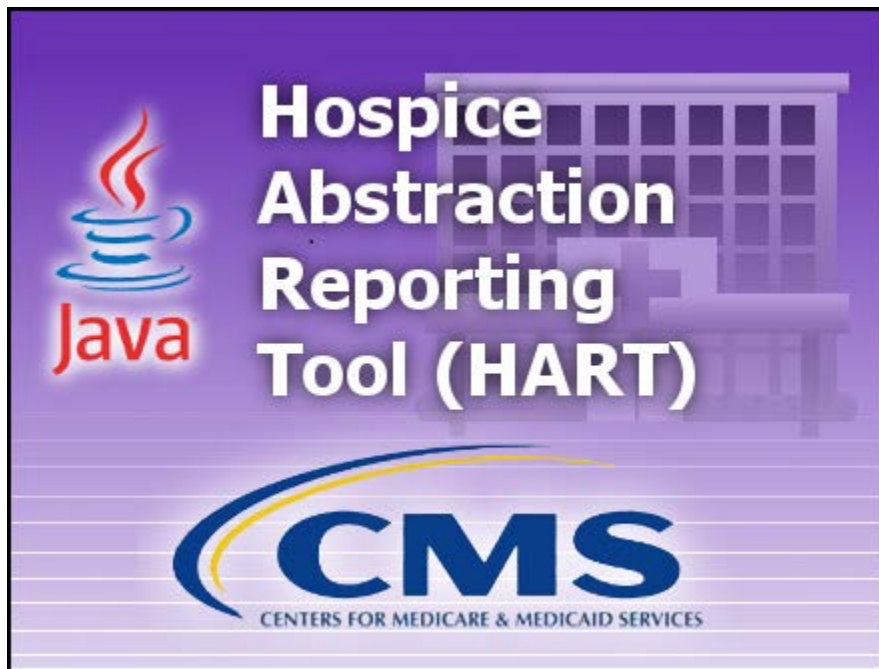


# HOSPICE ABSTRACTION REPORTING TOOL (HART) INSTALLATION GUIDE

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*IN SUPPORT OF SOFTWARE VERSION 1.7.0 (January 2021)*



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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 of the user functionality found in HART as well as the Help and Security features.

Please note, all screen shots included in this reference material are meant for sample purposes only and contain only test data. Due to updates made after the release of this document, detailed information displayed within screen shots may not be an exact representation; i.e. Build\_ID and/or information posted to the CMS or QTSO websites.

The iQIES Help Desk is also available for technical support and assistance if needed and may be contacted by phone at 800-339-9313 or email to [iqies@cms.hhs.gov](mailto:iqies@cms.hhs.gov).

## 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.

### Hardware/Software Specifications

The Minimum and Recommended System Requirements may be found on the QIES Technical Support Office website: <https://qtso.cms.gov/reference-and-manuals/minimum-system-requirements-home-health-agencies-hospice-providers-long-term>

### Security

Making information security one of your organization's core values ensures the prevention of unauthorized viewing of Personally Identifiable Information (PII) or Protected Health Information (PHI).

It is important that providers work with their Information Technology (IT) team or other resources to build a security-minded organizational culture which enforces strong authentication and access controls as well as limits physical access to devices (e.g., laptops, handhelds, desktops, servers, thumb drives, CDs, backups) containing PII or PHI data.

CMS recommends that providers encrypt the hard drive of any electronic device which has access to data containing PII or PHI, such as exported HIS records. Once HIS records have been exported from the HART application the data will no longer be encrypted. It is also recommended that those electronic devices, which contain PII or PHI, be physically secured and locked (password protected) when not in use.

### Windows Settings

In order to ensure the reliable operation of the HART software application use of a supported Microsoft Windows operating system is imperative. The Font Size property must be set to "Small Fonts". This property can be found under the Settings tab of desktop properties: Start\Control Panel\Appearance and Personalization\Display\.

# Software Downloads

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

CMS Website: <https://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/Hospice-Quality-Reporting/HIS-Technical-Information.html>

QTSO Website: <https://qtso.cms.gov/software/hart>

# Installation Types

There are two (2) types of installations available for HART. This guide may be used to assist with the installation and setup of both types of the HART application.

## Standalone

The Standalone installation is self-contained on one workstation.

## Network Client

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

- Servers hold the central database and must utilize the Server installation file first.
- Network Clients are placed on the users individual workstations which then access the database on the Server. The Network Client is installed after the Server installation has been successfully completed.

**Please Note:** The Standalone and Client installations use the same install file (.exe). There is a point in the installation process where the user must select one or the other: Standalone or Client.

## Best Practices

While it is possible, it is not recommended to have both the Standalone and Network Client configurations of the HART application installed on the same workstation. It is also not recommended that the Server be installed on the same workstation as the Network Client. ALL Network Client applications should be closed when upgrading a Server installation or restoring a database. ALL Network Client applications should be upgraded to the most current version prior to logging into the application once the upgrade process has begun. When possible, upgrade incrementally, and do not skip installation versions. Failure to comply with these recommendations may result in loss of data.

## Server Installation

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

**Note:** 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.

**Tip:** The server software has not changed so if you already have HARTServerSetup-1.3.0 installed, you should proceed to the “Standalone & Client Installation” section.

On the database server, complete the following steps to install:

1. Click the HARTServerSetup-1.3.0.exe.  
The ‘File Download’ window will display.
2. Click ‘Run’ to begin the installation.

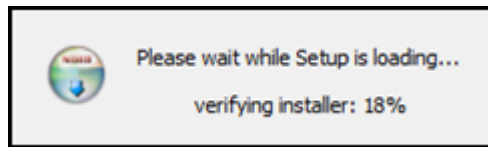
**Please Note:** You may click ‘Save’ to download the install file to the workstation for installation at a later time. If install files are saved to the workstation, double click the Setup file to begin the installation.

## Hospice Abstraction Reporting Tool (HART) Installation Guide

The Windows 'User Account Control' window will display the following question: "Do you want to allow the following program from an unknown publisher to make changes to this computer?"

