

# Bp Premier Clinical Software Conversion Guide

## Legal notices

Copyright © 2017 Best Practice Software. All rights reserved.

Best Practice Software believe the information in this User Manual is accurate as of its publication date. The information is subject to change without notice.

You may only copy, change, or use the User Manual as required for your own use as permitted under the End User Licence Agreement or the Order Form. User Manuals are intended for reference only and do not preclude the need for training.

Best Practice Software Pty Ltd	Best Practice Software New Zealand Ltd
PO Box 1911	PO Box 1459
Bundaberg Queensland Australia	Hamilton New Zealand 3240
4670	
<a href="http://www.bpssoftware.net">www.bpssoftware.net</a>	

The information contained in the User Manual is intended to be a guide only. BPS does not provide any warranty in relation to its currency, accuracy or completeness and, unless otherwise required by law, will not accept any liability in relation to any loss or damage suffered by you or any third party in reliance on the information contained in the User Manual.

Last updated: June 2017

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

## Conversion Checklist

Converting your data from one software package to another can be a daunting process. To facilitate a smooth transition to Bp Premier, the practice should prepare for both the Trial and Live conversions.

The Conversion Checklist below provides a summary of the steps involved when performing a trial and then live conversion. Read this checklist in conjunction with the detailed instructions for your clinical package to gain an overview of the conversion process.



**Important:** To mitigate issues, Best Practice Software insists that all sites perform a trial conversion **at least 2 weeks prior** to the expected Go Live date.

### How to get assistance

Best Practice Software provide a conversion utility free of charge to enable you to convert your data to Bp Premier. The conversion process would be performed by your own staff or your IT technician. General Products Support will provide as much assistance as possible via phone on 1300 401 111 or email [support@bpsoftware.net](mailto:support@bpsoftware.net).

The Best Practice Forum on our website [www.bpsoftware.net](http://www.bpsoftware.net) is an invaluable source of information, advice, views, ideas, questions and answers from hundreds of Bp users across Australia. Click on **Register** in the menu at the top to join.

### Obtain a quote

Contact our relationship support team on 1300 401 111 for a quote to install Bp Premier. You can obtain a free trial licence to evaluate the software before purchase.

Go to <http://www.bpsoftware.net/learning/> to see the training options available for Bp Premier.

### Trial conversion

To run a trial conversion, you will need a spare computer as a 'test' server. You cannot use your practice's live database for a trial conversion.

Carry out the following steps at least two weeks prior to a full, live conversion.

1. Confirm your server PC and network meet the hardware, hard disk space and operating system requirements.
2. Download the latest version of Bp Premier. Contact Best Practice Software support to obtain a free trial licence.
3. Contact Best Practice support to ensure you have the latest version of the conversion utility for the software package you are migrating from.
4. Ensure the pre-converted data in the original package database is in good condition.
5. Back up the original database.
6. Install the original package software on a test computer and restore the backup you just made to this installation.
7. Install an evaluation version of Bp Premier on a test computer as a **Server** installation. This computer can be the same machine as in step 6.

8. Run the conversion utility on the test machine and follow the prompts.
9. Check data in the test Bp Premier database thoroughly to ensure that all data converted correctly.



**Important:** Best Practice Software recommends that the principal doctors perform a thorough check of as many patient records as possible to ensure that all data is present and accessible. We suggest opening a range of patients in your current application (long term, medium term, and new patients) and comparing the data with this same patient in Bp Premier. We also recommend checking the last patient seen before the conversion to ensure that the most recent data has been converted.

10. Complete, sign, and fax or email the form *BP\_FAQ-Trial Conversion completion form* to General Products Support on +61 7 4153 2093. Email the file *BPSCConversion.log* to support@bpsoftware.net. This file can be found in the folder you installed the conversion utility in.
11. Best Practice Software Support will contact you with your 30 day activation licence key.

## Live conversion

Carry out the following steps if you have successfully performed a trial conversion with no issues, and have confirmed the most recent data has been converted.

