Best Practice
An evolution in medical software

Bp Premier Clinical Setup Guide

Bpknowledgebase

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Last updated: June 2017

This User Manual is sourced from the Best Practice Software Bp Premier Lava **Knowledge Base**.

Setting up the Clinical module for the first time

After you have installed Bp Premier for the first time, or converted from an existing clinical software package, you must apply some basic configuration to start using Bp Premier. The following provides an overview on how to set up the components of the Clinical module. Before you begin:

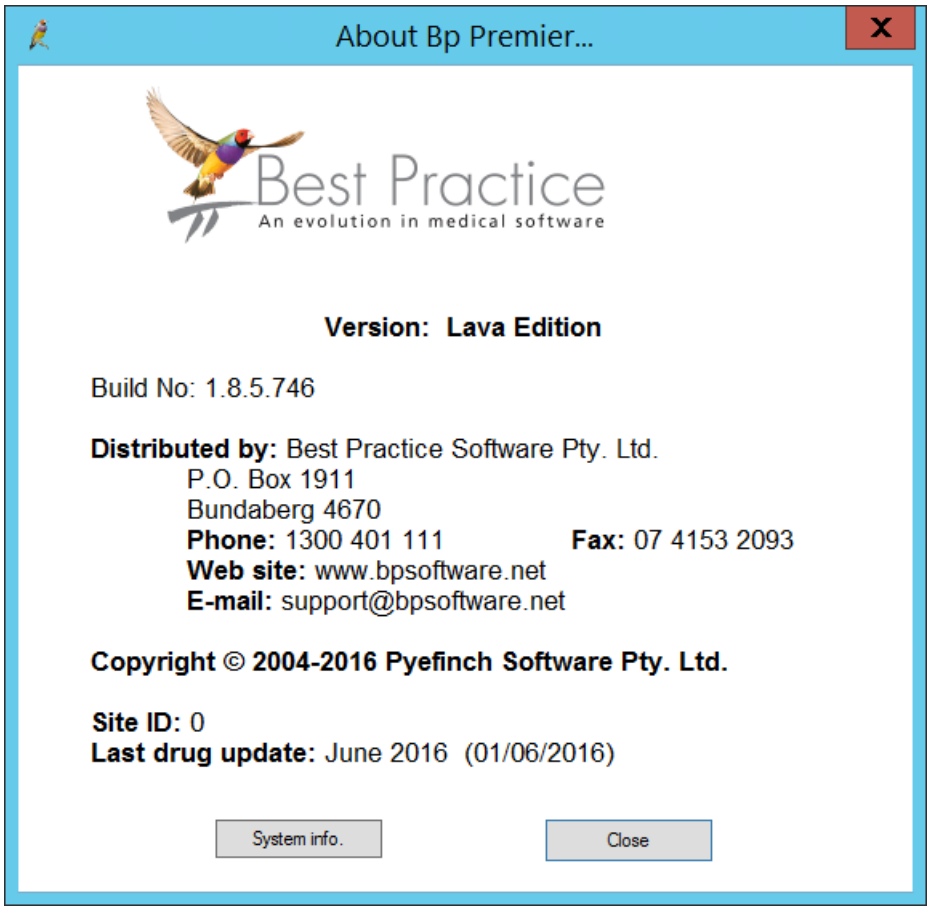
- enter a valid Bp Premier licence key into the server. If you do not have a licence key, contact General Products Support on 1300 401 111.
- log in to Bp Premier on the server and each workstation to confirm the connection to the Bp Premier server.

Complete each section in sequence.

UPDATE THE PROGRAM AND DRUG DATABASE VERSION

Check that you have the latest drug database version installed.

To check, select **Help** > **About**. The **About Bp Premier** screen will appear.



Program Version

The installed program version is shown in bold at the top of the screen. Check this against the program update section on our website www.bpsoftware.net. If any newer program versions available, you may want to upgrade your current Bp Premier installation.

If you are upgrading to Bp Premier Lava Edition or later, significant changes to the software have been made that will affect your practice's workflows. You must review the Lava release notes and upgrade checklist before upgrading to the Lava edition. The following documents are available from the Bp Premier **Knowledge Base**:

- Bp Premier Lava Release Notes
- Bp Premier Upgrade Checklist - Lava
- Upgrading to Lava from the DVD.

Drug Database Version

The last drug database version is shown in the **Last drug update** field. Check this date against the data update section of our website www.bpsoftware.net and if any newer data updates are available, download them in chronological order and install to the server only. See **Updating the drug database** in the Bp Premier Knowledge Base for more information.

Following an update

After each update, select **Help** > **About** again to ensure that the updated version is now shown.

ENTER PRACTICE DETAILS

If you have converted your data into Bp Premier from another package, the **practice details** will contain the same information as the old system.

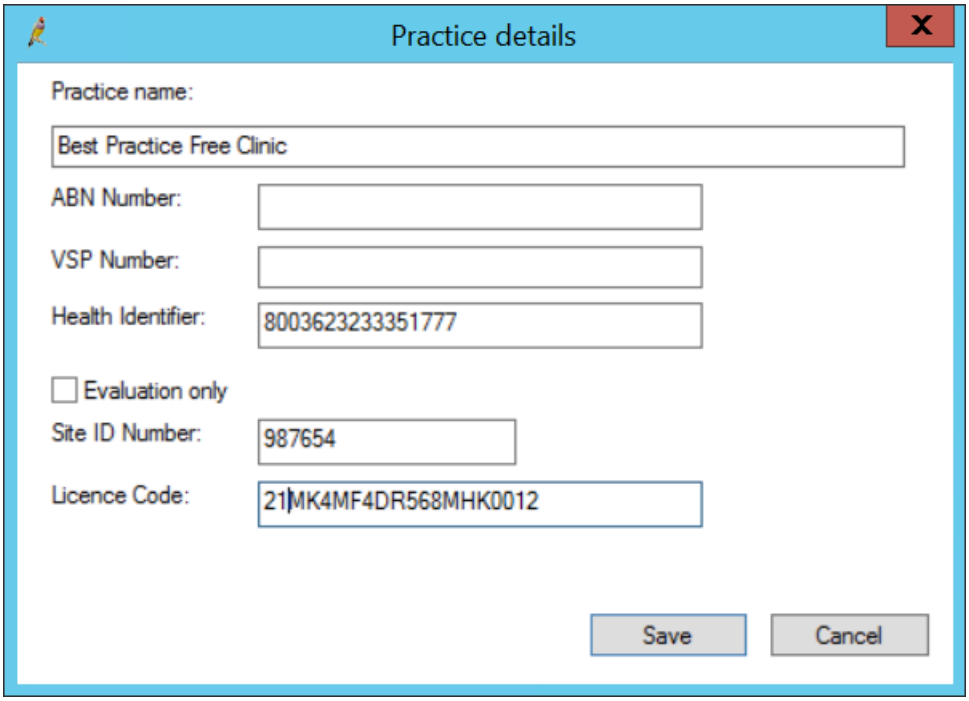
If you are starting from an empty database, you are prompted to enter the practice details when you first log in to Bp Premier.

> ***Note:*** *Ensure your practice details are correct. Bp Premier uses the practice information entered when printing items like scripts, invoices, and receipts.*

There is only ever one practice **name** in the software. However, you can create multiple practice **locations** to be printed on scripts, invoices, and reports. Users select a location when the user logs in to the software.

