

Bp Premier Lava Service Pack 1 Upgrade Guide

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

About this guide

This guide describes how to prepare and upgrade an existing Bp Premier installation to **Bp Premier Lava Edition Service Pack 1** from the following versions:

- Bp Premier Summit 2014 Edition (1.8.4.642)
- Bp Premier Lava Edition (1.8.5.754)

To see which version of Bp Premier you have installed, select **Help > About** from the main screen.

The following sections describe how to upgrade Bp Premier, depending on your current version:

Bp Premier Upgrade Checklist - Lava

Follow the instructions in this section if you are upgrading from Bp Premier Summit 2014 Edition (1.8.4.642).

This upgrade includes the Lava Edition, which contains major changes to the software and several new features, including:

- Support for multiple practice locations
- Support for multiple provider numbers
- New management report module

The *Upgrade Checklist - Lava edition* contains instructions for preparing your staff and practice to accommodate the major changes in the software. It is critical that you familiarise yourself with the new functionality before upgrading, because the changes will affect the workflow at your practice, and staff will need to be made aware of the new reporting module and how it affects the way you pay providers at your practice.

After following the instructions in this section, review the new features available in **Lava Service Pack 1** that are also included in the upgrade.

Bp Premier Upgrade Checklist - Lava SP1

Follow the instructions in this section if you have already upgraded your Bp Premier installation to the Lava edition.

The Lava Service Pack 1 edition contains fewer major changes to the software, but your staff will need to be made aware of changes to the software, including:

- Support for multiple Minor ID numbers
- Setting up online claiming for multiple Minor ID numbers
- Payment reports, transaction reports, and the Reversed Payment report now include details on bounced cheques.

Downloading Bp Premier Lava version from the website

Follow the instructions in this section if you are unable to receive your upgrade DVD by mail. You can download an executable installer from the Best Practice Software website to run locally.

Upgrading to Bp Premier Lava using the Lava edition installation DVD

Follow the instructions in this section if you have received your **Bp Premier Lava Service Pack 1 upgrade DVD** and have completed your preparation according to the *Lava or Lava SP1 Upgrade Checklist*. These instructions assume you are ready to install and provide guidance through the installation process after you have inserted the DVD.

Bp Premier Upgrade Checklist - Lava

The information listed in the tables below should be considered prior to, during, and after upgrading your current version of Best Practice Premier to the Bp Premier Lava edition.

Practice details for upgrade			
Centre Name:		IT Professional Name:	
Staff member managing upgrade:		IT Professional Contact number:	
Upgrade date and time:			

STEP 1: PREPARE THE PRACTICE FOR UPGRADE

✓	Item	Further Information
	Staff Training	Ensure staff have been briefed on up-coming changes. We recommend that everyone is provided with a copy of the What's New in Lava document and that any significant changes are discussed in a staff meeting. Videos and other information will also be available via the Best Practice Software website.
		Sign up for our free Webinar series featuring all that you need to know about Lava. Keep an eye on our website and newsletter for dates and times.
	Reports	Plan your upgrade around an end of financial period event such as end of month or after a disbursement period. This will allow you to cleanly cut-over to the new reporting system.
		<p>Notify your bookkeepers / accountants of the pending changes to the reporting functionality. Major changes have been made to the reporting module and the adjustment features available in the accounting screens.</p> <p>See Using the new reports to pay providers in the Bp Premier Knowledge Base for more information.</p>
	Check the Program upgrade documentation for any prerequisites required before upgrading	<p>Is the prerequisite program version already in use at the practice?</p> <p>Is the prerequisite drug database version already in use at the practice?</p>
	Contact your IT Professional	<p>Discuss the upgrade with your IT Support Professional. Best Practice Software recommend confirming the following topics:</p> <ul style="list-style-type: none"> ■ Ensure the correct 3rd party software or drivers will be available during the upgrade ■ Discuss upgrade timing ■ Discuss disaster recovery and ensure you have a tested rollback plan.