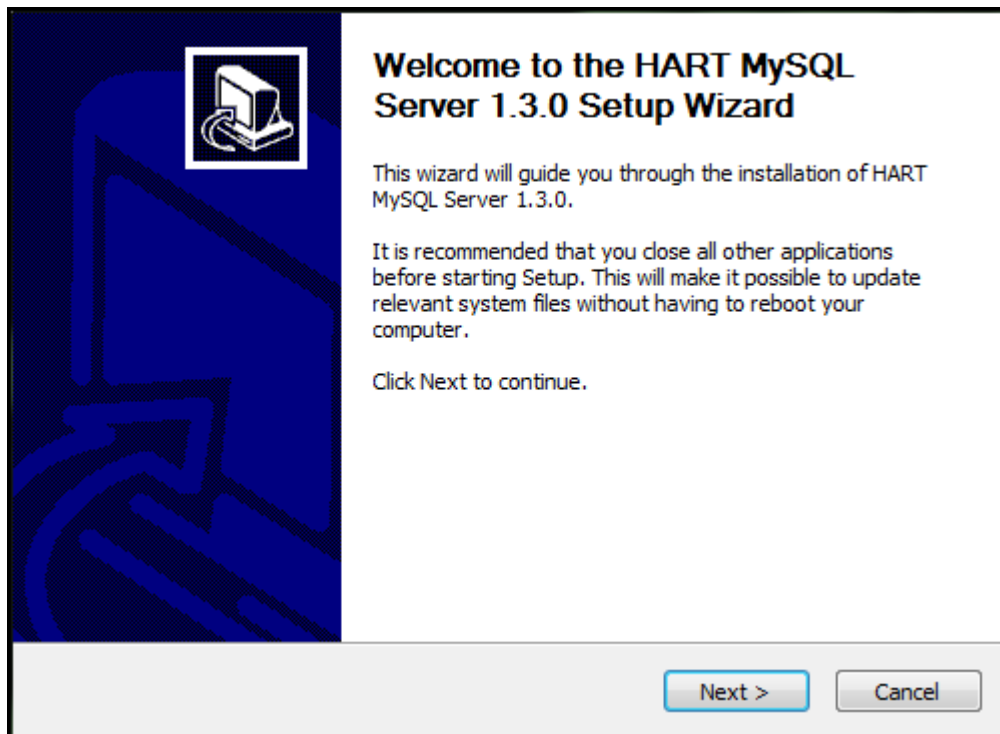
3. Select 'Yes' to continue the setup.

The 'Setup is loading' message displays.



The 'Welcome to the HART MySQL Server 1.3.0 Setup Wizard' displays.

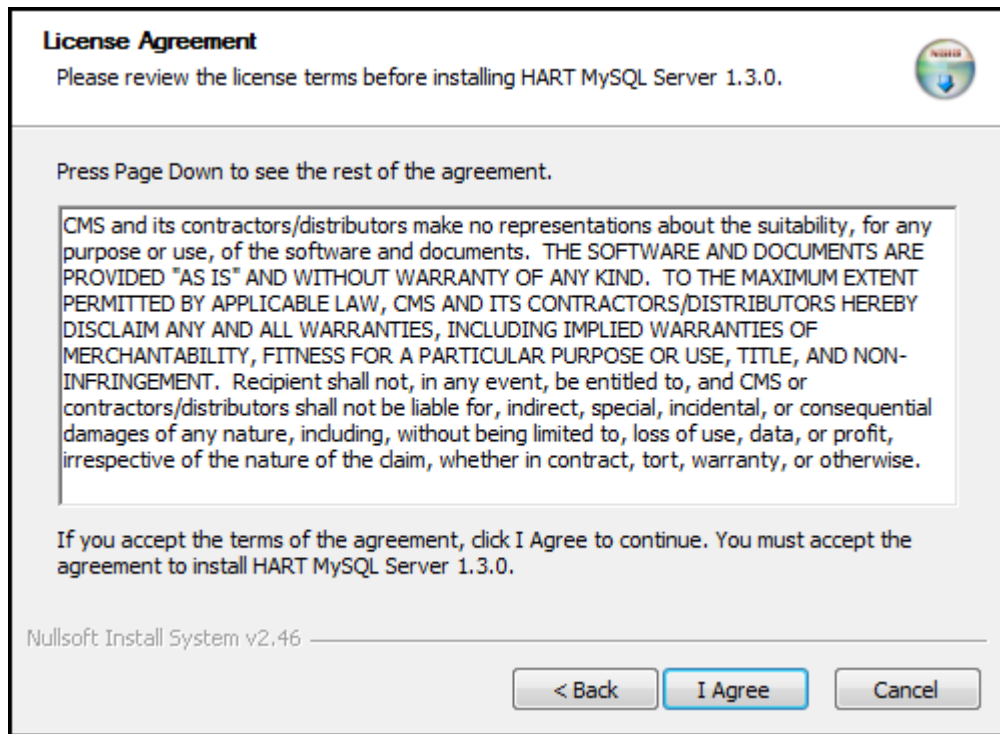
This wizard will guide you through the installation of HART MySQL Server 1.3.0. It is recommended that you close all other applications before starting Setup. This will make it possible to update relevant system files without having to reboot your computer.



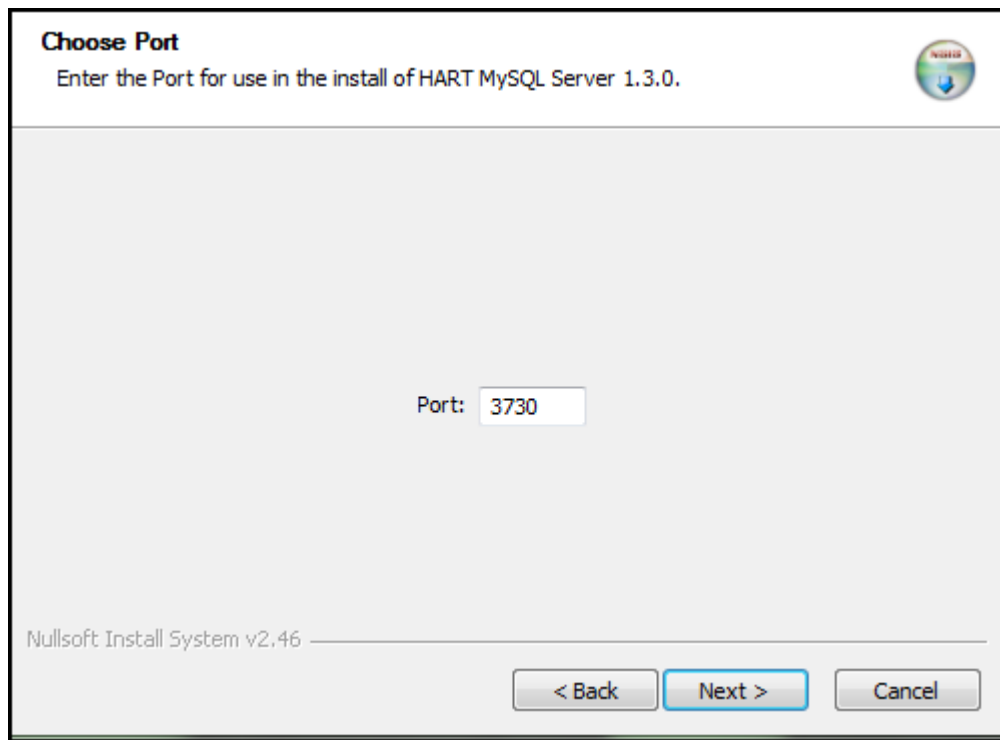
4. Click 'Next' to continue the setup.