To add practice details:

1. Select **Setup** > **Practice** from the Bp Premier screen. The **Practice details** screen will appear, showing:
   - practice name
   - a summary of how many licenced users you have
   - the licence expiry date
   - each practice locations that are set up
   - contact details for the first location on file.
2. Click **Change**. The **Practice details** update screen will appear.

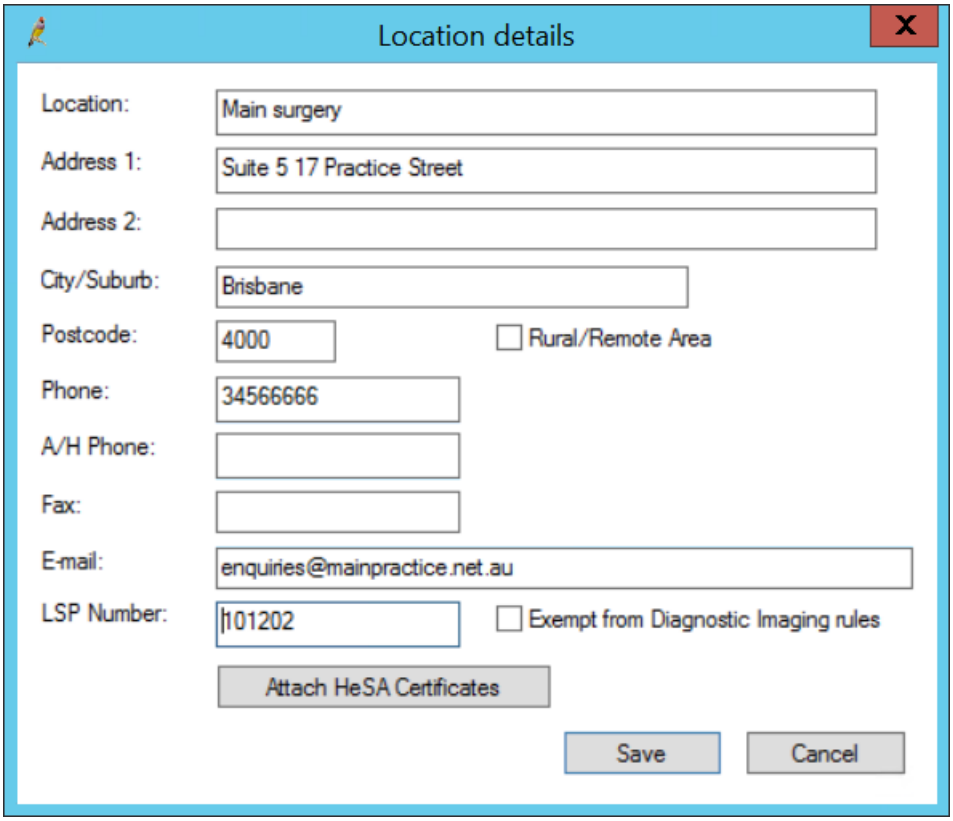


3. Update any details and click **Save**.

There must be at least one location record. Most practices will have only the one practice location. However, you can create multiple practice locations. Location details are printed on scripts, invoices, and reports.

To add a location:

1. Select **Setup** > **Practice** from the Bp Premier screen. The **Practice details** screen will appear.
2. Click **Add** next to the **Practice Locations** list field. The **Location details** screen appears.



3. Complete the details for this location and click **Save**.

   The **Rural / Remote area** checkbox controls which Medicare incentive is added to bulk-billed invoices for pensioners, health care card recipients, and children. If unticked, incentive '10990' is used; if ticked, '10991' is used.

   LSP Number is the Location Specific Practice Number used when practices provide diagnostic imaging services or radiation oncology services.

   The **Exempt from Diagnostic Imaging rules** checkbox is used in remote areas where Diagnostic Imaging Services are provided and the practice is exempt from the claiming rules.

To delete a location:

1. Select the location on the **Practice details** screen and click **Delete**. A prompt will appear if any users have provider numbers linked to that location.
2. If the location is deleted, users with linked provider numbers will still be visible, but the provider number linked to that location will no longer be visible.

To restore a deleted location:

1. Select the **Show Deleted** checkbox at the bottom of the screen to view deleted locations.
2. Select the deleted location in the **Practice locations** list field and click **Restore**.

SET UP THE SYSTEM FOR USE

Link to a third party billing package

If you are using a third party billing package, you will need to configure the link options with Bp Premier. If your practice also uses Bp Premier's billing module, you do not need to perform this step.

Open Bp Premier on the server and configure the link options to your billing package:

- Linking Bp Premier to Pracsoft
- Linking to E-Claims
- Linking to a third party billing package.

Information on linking to billing packages can be found in the Bp Premier K**nowledge Base**.

Test the linking is working between the two applications:

1. Add a new patient in the billing package and ensure that the patient transfers into Bp Premier. This will take up to one minute to transfer.
2. Change an existing patient demographic in the billing package (make a minor change, such as from 'St' to 'Street') and ensure the demographic is updated in Bp Premier. This will take up to one minute to transfer.

Set up results and secure messaging import

1. Set up **Results Import options** for importing pathology and radiology results as described in **Setting up results importing on page 16**.
2. Configure Pathology and Radiology forms as described in **Setting up radiology forms on page 13** and **Setting up pathology request forms on page 10**.
3. Set up **Messaging Providers** for secure messaging and electronic referrals (if required at your practice).
4. Run the BpLink program under **Start** >**Program files** > **Best Practice Software** > **Best Practice** > **BPLink**.

   BpLink must run continuously on the Bp Premier server. The BpLink program checks periodically for results and patient demographic changes waiting to be processed, and also runs any configured scheduled backups. When run the first time, a bird icon will appear in the system tray. See **Configuring Bp Link** in the Bp Premier Knowledge Base for more information.

Note: *Terminal Server sessions will not run or display the BPLink.exe file. You must run BpLink from the Bp Premier server to enable automatic linking to billing, pathology import, and Bp Premier scheduled backups to occur.*

Review User settings

1. Check user permissions for all users to ensure they have appropriate access.
2. Give one trusted user full permissions and store the password for this user in a fireproof safe for emergency access.

3. Log each user into their workstation to:
   - Configure their preferences — **Setup** > **Preferences**
   - Configure their printers — **Setup** > **Configuration** > **Printers**
   - Update their password — **Setup** > **Users**.

Update standard lists

Bp Premier provides a a number of standard lists that can be modified to suit your practice.

1. Go to **Setup** > **Configuration** > **Lists**.
2. Add and modify list items for the following lists:
   - Reason for ceasing medication
   - Contact category
   - Document type
   - Appointment type
   - Reason for cancelled appointment
3. If you have duplicate items in your list (common items with slightly different spelling, for example) use the **Clean up** button to merge duplicate items.
4. From the **Configuration** screen, select the **Reminders** tab.
5. Best Practice Software recommends that the checkbox **Allow free text reminders** be **unticked**. Disallowing this option forces providers to select a reminder reason from the preconfigured list.
6. Add any reminder reasons applicable to your practice.
7. Select the **Care Plans** tab. Add any **Care plan goals** and **Care plan tasks** applicable to your practice.
8. Click **Save** to save your configuration changes.