✓	Item	Further Information
	Prepare for changes related to Multi-Location functionality	<p>The Lava release has enhanced support for multi-location functionality. In preparation for this change, centres with multiple locations can start preparing for this change by identifying and configuring a 'primary' account for each provider.</p> <p>Complete the following steps:</p> <ul style="list-style-type: none"> ■ Identify the 'primary' user record for providers with multiple accounts ■ Update all sessions to ensure they have a location set ■ Adjust any aliases in the Incoming Reports screen to ensure reports will now come through to the primary user account ■ Adjust any required preferences for the primary user ■ Adjust any permissions for the primary user ■ Adjust any favourites or auto-fill information for the primary user.
	Back up the database and test your backups	Perform a backup and test that the backup can be restored to a test server to ensure that backups are working as expected.

STEP 2: UPGRADE BP PREMIER

✓	Item	Further Information
	Download the program upgrade utility	Ensure that the program upgrade utility is copied to all workstations. This will assist with eliminating any last minute issues you may have copying files to workstations during the upgrade process.
	Ensure sufficient time is allocated for the upgrade process to occur	Ensure your IT Professional has allocated adequate time for the upgrade to run. Best Practice Software recommend that all upgrades are completed before or after business hours.
	Perform a backup prior to upgrade	Ensure that a successful backup is taken immediately prior to the upgrade occurring and that no users log in again until the server has been upgraded
	Upgrade the server before any workstations	<p>Terminal Server sites - ensure that all users are logged off the server prior to starting upgrade</p> <p>Laptops – ensure that all laptops that have downloaded data are returned to the practice and synchronised with the server data before upgrading the server</p>
	Test the upgrade	Ensure that the upgrade is tested and considered successful before workstation upgrades are started or the centre opens for business.
	Upgrade all workstations	Clients that are not upgraded to the new version will be unable to access the management module.

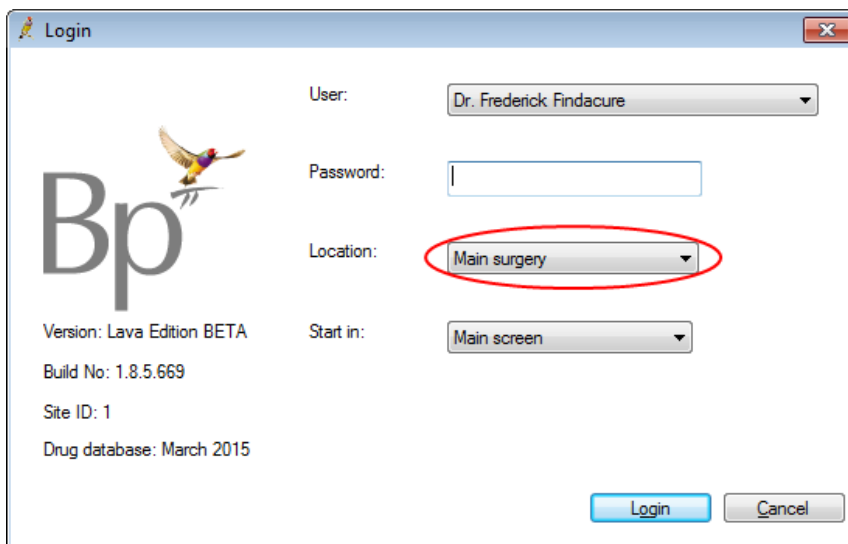
STEP 3: AFTER YOU UPGRADE

✓	Item	Further Information
	Review the What's New in Lava document	Ensure the What's New in Lava document is reviewed again to make sure that you have not missed any important information.
	Review new reports	<p>Identify the reports that will be required for your disbursement and end of month reporting requirements. You may need to update internal documentation referring to your payment and financial processes.</p> <p>See Using the new reports to pay providers in the Bp Premier Knowledge Base for more information.</p>
	Set up provider numbers for each user with multiple accounts	<p>Following the upgrade, centres with multiple locations can now update their provider user records with multiple provider numbers attached.</p> <p><i>Note: This is not mandatory and you may wish to complete this at a later stage.</i></p>
	See Moving to multiple provider numbers in the Bp Premier Knowledge Base for more information.	<p>If consolidating multiple user accounts into one, take into consideration the following items:</p> <ul style="list-style-type: none"> ■ Ensure that bank accounts and payer allocations are set correctly following the change. ■ Ensure all duplicate inboxes are emptied. Reports can be moved from the duplicate account into the primary account one by one if required. ■ Ensure all clinical actions have been actioned or migrated to the primary account. ■ Finalise billing of outstanding accounts.
	Enable access to Healthshare Fact Sheets	Healthshare Fact Sheets are now available within Bp Premier. To enable access to these sheets, tick Enable HealthShare Factsheets in the General section of a user's preferences.