The 'License Agreement' screen displays. Please review the license terms before installing HART MySQL Server 1.3.0.

## Hospice Abstraction Reporting Tool (HART) Installation Guide

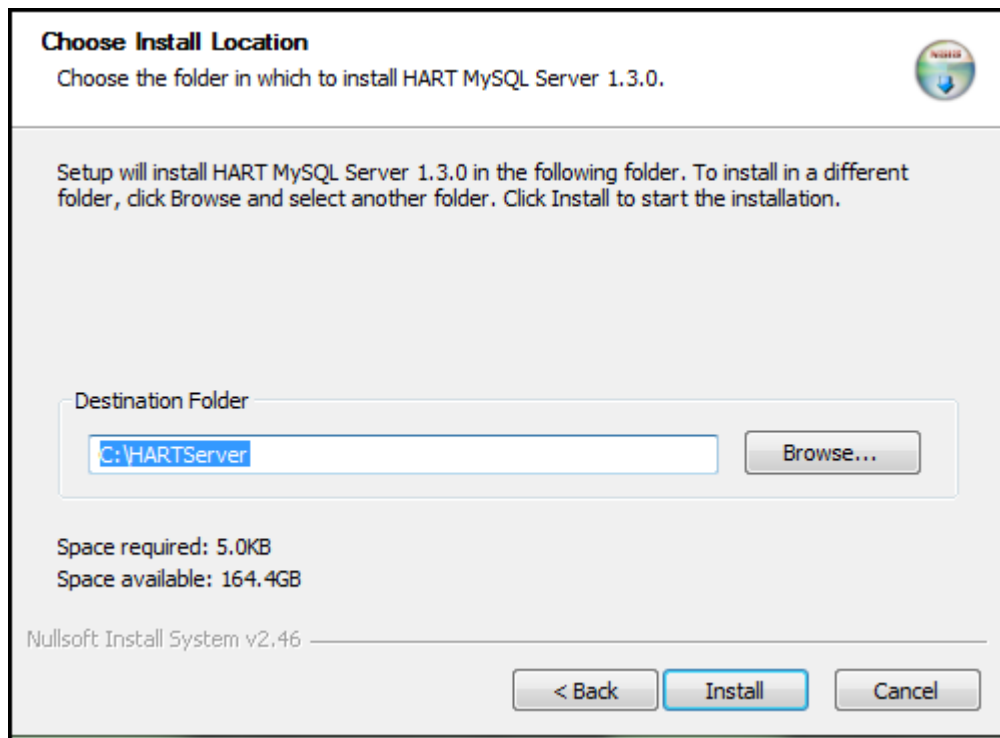


5. If you accept the terms of the agreement, click 'I Agree' to continue. You must accept the agreement to install HART MySQL Server 1.3.0.  
The 'Choose Port' screen displays.
6. Enter the port number for use in the install of HART MySQL Server 1.3.0. The default port number is 3730.



7. Click 'Next' to continue.  
The 'Choose Install Location' screen displays. Choose the folder in which to install HART MySQL Server 1.3.0.

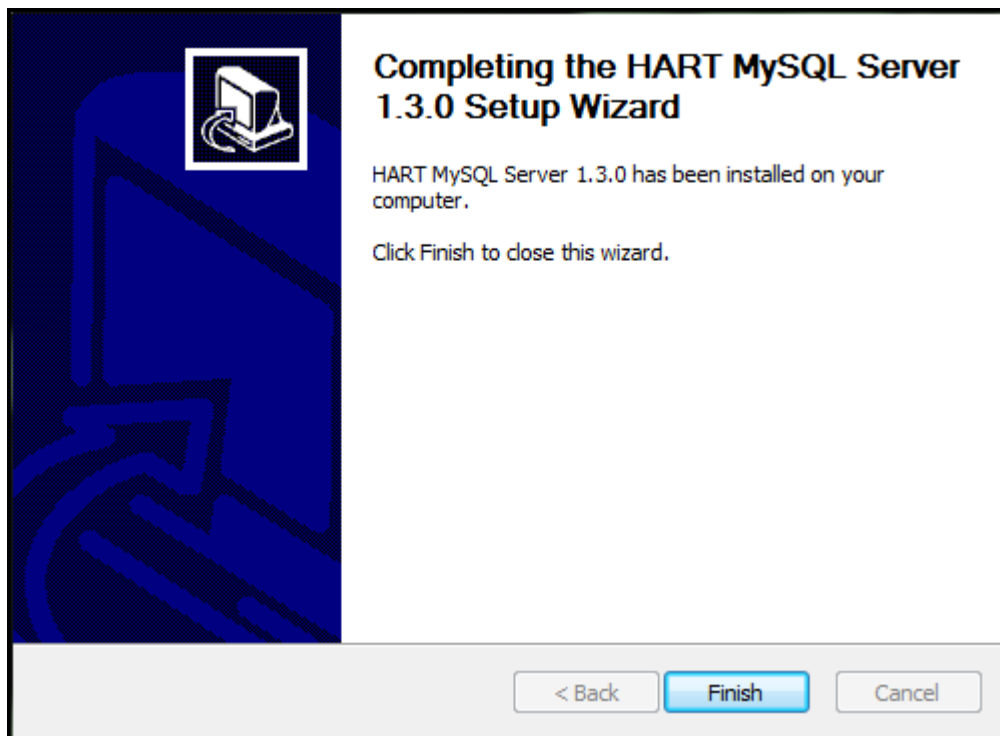
## Hospice Abstraction Reporting Tool (HART) Installation Guide



Setup will install HART MySQL Server 1.3.0 in the following folder. To install in a different folder, click 'Browse' and select another folder. You may also manually type in a location.