Configure Bp Premier Email (optional)

If the practice intends to use the inbuilt email functionality, configure these settings via the **Setup** > **Configuration** > **Email** screen.

Bp Premier email allows you to compose email messages from the internal word processor, and send and receive emails from individual user email addresses and a practice-wide email address.

Configure Bp Premier Messages

If the practice intend to use the inbuilt message functionality, add message groups and message users by selecting **Setup** > **Configuration** > **Messages**.

Bp Premier messages allow internal messages to be sent and received between Bp Premier users. Messages are unrelated to the **secure messaging** services used for electronic referrals.

Enter patient demographics

If the practice did not convert from another clinical package, you will need to input your patient demographic information by selecting **File** > **Open Patient** > **Add new**.

Add Contacts

Contacts are individuals, companies, or institutions of relevance to the practice. Contact details are stored in the database.

If the practice converted from another clinical package, the contact list will be populated with the data from the other system. If the practice did not convert from another package, you will need to add third party contacts by selecting **View** > **Contacts** > **Add New**.

Configure Bulk Document Import

Bp Premier provides a Bulk Document Import utility for bulk scanning or importing documents. Configure this utility for each user who will be importing documents. See **Importing clinical documents in bulk** in the Bp Premier Knowledge Base for more information.

Setting up pathology request forms

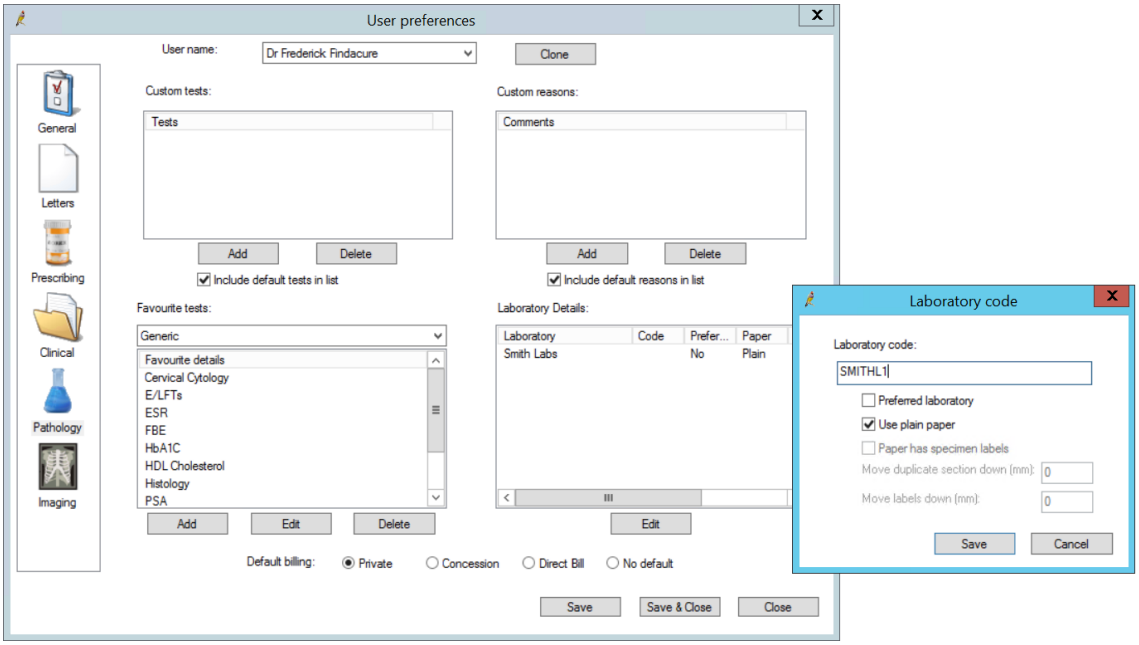
By default, Bp Premier uses a standard format for pathology forms and very little needs to be changed in order for them to print. However, because some laboratories use pre-printed stationery and others do not, before you can print pathology forms, you must:

1. Add the pathology provider as a contact.
2. Create a request layout for the pathology provider.

You can set the default preferred pathology provider for a doctor. When a doctor creates a pathology request from the patient record, the preferred laboratory will be preselected.

CREATE A PATHOLOGY REQUEST LAYOUT

1. Select **Setup** > **Preferences** > **Pathology** from the main Bp Premier screen. The **User preferences** screen will be displayed for pathology.
2. In the **Laboratory Details** section at the bottom right, select the laboratory that you want to set up the layout for and click **Edit**. This will display the **Laboratory code** screen.



3. Complete the fields in this screen:

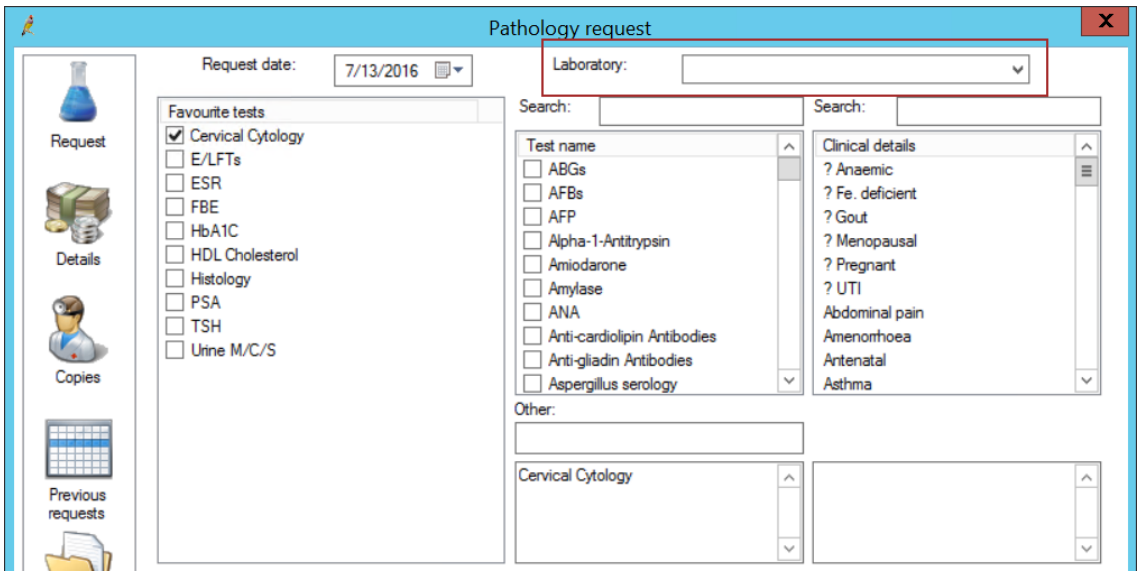
Field	Description
Laboratory code	Enter a code if the laboratory requires a code printed on the request.
Preferred laboratory	Tick this box if this laboratory is the user's preferred laboratory. When the user creates a pathology request from the patient record, the request will default to this pathology lab.
Use plain paper	Tick this box if the laboratory does not provide pre-printed stationery.