1. Ensure you have your invoice and 30 day activation licence key. If you have not received your licence key after submitting your Trial Conversion completion form, contact Best Practice Software support.
2. Install Bp Premier as a **server** installation on the machine designated as your **live** Bp Premier server.
3. Upgrade Bp Premier with all recent program updates from [www.bpsoftware.net](http://www.bpsoftware.net).
4. Compare the drug database date in Bp Premier with the most recent drug database update from [www.bpsoftware.net](http://www.bpsoftware.net). If your installation does not have the most recent drug database, download and install an incremental or comprehensive update.
5. On conversion day, perform a complete backup of the old software live server (database and system) including any components specific to your original software package, such as MD3 ManageEzy documents.
6. Install the conversion utility on the live server from step 5. Run the conversion utility to the live Bp Premier server.
7. Enter the 30 day activation key when prompted.

While conversion is taking place:

1. Install Bp Premier as a **client** installation on all workstations
2. Open Bp Premier on each workstation and connect to the Bp Premier server you installed in Live Conversion step 2.

When conversion is complete:

1. Check ALL data carefully to ensure that conversion has been successful. Access the last patient updated in the old system prior to the conversion to ensure the visit record is present.
2. Set up practice details and ensure that the licence key is for the correct number of users.

3. Review user permissions and reset user passwords. Ensure one trusted user has full permissions, and that the password for this user is secured in a fireproof safe for emergency access.
4. Disable all shortcuts to the old software to ensure staff can't accidentally use the wrong system.
5. Have each user log into their Bp Premier workstation and configure their printer settings and preferences.
6. Undertake training for staff new to Bp Premier.

## Converting from a program with no conversion utility

There are a number of third party clinical packages which require a manual conversion to transfer patient details to Bp Premier. Clinical packages include the following:

- Monet
- Surgiware
- RXMedical
- CSS
- ZedMed
- CompuDoc.

Best Practice Software recommends carrying out a trial conversion from your old software at least two weeks prior to your proposed Go Live data.

Follow the instructions to convert data from another practice management software. Read the checklist summary in [Conversion Checklist on page 3](#) before following the instructions.

## OBTAIN UPDATE-TO-DATE VERSION OF BP PREMIER

Please check with General Products Support via phone on 1300 401 111 or email support@bpsoftware.net. The latest version at present is Bp Premier - Lava edition but it is recommended to confirm the version before proceeding.

***Note:** If an (old) previous installation of Best Practice is present on the server you should either upgrade to this latest version or uninstall completely and reinstall if the version is too old to upgrade.*

## CONFIRM THE HARDWARE REQUIREMENTS

Ensure all machines that will be required to run Bp Premier meet the hardware system requirements. See [System Requirements for Bp Premier Lava](#) in the Bp Premier Knowledge Base for more information.

## CONFIRM HARD DISK SPACE REQUIREMENTS

By default, Bp Premier program files and databases are installed to the C:\ drive. It is recommended that prior to GO LIVE that an estimate of the disk space requirements is made to ensure that there is sufficient space on the server on the C:\ drive to cater for:

- Size of the Bp Premier databases (following the import of your clinical data)
- Sufficient room for expansion of the databases due to normal operation.

If **compressed** backups are to be performed, there will need to be free space approximately twice the size of the Bp Premier databases to allow for temporary files to be created during the backup process (for example, 6 GB of databases will need approximately 18GB free space to perform compressed backups)

To check the size of the databases following the data import, check the size of the databases stored in the folders (these are the default locations – you may have installed your data to another folder during installation):

- **SQL Express 2005 Installations** - C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data
- **SQL Express 2008 Installations** - C:\Program Files\Microsoft SQL Server\MSSQL10.BPSINSTANCE\MSSQL\DATA
- **SQL Express 2008R2 Installations** - C:\Program Files\Microsoft SQL Server\MSSQL10\_50.BPSINSTANCE\MSSQL\DATA
- **SQL Express 2012 Installations** - C:\Program Files\Microsoft SQL Server\MSSQL11.BPSINSTANCE\MSSQL\DATA
- **SQL Express 2014 Installations** - C:\Program Files\Microsoft SQL Server\MSSQL12.BPSINSTANCE\MSSQL\DATA



*Tip: The full installation DVD of Bp Premier provides the ability to create your data in an alternate location.*

## CONFIRM SOFTWARE REQUIRED FOR DATA MIGRATION

The procedure required to move your data without a utility requires a software printer. There are several options available for this and commonly available programs include:

- Microsoft Office Document Image Writer or other image viewing software
- Adobe Acrobat PDF writer
- Cute PDF writer, a free PDF Software Printer.