8. Click 'Install' to begin the installation. A progress bar on the Installing screen allows the User to monitor the progress.

The 'Completing the HART MySQL Server 1.3.0 Setup Wizard' displays.



9. Click 'Finish' to complete this portion of the installation process.

## Hospice Abstraction Reporting Tool (HART) Installation Guide

**Please 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 Network/Client installation process is complete.

Go to the Standalone & Client Installation section.

### Standalone & Client Installation

Complete the following steps to install the Standalone OR Client version of HART 1.7.0:

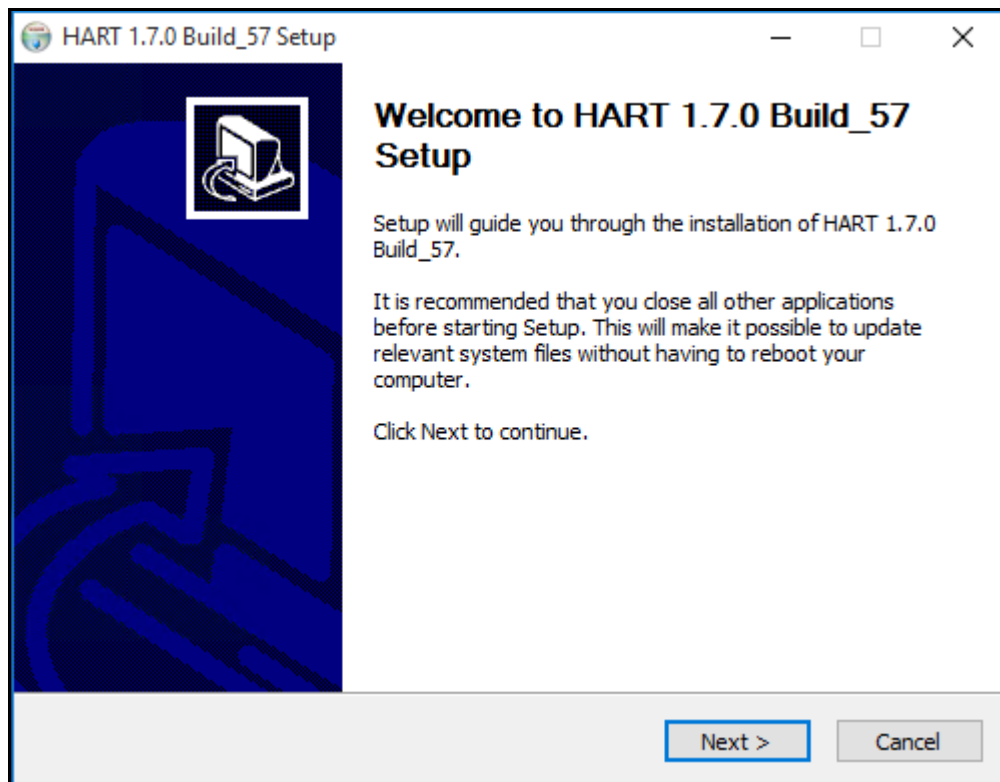
1. Click on the HARTSetup-1.7.0.exe.  
The 'File Download' window will display.
2. Click 'Run' to begin the installation.

**Please Note:** You may click 'Save' to download the install file to the workstation for installation at a later time. If install files are saved to the workstation, double click the Setup file to begin the installation.

The Windows 'User Account Control' window will display the following question: "Do you want to allow the following program from an unknown publisher to make changes to this computer?"

3. Select 'Yes' to continue the setup.

The 'Welcome to the HART 1.7.0 Build\_57 Setup Wizard' screen displays. This wizard will guide you through the installation of HART 1.7.0. 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.

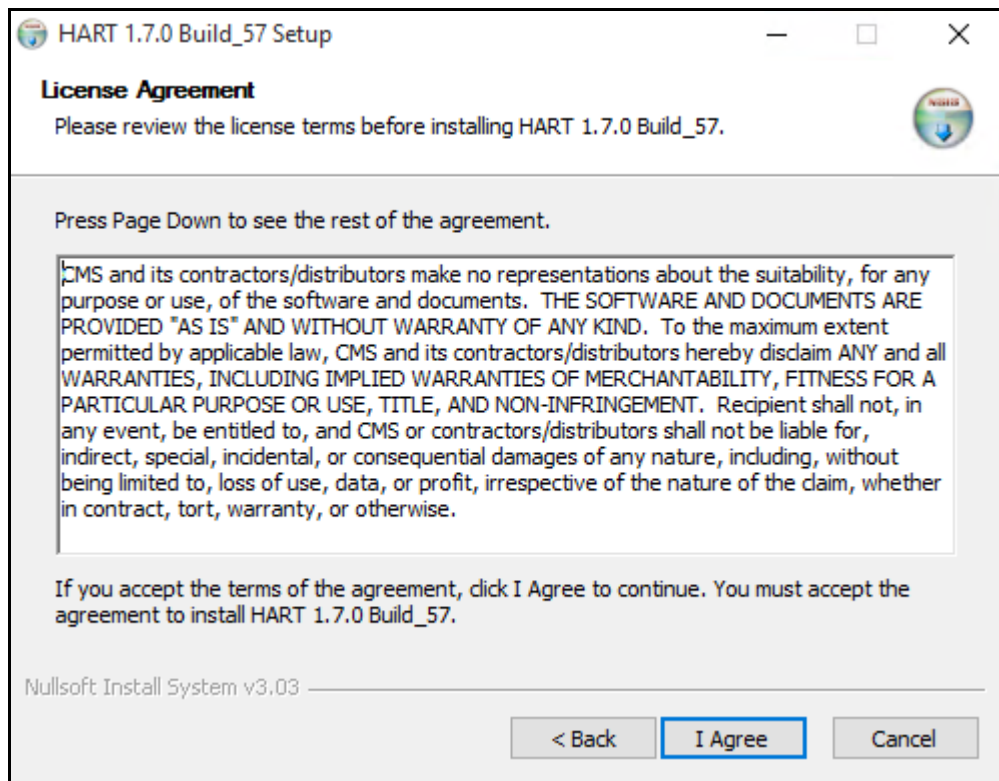


4. Click 'Next' to continue.

The 'License Agreement' screen displays. Please review the license terms before installing HART 1.7.0.