Field	Description
Paper has specimen labels	Tick this box if the pre-printed stationery has a section for specimen labels. When this box is ticked, the **Move duplicate section down** and **Move labels down** fields become available. Enter a measurement in mm to adjust the position from the top left that the duplicate and label sections are printed.

4. Click **Save**. Pathology requests can now be printed for this laboratory.

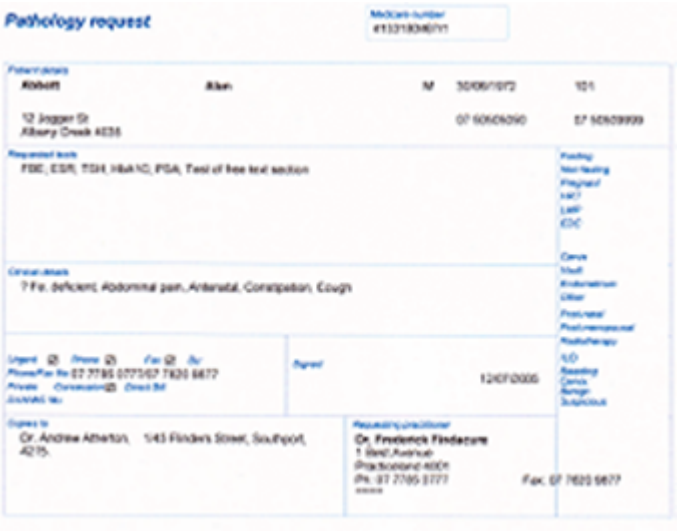
PRINTING A PATHOLOGY FORM

When printing a request from the patient's record, the **Pathology request** screen appears.



Plain Paper Form

If there is no laboratory selected from the **Laboratory** drop-down list, the request will print on plain paper.



Pre-printed Form

If there is a laboratory selected from the **Laboratory** drop down list, the request will print so that you can use pre-printed paper according to the lab's layout settings.

Setting up radiology forms

Unlike pathology forms, there is no standard radiology request form.

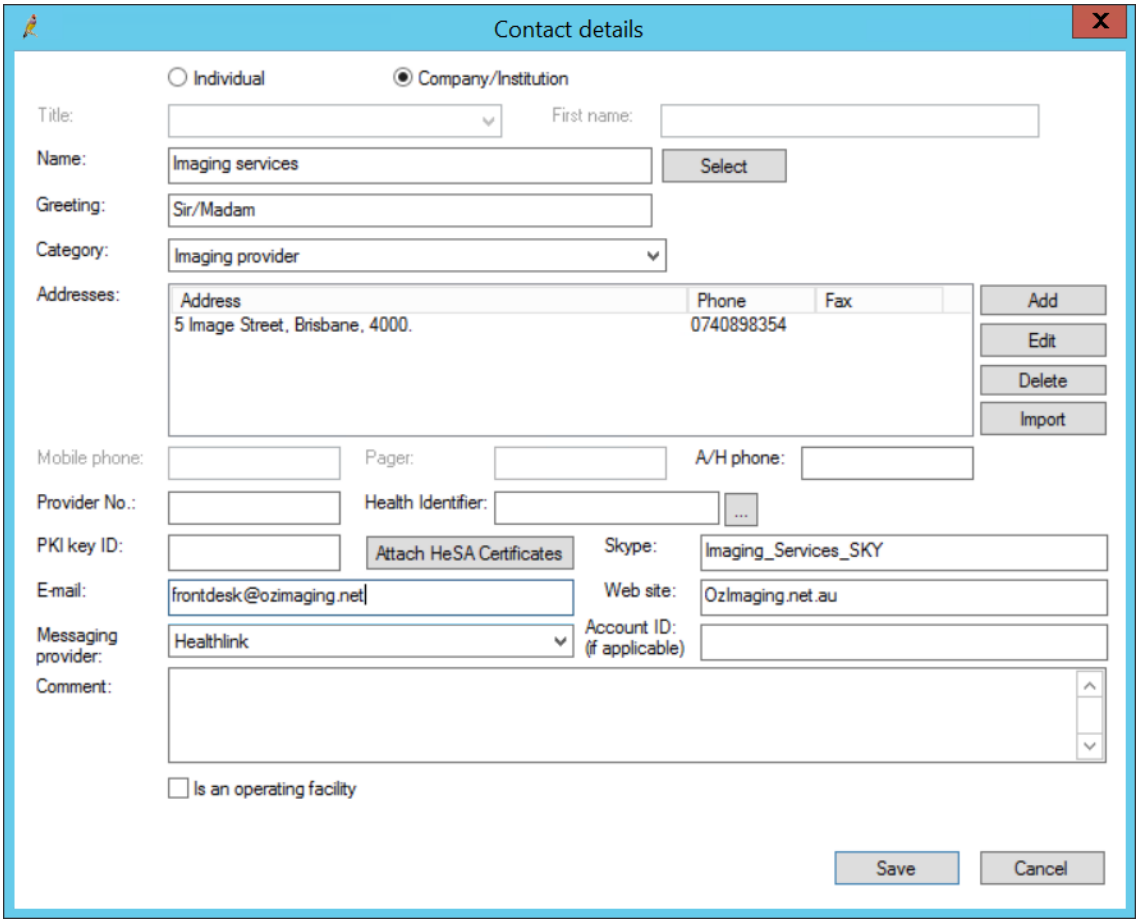
For each radiology provider used by your practice, you must:

1. Add the radiology provider as a contact
2. Create a radiology request layout for the provider.

You can set the default preferred radiology provider for a doctor. When a doctor creates a radiology request from the patient record, the provider and request layout will default to the **Preferred Imaging Provider** set in the provider's preferences.

CREATE A RADIOLOGY PROVIDER CONTACT

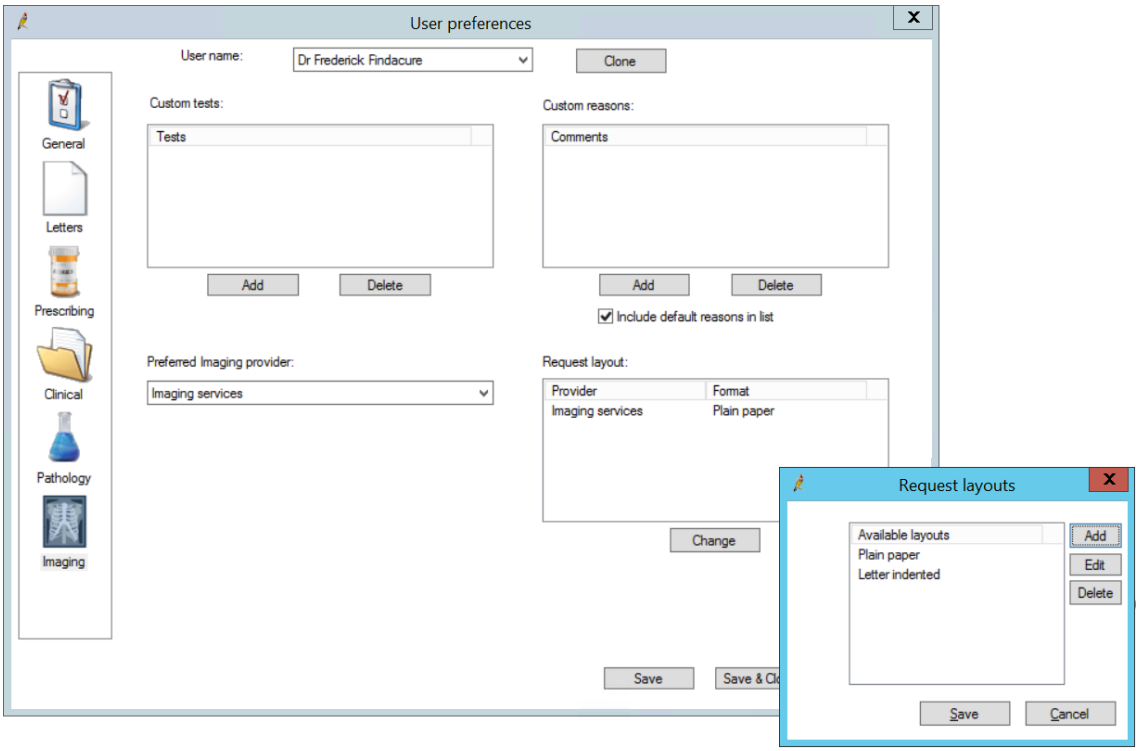
1. Select **View** > **Contacts** from the main Bp Premier screen.
2. Click **Add new** and the **Contact details** screen will be displayed.



