



6114 La Salle #230 • Oakland CA 94611
510.654.3268 • www.trigram.com

UPGRADE & PROGRAM DISCLOSURES

The decision to purchase practice management software is a very important one, and we want to be as clear as possible about what is involved in upgrading to and owning the new AcuBase Pro.

Please review the following disclosures and acknowledge that you have read them by signing at the bottom of the page. If you received this document via e-mail or some other online means, please email us at support@trigram.com, with "Disclosure" in the Subject field, writing that you have read and understand this Upgrade & Program Disclosure and do still wish to purchase the program.

Disclosures

Program Renewal

Like many professional, mission-critical database programs, AcuBase Pro is licensed on an annual basis. When you purchase the program, you are purchasing a license to use the program for a year from your date of purchase. After a year of use, AcuBase Pro will ask you to enter a new license code in order to continue using the program. You may purchase new licenses through our website's Purchase link at <http://www.trigram.com>, or by contacting us at support@trigram.com or at 1.888.4ACUBASE (1.510.654.3268). At your request, we can also keep your credit card on file and auto-renew you at the end of each licensing period. After your initial purchase of the program, you will not need to renew your license for one year, and renewal will be at a substantially lower price than you bought the program at (at the time of this writing, the program price for a single user is \$495, and renewals are \$295). If, at the end of your year of use, you decide to let the program license expire, the program will ask for a new license or close until a new license number is entered.

Upgrade Considerations

If you are upgrading from a previous version of AcuBase to the new AcuBase Pro, we want you to be aware that some parts of your data may not transfer. Bringing data forward from older programs into newer ones is perhaps one of the greatest challenges in creating and maintaining software over time. We have done our very best to be sure all of the most important data from your older version of AcuBase have been brought over to this latest version. Due to the structure of the new program, several aspects of old data may not move over to the new program and may need to be edited or re-entered once you begin using the program. For this reason, and for good accounting, we recommend that you keep your older version of

AcuBase installed on your computer and backed up for reference, noting for yourself the date you stopped using the older program and began with the new.

Data transfer issues may include:

- Activities preferences: The default call, office visit, progress report, etc. templates you created in the Preferences section of the previous program may need to be re-entered in the current version's Preferences section.
- CMS (HCFA) form preferences for a given case or invoice: The check boxes and some fields on CMS forms will need to be re-entered. The easiest way to deal with this is to simply check each patient's case and/or invoice preferences when you are working with them, rather than going through the whole program to correct issues of pre-existing invoices which you may never need to access again.
- Phone/E-mails: Most phone numbers and e-mail addresses for patients should come over, but vendors, insurance companies, and referral sources may have several different numbers, and not all may move over.
- Financial Information: This new version of AcuBase Pro separates out Products and Procedures into separate databases in the program. While all financial data should come over without a problem, note that reports may show numbers slightly differently if products were included in a given invoice. Look for separate "Products" and "Procedures" totals on reports.
- Other Data: Since every person keeps different data in their own fashion, there is no way for us to know all of the ways that data may come across into a new database structure. There may be data beyond what we list here that is missing or not in the location you expected to find it.

I have read and understand the above Program Renewal and Upgrade disclosures before purchasing AcuBase Pro.

Name (Printed)

Signature

Date