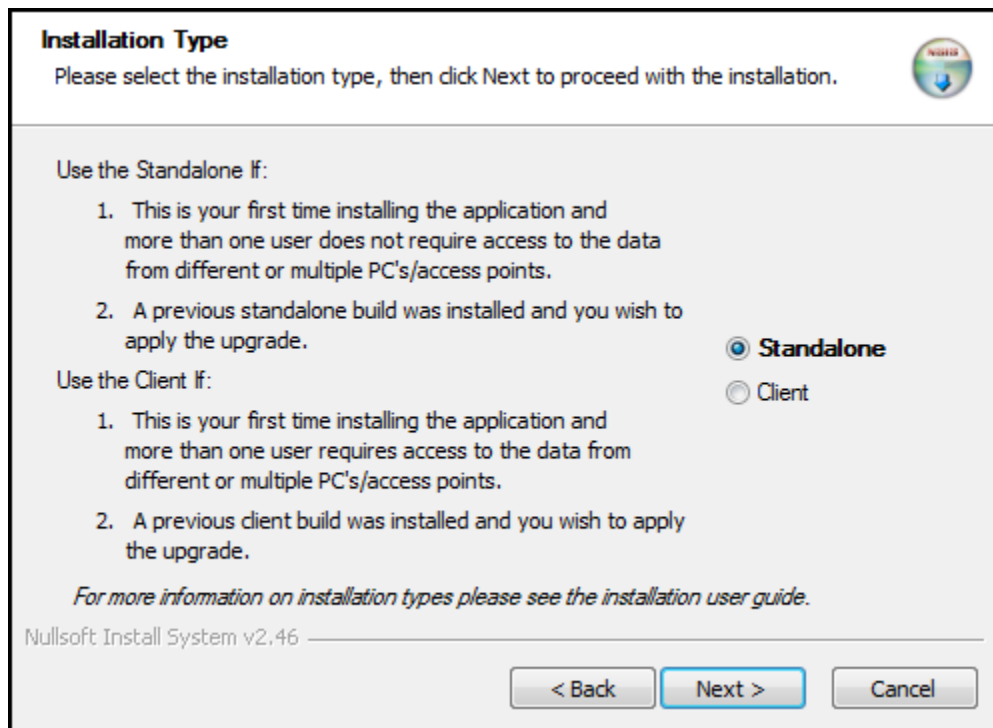
## Hospice Abstraction Reporting Tool (HART) Installation Guide



5. If you accept the terms of the agreement, click 'I Agree' to continue. You must accept the agreement to install HART 1.7.0.

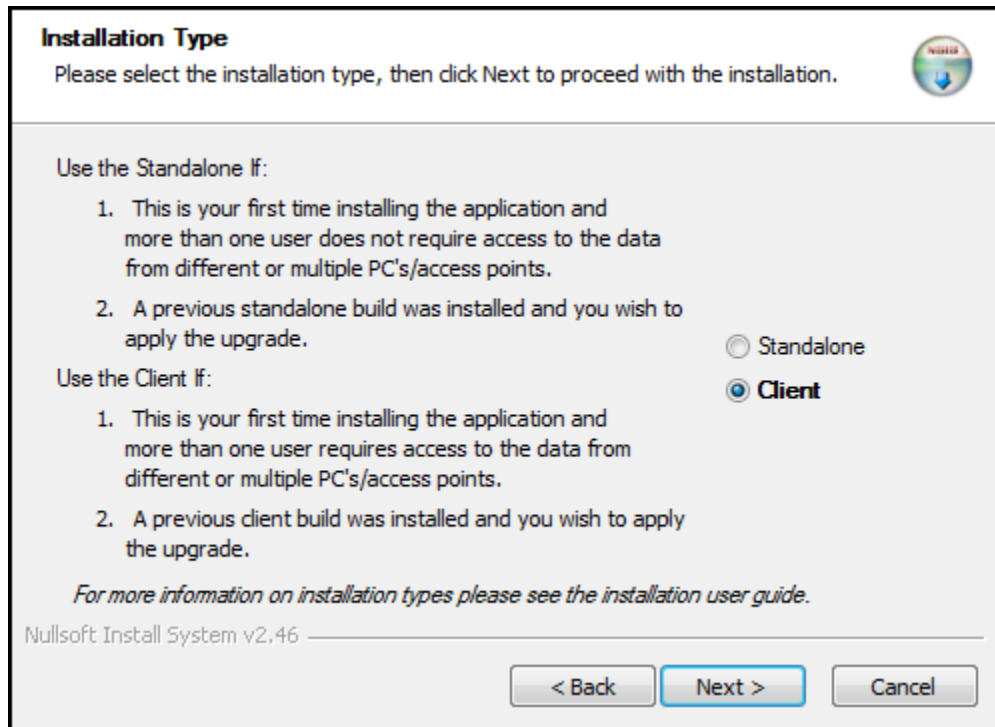
The 'Installation Type' screen displays. Please select the installation type.

- 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."