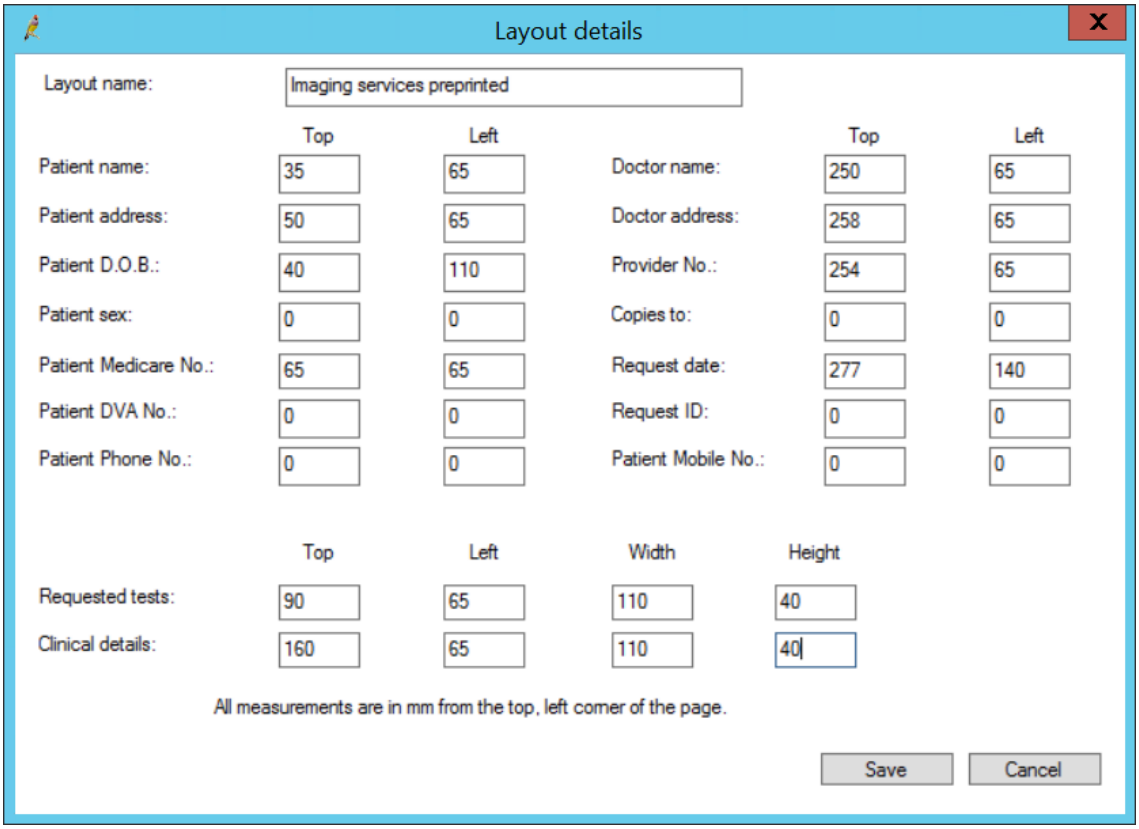
3. Select **Company/Institution** at the top.
4. Select a **Category** of 'Imaging Provider'.
5. Complete the remaining details for the radiology provider. If the provider can accept referrals in the CDA format, tick **Accepts CDA referrals** when adding an address.
6. Click **Save**.

CREATE A RADIOLOGY REQUEST LAYOUT

1. Select **Setup** > **Preferences** > **Imaging** from the main Bp Premier screen.
2. Select the radiology provider that you wish to set up the layout for and click **Change** to display the **Request layouts** screen.



3. Any radiology layouts will appear as well as the default 'Plain paper' layout.
4. If the lab requires you to use preprinted stationery and it is not already listed, you will need to create a layout that suits their stationery. Click **Add**. The **Layout details** screen will appear.



5. Enter the measurements in mm from the top left corner of the page for each element. Click **Save**.
6. The new layout name will now appear in the **Request layouts** screen. Select the new layout name and press **Save** to update the radiology provider to use this layout.
7. Check that the **Radiology provider** now shows the new layout name under the **Format** column.
8. You can assign the new layout to any other radiology providers you create.
9. In the **Preferred Imaging Provider** drop-down list, select the default radiology provider for the logged-in user. The imaging provider selected here will be automatically selected when the user creates a radiology referral from the patient record.
10. Click **Save & Close** to close the **User preferences** screen.

Setting up results importing

Bp Premier is able to import pathology and radiology results and electronic documents received through third party messaging providers. The practice may use more than one third party provider for this purpose.

Before you can set up Bp Premier to import results, you need to:

1. configure Bp Link on the Bp Premier server. See **Configuring Bp Link** in the Bp Premier Knowledge Base for more information.
2. configure the third party software to download results and reports regularly. You will need to consult your messaging software's documentation.

Results are imported to a folder on the Bp Premier server, or another machine in the network you nominate. Best Practice Software recommends that you set up a separate folder on the server for these files to be downloaded to (for example, 'c:\Results'). While not necessary, we also recommend that you have a separate subfolder for each pathology and radiology provider your practice receives results from. Separate folders can make it easier to diagnose download problems .