Workflow changes from multiple practice locations

The following describes the changes to Bp Premier workflows and the user interface that regular users will need to be aware of after you have upgraded to Bp Premier Lava.

LOG IN (ALL USERS)



- Users who have multiple provider numbers and used to have multiple user names will no longer see their name listed multiple times on the login screen.
- It is VERY important that ALL USERS select the correct **Location** when logging in as these details are reflected on invoices, reports, scripts, etc.
- Users with provider numbers will only see the locations which they have provider numbers for
- Users without provider numbers will see all locations listed.

The user name at the bottom left of the main **Bp Premier** screen will show the user's name and currently logged in location.

GENERAL CHANGES

Many screens which previously had a **provider** drop down filter will now have either:

- combined **provider / location** drop down filter or
- individual **provider** drop down and **location** drop down filter or
- single **provider** drop down which shows **provider name (location)**

Therefore when users are using these filters they may need to take this into account so that they see the correct list of records.

APPOINTMENT BOOK - SESSIONS

Sessions have been able to be associated with a location for a while but this field was not reflected on

the appointment book. This field is now mandatory when creating sessions. During the program upgrade, any sessions that did not have a location will have one assigned to it - this will be the default location for the relevant provider. It is recommended that these sessions be checked to ensure that they are set to the correct location.

To edit a session, select **Setup > Sessions** from the main Bp Premier screen. Select the user from the drop down listed, highlight the first session and click **Edit**. Set the location for this sessions using the **Location drop down** and press the **Save** button to update the session. Repeat this process with all user sessions.

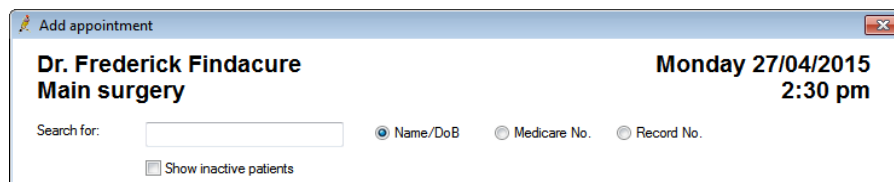
APPOINTMENT BOOK - LAYOUTS

Appointment book layouts have been available for a while. These have now been enhanced so that the **Layout** drop down will now automatically show an appointment book layout for each location that has sessions associated with it. There will always be a **Default** layout which will show all appointments for all users regardless of location. When you select a location layout, the user list on the left will be filtered to show only those users who have sessions at that location.

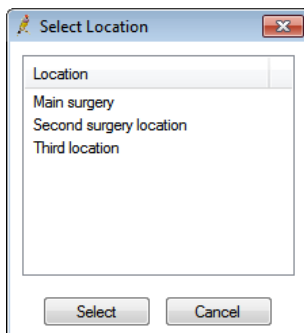
Depending upon the types of layouts you have already created it may be appropriate to delete obsolete layouts using **Setup > Configuration > Appointments > Appointment Book layouts**. These location layouts cannot however be customised as they are generated from the sessions in the system.

APPOINTMENTS - ADD / EDIT /MAKE APPOINTMENT

When you add a new appointment or edit an existing appointment, the location associated with the session time will show on the screen under the user's name.



Where there is no location associated with the session, a **select location** window will appear to allow you to specify the relevant location.



If no location is selected, the location showing on the **add / edit appointment** screen will display as **default**.

APPOINTMENT BOOK - DAILY MESSAGE

These changes to cater for multiple provider numbers and locations means that it is now possible to have a different daily message appear for different locations.