## Hospice Abstraction Reporting Tool (HART) Installation Guide

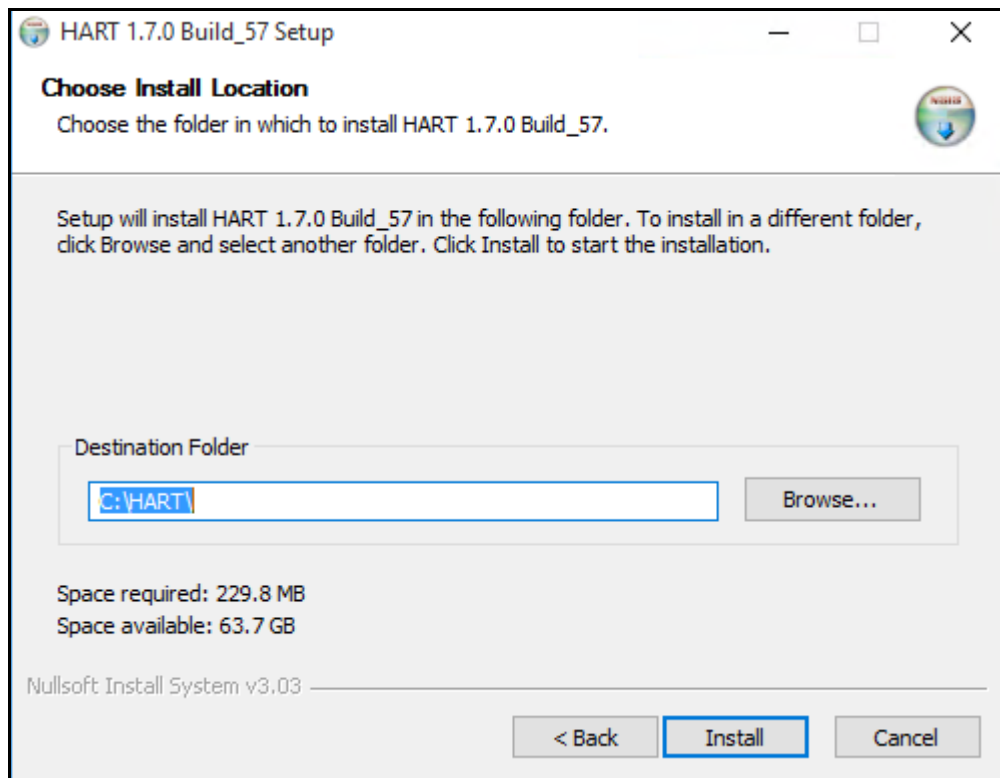
- Use the Client if:
  1. “This is your first time installing the application and more than one user requires access to the data from different or multiple PC’s/access points.”
  2. “A previous client build was installed and you wish to apply the upgrade.”



6. Click 'Next' to proceed.

The 'Choose Install Location' screen displays. Choose the folder in which to install HART 1.7.0.

Setup will install HART 1.7.0 in the Destination Folder. To install in a different folder, click 'Browse' and select another folder. You may also manually type in a location.



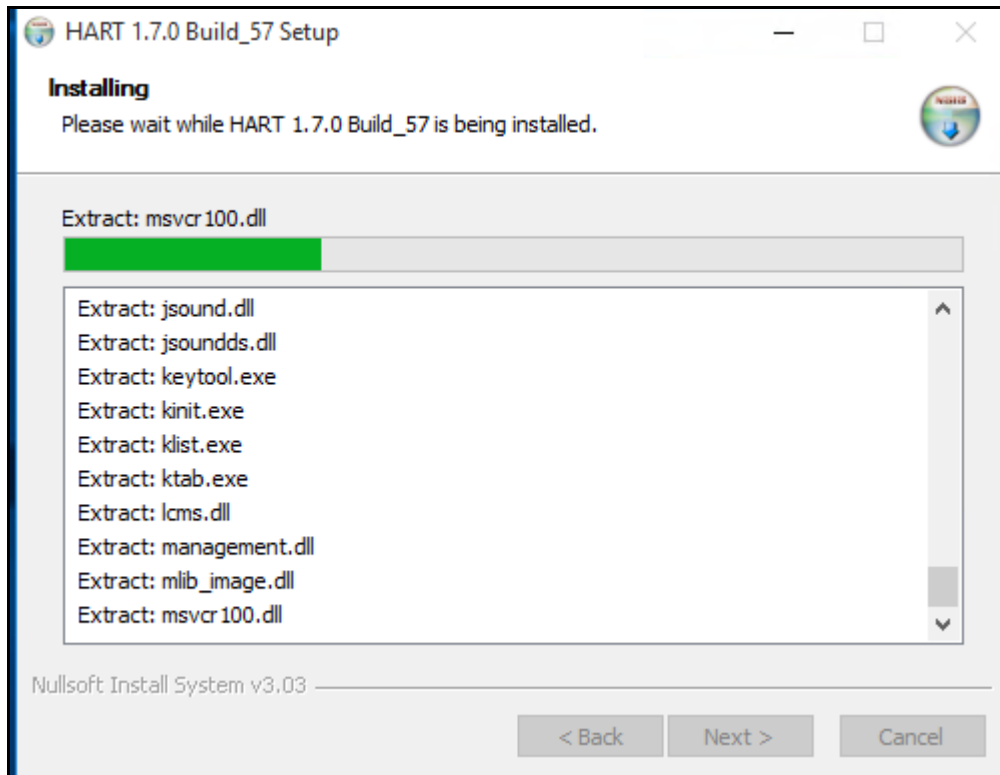
## Hospice Abstraction Reporting Tool (HART) Installation Guide

**TIP:** The Standalone default install location will be: c:\HART. The Client default install location will be: c:\HARTClient.

7. Click 'Install' or to start the installation.

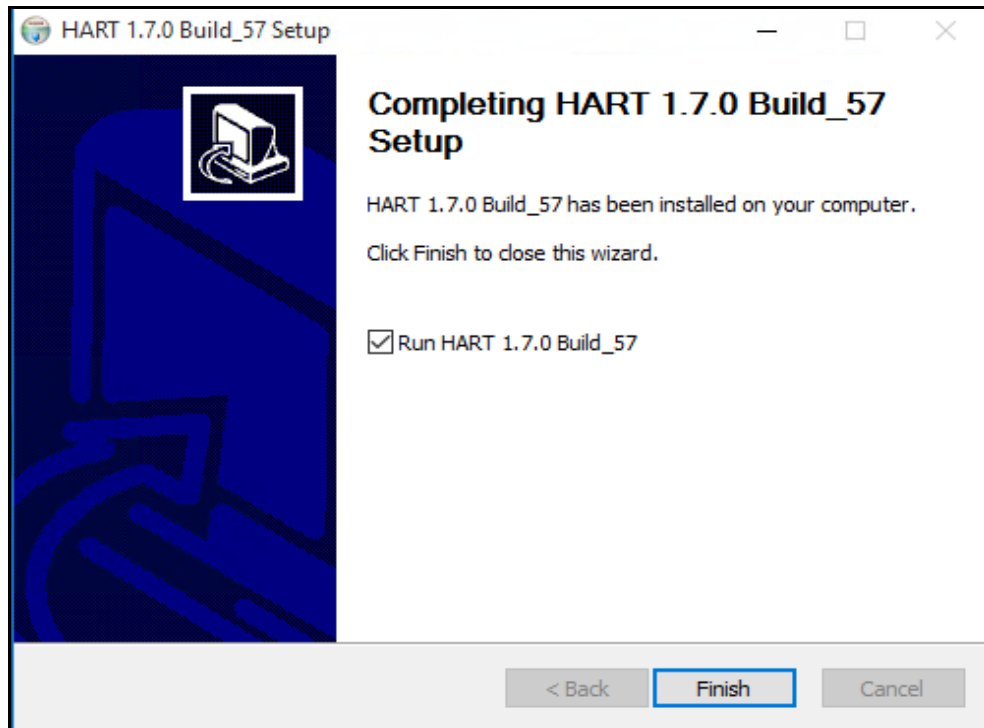
**Please Note:** The install process itself determines whether a full install or an upgrade to the software is needed based on what has already been installed on the workstation. The User will be shown a decision message if they select an installation type that is different from one that has already been installed; i.e., "You currently have the Standalone version installed on your computer, are you sure you would like to proceed with the Client install?"