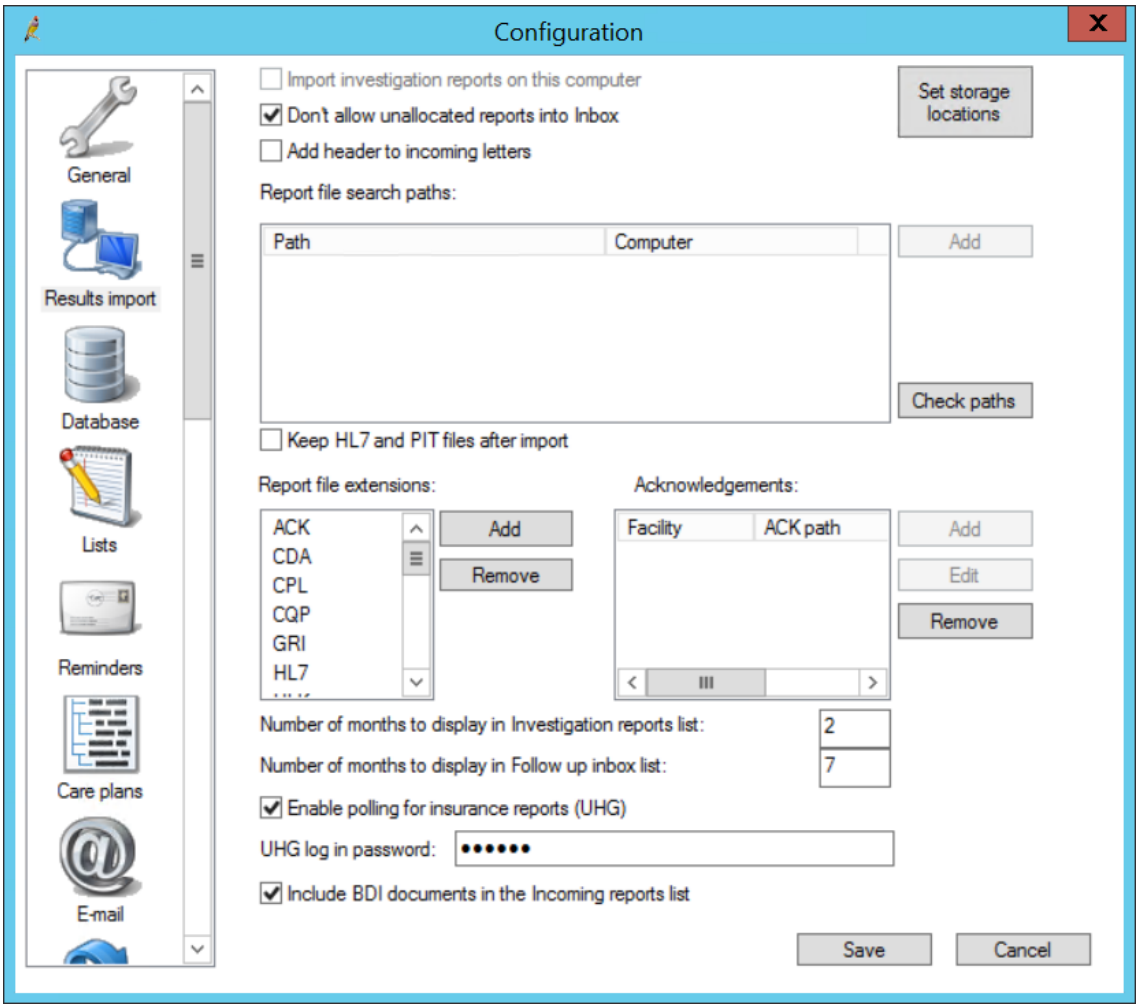
However, some messaging providers require specific paths, and we recommend that you liaise with the messaging provider' support to assist you with the settings required.

Perform the following procedure on the server or workstation you will use to receive incoming results.

SETTING UP RESULTS IMPORTING

Enable results import

1. Select **Setup** > **Configuration** from the main Bp Premier screen and select the **Results Import** tab.



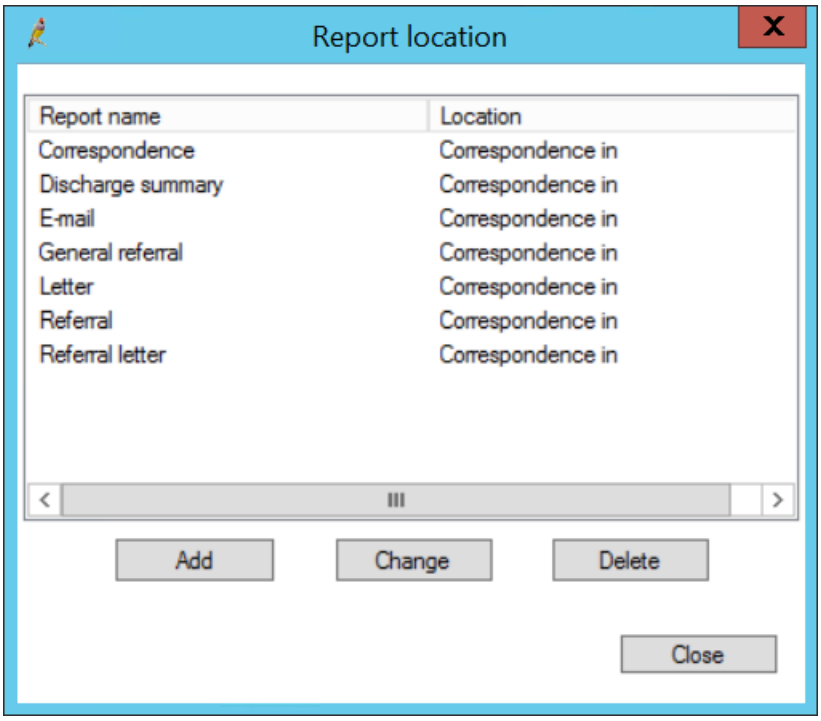
2. Set the following fields:

Field	Description
Import investigation reports on this computer	Tick this checkbox. This would usually be the Bp Premier server only. ***Note:*** *Don't set up two computers to import results. Results import may conflict between the two machines.*

Field	Description
Don't allow unallocated reports into Inbox	Tick if you do not want to forward results that have not been allocated to a patient to a provider's inbox. If ticked, someone in the practice should be allocated the task of checking for unallocated results on a daily basis from the **View** > **Incoming reports** screen.
Add header to incoming letters	Referrals and other letters received electronically usually have a patient's name and address and the top and don't need to show the header visible on results. Tick if you want to see the results header as well as the address shown on the letter.

Set default storage locations

3. Click the **Set storage locations** button. The **Report Location** screen will be displayed.



4. By default, each result type stores in **Correspondence In**. You can change the store location to **Investigations**.
5. If you need to add a new report location for your practice (for example, a unique type of referral), click **Add** from the **Report Location** screen. Type the **Report name** and select a default store location from the **Store in** field. Click **Save** to return to the **Report location** screen.

   The **Report name** will be matched against the content of the report and identified accordingly. When processing reports from the provider Inbox, the Inbox indicates where the report will be saved in the patient's file: Correspondence In or Investigations.

6. Click **Close** to return to the **Configuration** screen.

Add download paths

7. Click **Add** next to the Report file search paths. A file explorer will open.
8. Browse to and select the folder to download the report. Click **Ok**.
9. Repeat steps 7–8 for each path where results are being downloaded to.
10. Complete the rest of the fields in the **Results Import** tab:

Field	Description
Keep HL7 and PIT files after import	Only tick this box if advised to do so by General Products Support to diagnose an issue with importing reports.
Report file extensions	Most labs will use the standard extension for their results file. However, additional file extensions can be added here if required for a lab.
Acknowledgements	Some labs require that an acknowledgement is sent back to the lab to confirm that the result has been received. Refer to **Setting up results acknowledgement on page 21**.
Number of months to display in Investigation reports list	Defaults to 1 month, but you can extend the default month range.
Number of months to display in Inbox follow up list	Defaults to 12 months, but you can extend the default month range.
Enable polling for insurance reports (UHG)	medEbridge is a UHG proprietary system that communicates between Bp Premier and UHG to electronically complete insurance reports. Tick this checkbox to enable UHG functionality and enter the login password. See **Using medEbridge** in the Bp Premier Knowledge Base for more information.
Include BDI documents in the Incoming reports list	Tick this checkbox to view documents that are scanned or imported via the Bulk Document Import utility (BDI) in the **Incoming reports** screen.