When you create a daily message there is a location drop down which allows you to select which location it applies to. If a message is associated with the default location it will appear on all appointment book layouts except when it is a location related layout which has its own daily message.

Any existing daily messages will be allocated to the **default** location during the upgrade.

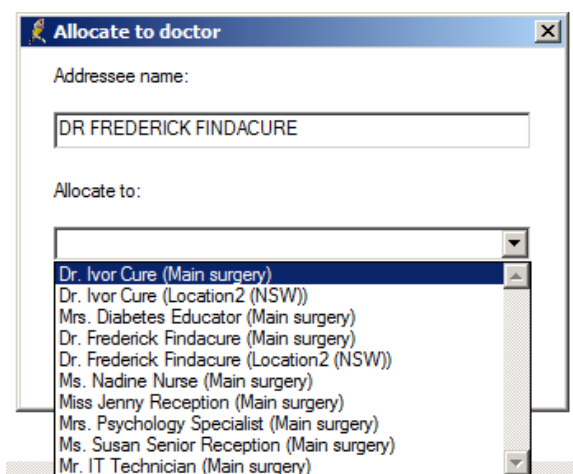
WAITING ROOM

The **Add to Waiting room** screen has been change to allow the user to select a location. The location selected will be the one associated with the appointment that is made and will override the location for that session time. By default, the location will be the default location for the provider and can be changed by clicking to the right of the location and selecting another location.

INCOMING REPORTS

When results / reports are imported into Bp Premier, they are automatically allocated to a provider and patient where possible. If allocated to a provider they are associated with the location related to the provider number contained in the result.

The **Incoming Reports** screen is used to allocate results that were not able to be allocated automatically. When you press the **Allocate to Doctor** button, the list of providers displayed now has providers who have multiple provider numbers listed twice with the location in bracket after their name. Users should attempt to link the result to the correct provider / location record if possible so it shows correctly in the **Follow up inbox**.



Regardless of which provider or location they are allocated to, they will still appear in a single Inbox for the provider to allocate.

INBOX

a) When results and reports are imported, they are now automatically associated with the location related to the provider number contained in the result. There will still however be only **one Inbox per provider** so that all items can be allocated in the one screen.

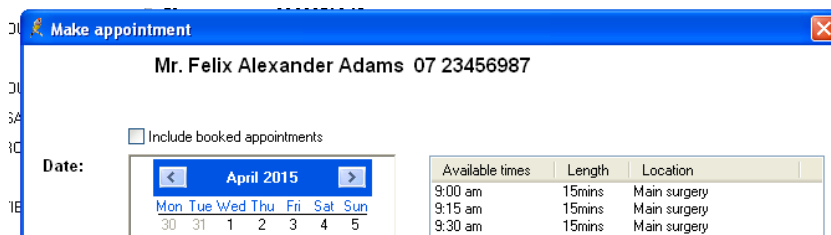
Note: This requires that the users have been merged as outlined above.

When looking at the result in the Inbox, there is a new field called **Store for Location**. Documents imported via the BDI will be allocated the location of the user importing the document.

This result is:	Action to be taken:	Store result in:	Store for location: Main surgery
<input type="radio"/> Normal <input type="radio"/> Abnormal <input type="radio"/> Stable <input type="radio"/> Acceptable	<input type="radio"/> No action <input type="radio"/> Reception to advise <input type="radio"/> Nurse to advise <input type="radio"/> Doctor to advise	<input checked="" type="radio"/> Investigations <input type="radio"/> Correspondence in <input type="radio"/> Clinical Images	<input checked="" type="checkbox"/> Include header <input type="button" value="Details"/>

If a result / report / document was imported prior to upgrading to this new version this **Store for Location** field will be blank. While not absolutely necessary, we recommend that each user set this value as they are actioning the item. The item will then be filtered correctly in the Follow up Inbox.

b) When creating a patient appointment using the **File > Patient appointments > New appointment** - the location of each appointment will be shown in a column next to the appointment length.