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



When the install is complete the 'Completing the HART 1.7.0 Setup Wizard' displays. A completion screen with 'Run' checked will auto-launch the application.

## Hospice Abstraction Reporting Tool (HART) Installation Guide



8. 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.

### Default User and Initial Setup

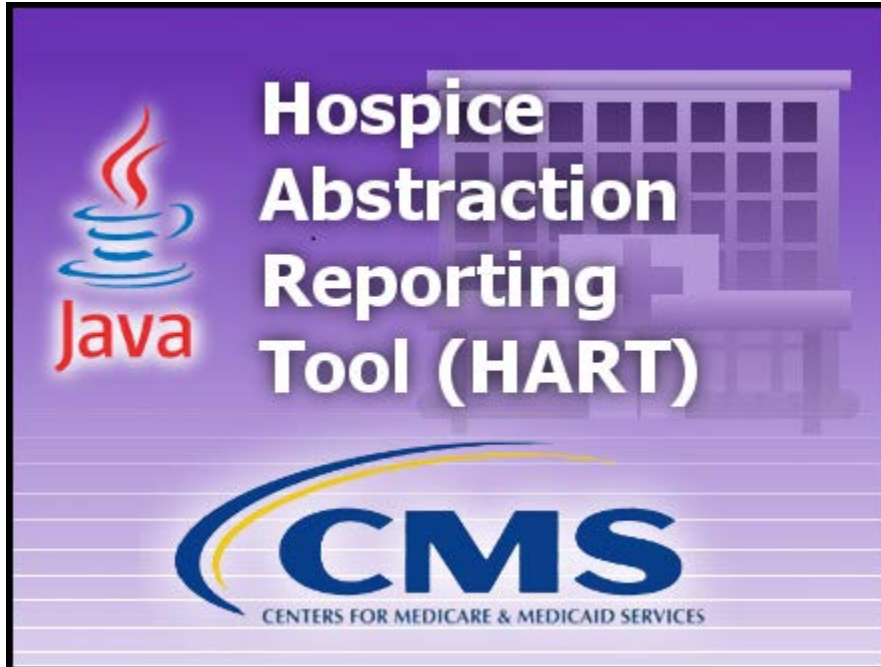
**ATTENTION!** The Default User **MUST** complete the initial setup before any further data entry may begin. The User signing into the software for the first time will be referred to as the 'Default User'.

Complete the following steps to set up HART 1.7.0:

1. Click the HART or HART Client icon on the desktop to launch the application.

## Hospice Abstraction Reporting Tool (HART) Installation Guide

The HART splash screen displays momentarily.



The Login pop-up window is displayed.

**Please Note:** If you have chosen the Network Client configuration of HART you will be prompted for the Server Name (server IP address) and Port (default 3730) prior to the Login pop-up window being displayed. You **MUST** enter the Server Name and Port to continue successfully. 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.

User ID

Password

Enable Accessibility Features

### Default User ID/Password

The Default User ID and Password will be HART's lower-case acronym. They are case sensitive:

- Default User ID : hart
- Initial Default Password: hart

1. Enter the default User ID and Password; click 'Login'.

The 'Change Password' screen displays as follows:

- 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 characters:

## Hospice Abstraction Reporting Tool (HART) Installation Guide

- 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.

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

2. Enter a new password in the 'New Password' and 'Confirm New Password' fields. The password is case sensitive and must match in both fields. This will be the password that will now belong with the Default User ID, hart.

3. Select 'Continue' to complete the login process.

**Please Note:** When 'Cancel' is clicked, the following message will be displayed: "You must change your password before accessing the system. If you do not change your password, you will be logged off the system".

Clicking 'Cancel' on this pop-up will take the User back to the previous 'Change Password' pop-up.

Clicking 'OK' takes the User to the login screen where they must re-enter the Default User ID and Initial Default Password.

4. The 'Security Questions' screen displays as follows:

- "What city were you born in?"
- "What year did you graduate from high school?"
- "What is your favorite sport?"
- "What was the make of your first car?"
- "What was the color of your first car?"
- "What is your mother's maiden name?"
- "What was the name of your first pet?"
- "What size shoe do you wear?"
- "What is your favorite season of the year?"
- "What is your favorite movie?"

## Hospice Abstraction Reporting Tool (HART) Installation Guide

To enable the OK button, a minimum of 6 answers is required.

What city were you born in?

What year did you graduate from high school?

What is your favorite sport?

What was the make of your first car?

What was the color of your first car?

What is your mother's maiden name?

What was the name of your first pet?

What size shoe do you wear?

What is your favorite season of the year?

What is your favorite movie?

5. Complete the answers to at least six (6) questions of your choice. Then tab forward.
6. Click 'OK' to continue with the initial setup. The password for the Default User account has now been changed.

### Initial Setup


The following sections provide basic steps on completing the initial setup of the HART application. For detailed instructions on adding Facility or System Administrator data please refer to the following sections in the HART User Guide:

- Facility Setup
- User Setup

### Add a Facility

The Default User must create at least one Facility before being permitted to add any further data to the HART application.