## MOVING YOUR DATA ACROSS

There are two options for transferring your data to Bp Premier:

- Write a database migration script unique to your installation
- Transfer patient demographics to Bp Premier and transfer patient information as needed.

### Option 1 - Write a database transfer utility or script

This option is not a process that Best Practice Software has input in and therefore it is the practice's responsibility to ensure the data that's converted by the 3rd party is accurate and complete. You may need an database administrator or IT technical resource to create a migration script for your installation.

Once these checks are complete, the practice should complete the form BP\_FAQ-Trial Conversion completion form external.pdf and fax to General Products Support on +61 7 4153 2093. Best Practice Software will then issue a 30 day key and invoice.

### Option 2 - Perform a patients.in demographics transfer and transcribe patient information



**Important:** As the processes requires interaction by staff other than Best Practice Software, any data that is lost during this procedure is the responsibility of the practice.

This process is performed in two parts. The first is to generate the list of patients and the second is to import the patient information.

**Note:** Items like prescriptions, outstanding pathology requests, reminders, actions and allergies will need to be entered again.

### Import patient demographics

1. Install Bp Premier as a Server
2. On first opening Bp Premier, new practice details and a new user will need to be created
3. Configure Bp Premier to link to an external billing package. See **Linking to a third party billing package** in the Bp Premier Knowledge Base for more information.
4. In your existing clinical package, ensure that the patients that are active are the patients required for the transfer.
5. From your existing clinical package, perform a bulk demographic export. This should create a file with the demographics of all of the currently active patients. The file must conform to the patients.in format (ASCII v2 or v3). See **Third-party transfer files and DDE reference** in the Bp Premier Knowledge Base for more information.
6. Rename the file created in step 3 to patients.in.
7. Copy this file into the location that Bp Premier is configured to find this file.
8. Bp Premier will import this file and generate a list of patient demographics with empty clinical records
9. At this point you should configure Bp Premier Bp Premier:
  - See **Setting up the Clinical module for the first time** in the Bp Premier Knowledge Base for more information.
  - See **Setting up the Management module for the first time** in the Bp Premier Knowledge Base for more information. (If you'll be using our management module.)
10. Part of this setup should include a new document type, which can be added in **Setup > Configuration > Lists**. Click the **Add** button below the list and enter a new category for health summaries e.g. **Converted Health Summary**.

### Copy clinical data across

1. Ensure the printer settings in your existing package are set to use the software printer mentioned in the Prerequisites section above.
2. For the process of printing a patient health summary or complete patient record from your existing package, consult their documentation and help files. Ensure that when this is being printed to your software printer, that you to save it in an accessible location.
3. Once you have printed the health summary to a PDF or similar file you can now import this into Bp Premier.
4. Open the patient record in Best Practice and click on the Patient Tree item for Correspondence In.
5. Click the **Add** button and navigate to the file created from the software printer and open it.
6. You will be prompted for the document information. Enter details relevant to the file.



This information will now be accessible from the patient's Correspondence In. Each patient's prescriptions, outstanding pathology requests, reminders, actions and allergies will need to be entered again.



**Tip:** *It is worthwhile making a note against a patient record or inactivating them completely in your existing system once a patient has been exported so that you can see whether or not you need to produce an electronic summary for that patient.*



**Tip:** *The appointment book can be a useful tool in staying days or weeks ahead of what's booked by doing the following day or week's patients in advance.*

As the process in this FAQ isn't something that can be easily done for all patients at once, conversion will be a continuing process until all of the patients have been brought across. There will be no log files generated as part of this process. However, Best Practice Software needs to be advised of your expected Go Live date and practice details so that a licence key and invoice can be generated.