11. Click **Save** to save your results import configuration.

HOW RESULTS ARE IMPORTED

There are two ways of importing results into Bp Premier:

1. Run the utility called **BPLink** on the server. This utility will check every five minutes to see if there are any results and reports in any of the folders indicated in the **Report file search paths** and if found will import them into Bp Premier.

   Using Bp Link is the **preferred method**, because Bp Link does not require any user intervention. See **Configuring Bp Link** in the Bp Premier Knowledge Base for more information.

2. Select **View** > **Incoming Reports** from the main Bp Premier screen. This will force an import of any results and reports found in any of the folders indicated in the **Report file search paths**.

Matching patients and users to results

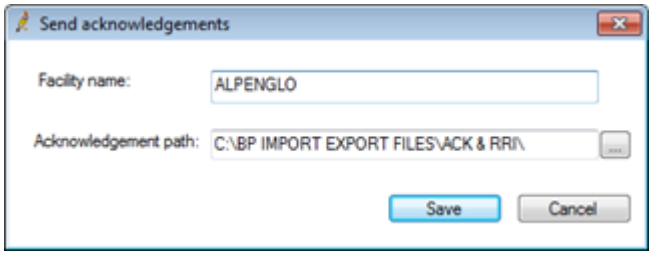
- If the system can match the result to a patient and a doctor the results will appear automatically in the Doctor's Inbox. Refer to the help screen on the 'Inbox' function for further details on using this function.
- If results cannot be matched to a patient and/or doctor they will remain in the **View** > **Incoming** screen and will need to be matched manually. Refer to the help screen on Incoming Reports for further details.

Setting up results acknowledgement

Many secure messaging providers provide a tracking mechanism to confirm that a result, report, or document has been received by the intended recipient. This tracking mechanism uses an acknowledgement request.

Enabling acknowledgement of results receipt

1. Select **Setup** > **Configuration** > **Results import** from the main Bp Premier screen.
2. Next to the **Acknowledgements** list, click **Add**. The **Send acknowledgements** screen will appear.



3. Enter the **Facility name**. This needs to be exactly the name stored in the file by the sending facility.
4. Enter the **Acknowledgement path**. This is the folder in which the acknowledgement files will be saved and from which the lab or sending facility can collect the acknowledgements.
5. Click **Save** to update this setting in the system.
6. Click **Cancel** to cancel any changes and return to the **Results import** screen.

After a HL7 result has been imported intoBp Premier, the system will check if the facility name in the file corresponds with the name listed on the **Sent acknowledgements** screen. If Bp Premier finds a match, an acknowledgement file will be created in the path indicated.

There are two types of acknowledgement files:

- acknowledgements related to results have the file extension '.ACK'
- acknowledgements related to reports and referrals have the file extension '.RRI'.

Setting up a messaging provider

Messaging providers are third party companies that securely transmit results, reports and documents to and from GP practices, specialists, hospitals, pathology and radiology labs. Third party companies provide and install their own application on your practice server; Bp Premier interacts with that software to import or send the document or file.

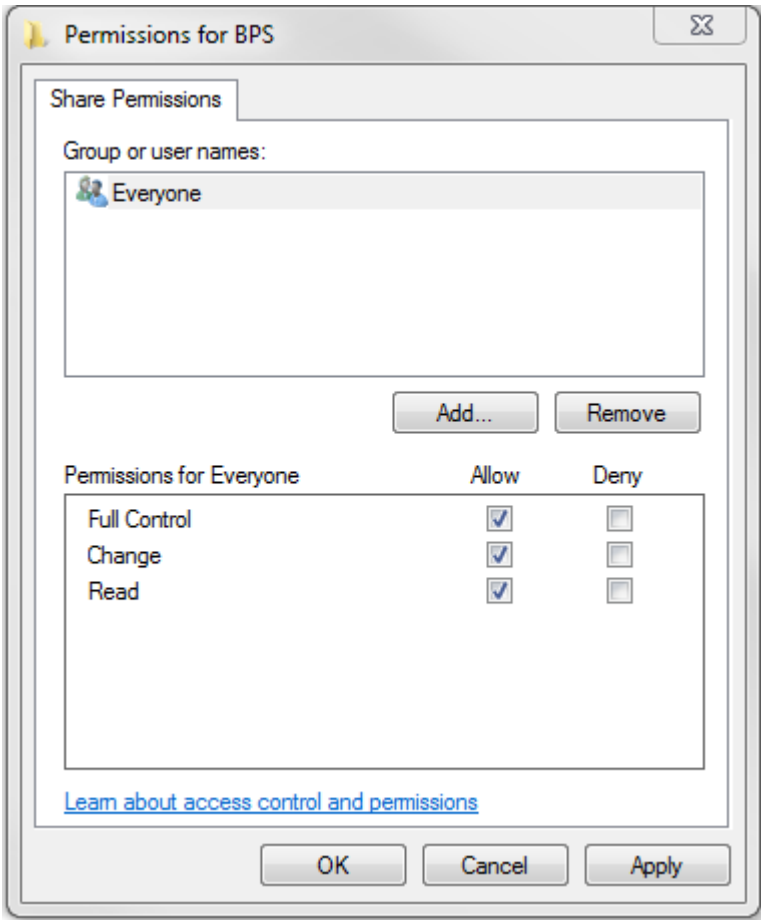
Before you begin, check with each of your messaging providers to identify the folder they download documents to (Incoming) and retrieve documents from (Outgoing). Write the folder locations down; you will need to select the folders when setting up messaging.

Follow the procedures below on the Bp Premier server for each messaging provider that you will be using.

SHARE THE OUTGOING MESSAGE FOLDER

Share the folder and set the permissions on the outgoing message folder, so that all users on your network can create documents. Contact your practice's IT support if you are not familiar sharing folder permissions on Windows.

1. Browse to the folder, right-click and select **Properties** > **Sharing**.



2. On XP and Server 2003, click on **Permissions**, select the user group 'Everyone' and set **Full Control** to allowed.