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 into the fields listed on the right side of the screen
4. After the required Facility information has been entered, click the 'Save'  icon at the upper left corner of the screen.
5. Saved Facility information will display in the 'Facility Summary' section on the left side of the screen.

### Add a System Administrator User

The Default User must create at least one System Administrator User before being permitted to add any further data to the HART application. It is highly recommended to set up more than one System Administrator User. In the event the primary System Administrator User's account becomes locked, the second System Administrator will have the ability to unlock the primary account.

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 the appropriate User data into the fields listed on the right side of the screen. Required fields display on the screen in bold type with an asterisk.
4. After the required User information has been entered, click the 'Save'  icon at the upper left corner of the screen.

## Hospice Abstraction Reporting Tool (HART) Installation Guide

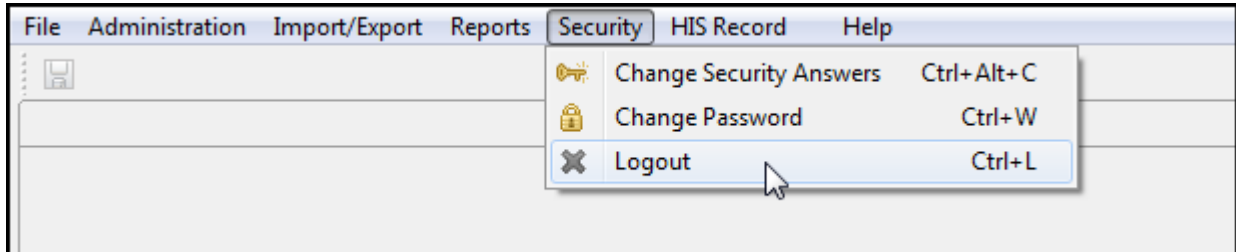
5. Saved User information will display in the 'User Summary' section on the left side of the screen.

### First Login

After successfully adding at least one System Administrator the Default User must log out of the application. **The newly created System Administrator User must login to display the full HART menu.**

Complete the following steps to logout the Default User and login as the System Administrator:

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



The login pop-up window displays.

2. Enter the newly-created System Administrator User ID into the User ID field.
3. Enter the same newly-created System Administrator User ID into the Password field.

**Please Note:** The User ID and Password are case sensitive and MUST match when logging in for the first time. An example of the first login is shown below.

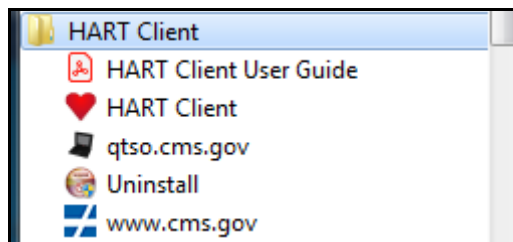
- System Administrator User ID : Admin1
- Initial System Administrator Password: Admin1

## Uninstalling the Software

### Windows - All Programs

Complete the following steps to uninstall the HART Standalone OR Network Client/Server application via 'Start – All Programs':

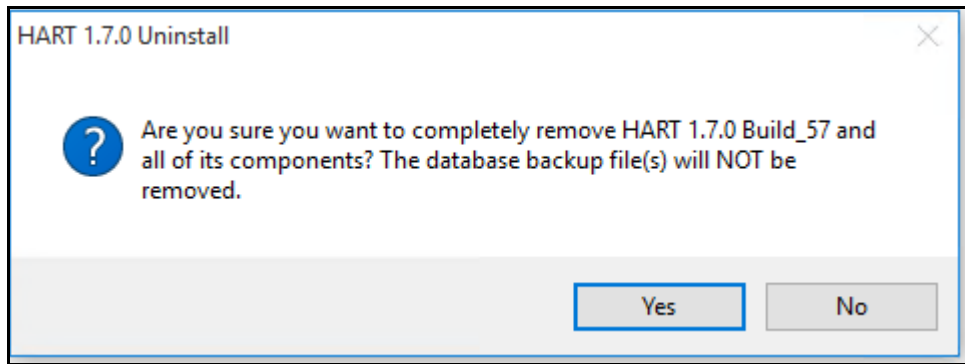
1. Select 'Start'.
2. Select 'All Programs'.
3. Select HART from the list of program folders. The User will find the following list after selecting HART:
  - HART User Guide (or HART Client User Guide if using client server setup)
  - HART (or HART Client)
  - Uninstall
  - [www.cms.gov](http://www.cms.gov)
  - <https://qtso.cms.gov>



1. Select 'Uninstall'.
2. A decision message will display the following question: "Are you sure you want to completely remove HART 1.7.0 and all of its components? The database backup file(s) will NOT be removed."

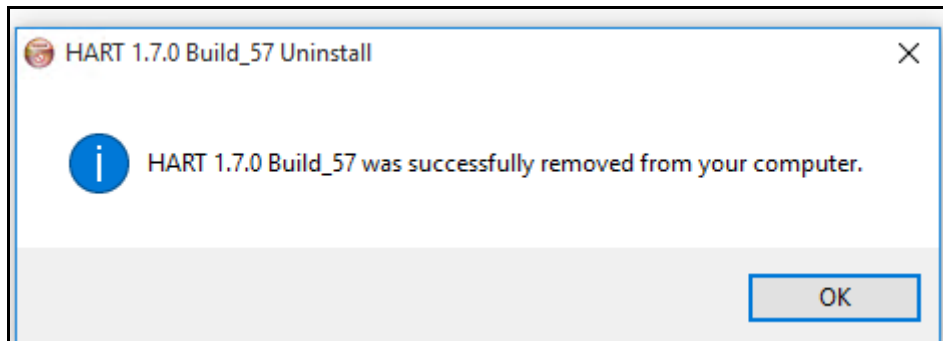


## Hospice Abstraction Reporting Tool (HART) Installation Guide



3. Click 'Yes' if you wish to continue with the uninstall process. The progress bar will illustrate the progress of the uninstall process.

When complete, a final message will be displayed: "HART 1.7.0 was successfully removed from your computer."



4. Click 'OK'.

### Windows - Control Panel

Complete the following steps to uninstall the HART Standalone OR Network Client/Server application via the Windows Control Panel:

1. Select 'Start'.
2. Select 'Control Panel'.
3. Select 'Programs and Features'.
4. Double-click on the installation you wish to remove.
5. Follow the instructions to complete the uninstall process.

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