



# Upgrade Process Checklist:

The following checklist contains a few items to take into consideration before performing the update to the current release:

- 1** [Review system requirements](#)
- 2** **Optional:** If you currently have an IT technician who performs your updates, please contact them before proceeding.
- 3** Allow enough time to perform the update, we recommend preferably outside of business hours or weekends.
- 4** Perform a full [MedicalDirector Backup](#).
- 5** **Optional:** If you are a mobility user, please upload all data prior to update.   
*/* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 6** Make sure that all MedicalDirector Software is closed on each machine.
- 7** Ensure Antivirus and Firewall software has been disabled for the installation and re-enabled once the install is complete.
- 8** Once installed successfully on the server, you can install the update on your workstations.
- 9** Open **MedicalDirector Clinical** and ensure you can view and save letters and documents. Open **MedicalDirector PracSoft** and ensure you can perform an OPV check as well as check that your Daysheets reflect the last working day's billing.