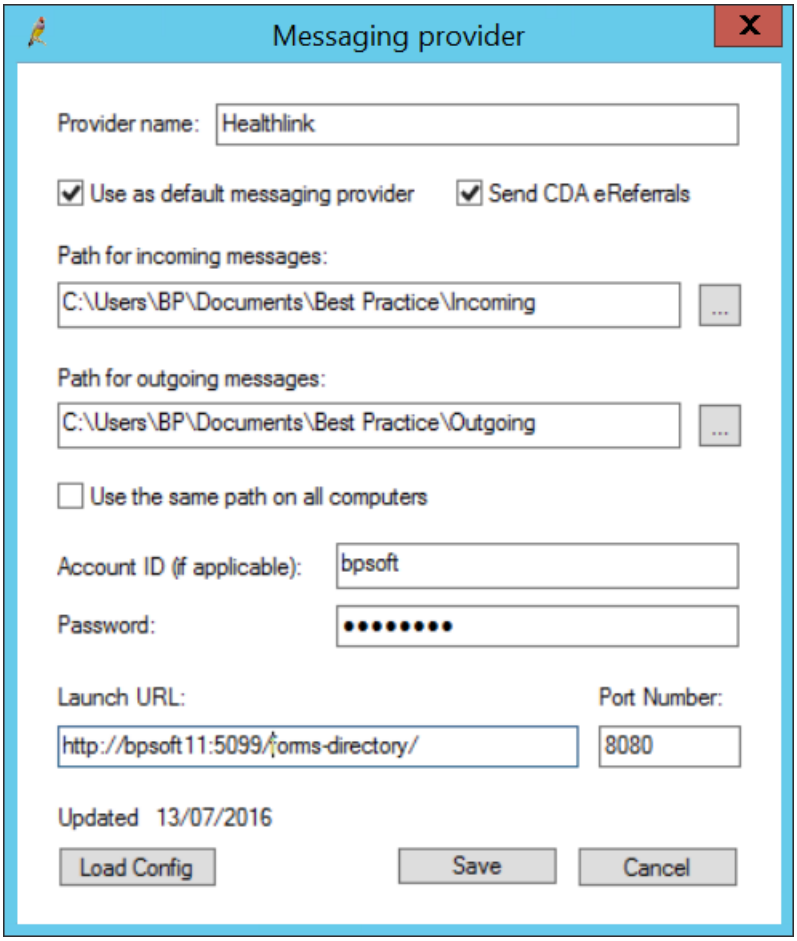
   On Vista or Server 2008 and above, click on **Advanced Sharing**, tick **Share this folder**, click on **Permissions**, select the user group **Everyone** and set **Full Control** to allowed.

3. Click **OK** to close the **Properties** screen.

SET UP YOUR MESSAGING PROVIDER DETAILS

You will need to create a separate record for each messaging provider that you are using. Perform the following steps on the Bp Premier server only.

1. From the main Bp Premier screen, select **Setup** > **Configuration** > **Messaging** tab.
2. Click **Add** and the **Messaging provider** screen will appear.



3. Complete the fields in the screen.

Field	Description
Provider Name	Name of the messaging provider

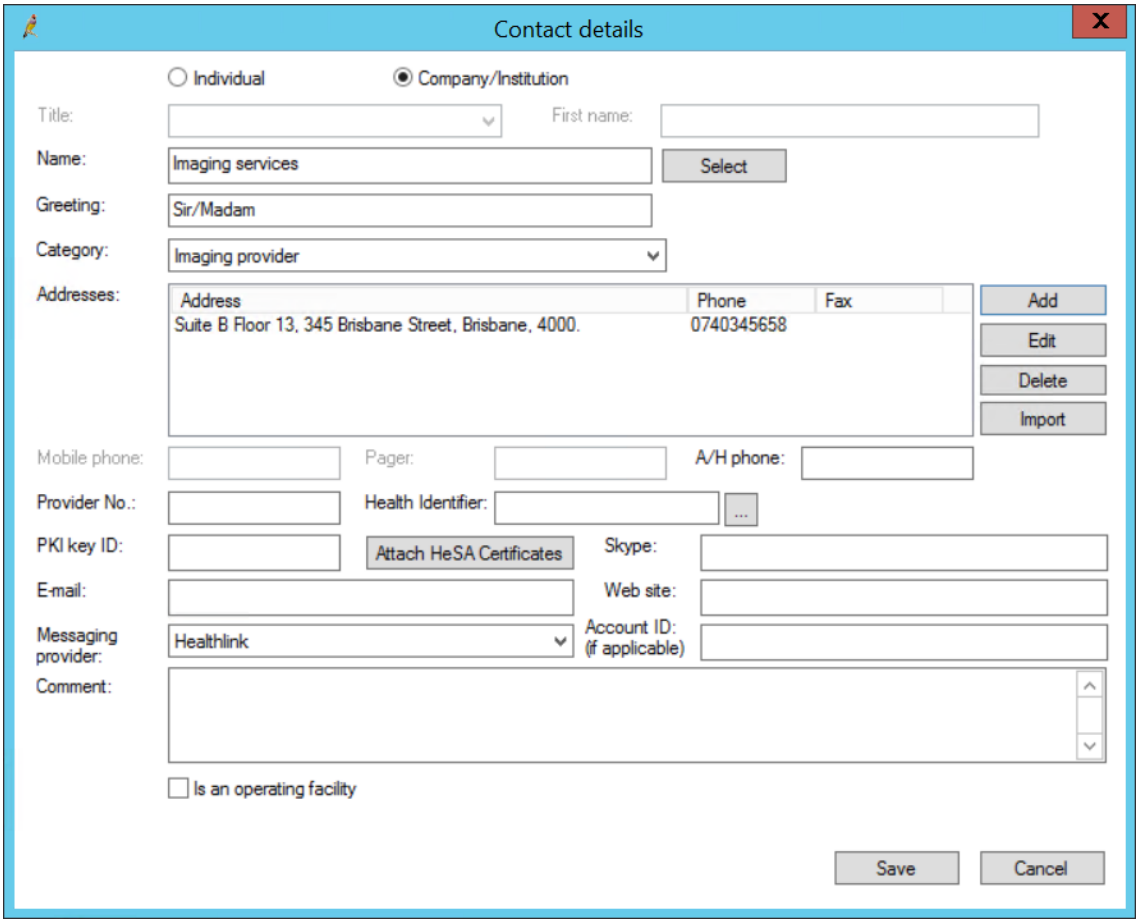
Field	Description
Path for incoming messages	Location for the incoming messages. This can be either the local path or the UNC path.
Path for outgoing messages	Location for the outgoing messages. The outgoing path must be different to the incoming messages path. ***Note:*** *The path for outgoing messages must be the UNC path for the folder, so that users on workstations can access this folder across the network. An example of a UNC path is '\\server\messagingprovider\out'.*
Use the same path for all computers	Tick this field so that this setting applies to all users.
Account ID	Account ID for this messaging provider (if applicable).
Send CDA eReferrals	Tick if your messaging provider has the functionality to transmit CDA format eReferrals. The messaging provider's user documentation or support will be able to tell you if CDA is supported.
Use as default messaging provider	Tick if this is your primary messaging provider. The messaging provider will be used if the contact you are sending a document to cannot accept eReferrals or does not have a preferred messaging provider.

4. Click **Save** to save the messaging provider. You can now select this provider when creating a pathology lab or imaging provider contact.

CONFIGURING CONTACTS

You need to configure each contact your practice will be sending messages to.

1. Select **View** > **Contacts** from the main Bp Premier screen. Select the contact and click **Edit** to display the **Contact details** screen.



2. In the **Messaging provider** drop-down list, select the contact's preferred messaging provider.
3. Enter the contact's **Account ID** for that messaging provider and the contact's **Email address**.
4. If you know that this messaging provider's software can receive eReferrals in CDA format, select the contact's address and click **Edit**, or **Add** to add an address. Tick the box **Accepts CDA eReferrals** and click **Save** to update the record.
5. Click **Save**.