings tab. The System Properties window appears.
3. In the Performance section click Settings. The Performance Options window appears.
4. Click the Advanced tab.
5. In the Processor scheduling pane, under Adjust for best performance of: select the Programs radio button.
6. In the Virtual memory pane, click Change. The Virtual Memory window appears.
   If selected, deselect the Automatically manage paging file size for all drives check box.
7. Click the Custom size: radio button, and enter 3072 in the Initial size and Maximum size fields, then click OK.
8. Click OK. The Performance Options window is dismissed.
9. Click OK. The System Properties window is dismissed.

Security and Performance

The following items can potentially affect the security and performance of Claims Management:

Bandwidth

As stated in the Claims Management System Requirements document, Claims Management is a web-based application, which means that users will experience performance problems if there isn’t enough Internet bandwidth available. As a general rule, MatrixCare recommends investing in an Internet connection that can provide 50 Kbps of upload and download bandwidth to each Claims Management user.

Spyware

Programs that are installed without your consent (when visiting non-MatrixCare websites) can have adverse effects on workstations, such as data mining. MatrixCare recommends that your organization invest in an effective spyware clean-up tool, and use it to periodically check your workstations for unwanted content.
Virus Scanning and Anti-virus Appliances

For security reasons, workstations with access to the Internet should have virus protection. However, use of anti-virus software can potentially block required downloads. Please ensure that your settings comply with the port settings listed in the Claims Management System Requirements document.

Internet Explorer Add-ins

Most third-party add-ins for Internet Explorer can be used with Claims Management. However, some add-ins can cause problems in Claims Management. For example, most pop-up blockers will prevent the report window from appearing. In addition, Internet Explorer toolbars and some screen savers have been known to cause problems.

Other Applications

MatrixCare understands that most Claims Management workstations will be used for additional purposes, such as email and online research. Please be aware of potential conflicts when installing third party applications on a Claims Management workstation.

Microsoft Windows Updates

Microsoft regularly releases operating system updates via the Windows Update Web site and Automatic Updates. Updates are recommended to avoid security-based issues at the workstation level. However, all Internet Explorer browser updates are subject to testing and approval by MatrixCare before implementation. Call MatrixCare Support for details as these updates are released.
Drop It System Requirements

Drop It is a MatrixCare utility that enables automatic uploading of documents into MatrixCare from custom file folders, which saves time by eliminating the need to manually select and upload documents from within MatrixCare. It provides an alternative, more efficient, method to faxing to move resident documents to MatrixCare. It is especially effective for large organizations that upload large numbers of documents via a centralized process.

Drop It enables users to set up folders on local or network drives for automatic upload to MatrixCare. Users can then view, modify, and attach these files to the resident.

Server Hardware and Software Requirements

MatrixCare recommends the following configurations for facilities using the MatrixCare Drop It utility.

Note: These configurations are specific to Drop It and may differ from other MatrixCare system requirements.

Recommended Hardware
- Intel Core i7
- 8 GB memory
- 10/100/1000MB network interface card
- 1024 x 768 desktop resolution (or higher)
- 500GB Storage

Minimum Hardware
- Intel Core i5
- 4 GB memory
- 10/100MB network interface card
- 800 x 600 desktop resolution
- 100GB Storage

Recommended Software
- Windows Server 2008R2 (64-bit)

Minimum Software
- Windows 7 Professional (64-bit)

Note: The Drop It Windows service requires a minimum of 2GB RAM, so this amount of RAM must be available for the service to install and run correctly. In addition, Drop It automatically removes files after 30 days, but based on the number of facility configurations and files transferred within that time period; therefore, the storage needs are subject to change. An internal process should be set up to manage these requirements.

Bandwidth

Due to the nature of transferring large files across the Internet, it is important that the server running Drop It has sufficient bandwidth for this activity. The number of files transferring at any one time is limited, but less than ideal bandwidth could result in reduced network performance.

For additional information, refer to the Drop It Guide on the MatrixCare Client Portal under Global.
MatrixCare Marketing Mobile App Requirements

MatrixCare Marketing is a lead and referral source management, and marketing analysis tool that includes resident tracking functionality. The Mobile version of MatrixCare Marketing provides a sub-set of the full Marketing application functionality for users on supported mobile devices.

The mobile functionality currently supports only the Apple® iPad® device. With this application, users can perform the following tasks:

- Add/Modify Contacts
- Add/Modify Prospects
- Schedule and Complete Lead Activities
- Add/Modify Organizations
- Display Referred Leads
- Add/Modify Organization Notes
- Add/Modify Referrals
- Schedule and Complete Referral Activities
- View reports, including:
  - Completed Activity
  - Marketing Activity
  - Scheduled activity.
  - Apartment Availability

Hardware/Operating System Requirements:

- Requires iPad 2 or newer
- Requires Apple iOS 6.1 or later
- Requires a WiFi and/or Cellular (3G or 4G) connection. There is no offline mode.
MatrixCare Assisted Living KPI Mobile App Requirements

MatrixCare for Assisted Living KPI (Key Performance Indicators) Mobile App is a robust analysis tool that provides community operators with real-time information that enables them to make critical business decisions on the go.

The KPI mobile application is available for both iOS and Android devices, typically a smart phone. It is available for both iOS and Android devices from the Apple Store or Google Play.

Apple Products:
- Hardware compatibility:
  - iPod Touch 4th Generation or newer
  - iPhone 4S or newer
  - iPad Mini, iPad 2 or newer
- Requires Apple iOS 6.1 or later
- Requires iTunes account.

Android Products:
- Requires Android OS Version 4.3 or later.
MatrixCare Analytics Requirements

MatrixCare Analytics extracts data from MatrixCare and enables you to develop valuable dashboards, reports, charts, and graphs that capture the pulse of your business, helping you to make better business decisions and improve your bottom line. See the MatrixCare Web site for more details.

Following are the system requirements that are specific to MatrixCare Analytics.

Software Requirements

- We recommend Internet Explorer 9 or later, but Analytics also support the current versions of other browsers such as: Google Chrome, Mozilla Firefox, or Apple Safari.
- We recommend Excel 2013 because it provides additional functionality, and we support Microsoft Excel 2010. We also recommend the following:

  Note: For information about how to enable the functionality for these Add-ins, click the links below to go to the Microsoft Web site.

  - PowerPivot Excel Add-in for Excel 2013, or for Excel 2010 you must Download and Install the Add-in.
  - PowerView Excel Add-in for Excel 2013 (not compatible with Excel 2010)
  - PowerMaps Excel Add-in for Excel 2013 (not compatible with Excel 2010)

Update Internet Explorers Compatibility View List

1. On the Tools menu select Compatibility View Settings.
2. In the Add this website: field, enter the Web site https://analytics.matrixcare.com, and click Add.
3. When finished, click Close. The Compatibility View Settings window is dismissed.

  Note: If you use browsers other than Internet Explorer, you should add this URL to their allowed Web sites.