Make appointment

Mr. Felix Alexander Adams 07 23456987

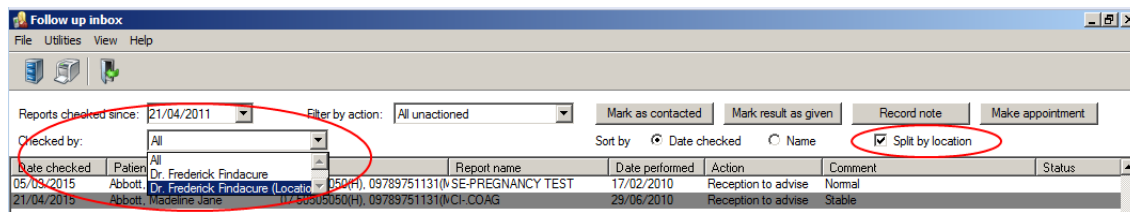
☐ Include booked appointments

Date: April 2015

Available times	Length	Location
9:00 am	15mins	Main surgery
9:15 am	15mins	Main surgery
9:30 am	15mins	Main surgery

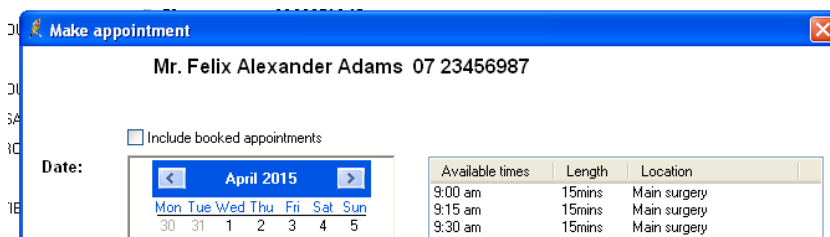
FOLLOW UP INBOX

a) There is a new filter on the **Follow up inbox** screen to allow users to **Split by location**. This has the effect of changing the **Checked by** drop down list to show providers multiple times if they have results related to different locations. This would be useful if different users process results related to different location. When splitting by location, selecting a provider that does not have a location next to their name will show any results that are not linked to a location.



If this **Split by location** tick box is not selected then the **Checked by** drop down list will work as before.

b) When using the **Make appointment** button - the location of each appointment will be shown in a column next to the appointment length.



PATIENT INVOICES / PAYMENTS

When creating invoices, a location drop down is located at the top right of the screen.

- If the account is created from an appointment, the location shown will be the one associated with that appointment.
- If the account is created from the Management screen, the location shown will be the current users logged in location.
 - Once a provider is selected, if the provider selected is set as the patient's **Usual doctor** the location will change to that provider's **usual location**.
 - The location can be changed manually by the user if required.
 - If the provider does not have a provider number for that location the system will use the provider number for their usual location.
 - The address printed on the invoice will be the one for the selected location.

When entering payments, a location drop down is located at the top right of the screen.

- Where a single invoice is being paid, the location will default to the location on the invoice being paid.
- Where multiple invoices are being paid, the location will default to the current user's logged in location but can be change if required

ONLINE CLAIMING BATCHES

When creating online claiming batches, there is now an additional **Location** drop down. This has been provided should your practice have different staff who are responsible for submitting claims for only those providers at their same location.

If a location is selected, the **Provider** drop down will only show providers who have invoices ready to be sent for that location.

If the location is set to **All**, the **Provider** drop down will show all providers who have invoices ready to be sent and will show the location in brackets after their name.

Both options will ensure that the batch created will only contain invoices which are linked to the provider number for the specific location.

PATIENT CLAIMING

Both the main **Patient claims** screen and the **Unsent Claims** screen will display a **Location** drop down filter.

This filter defaults to **All** locations however if a location is selected the system will show only those claims related to that location.

MANAGEMENT REPORTS

A new set of Management Reports have been included in this version to replace the older styled reports. These reports have been produced to simplify the reporting process and provide many other benefits.

- All reports can now be grouped by location and/or provider.
- These reports will utilise the location selected when creating the account or paying the account
- Report parameters can be selected when generating a report so that reports can be printed for individual or ranges of locations, individual or ranges of providers, ranges of items, ranges of payment types, etc. to give greater flexibility of how the report looks or is grouped.

In the past you often needed to print multiple reports to get all the data required and add totals together (ie Cash, EFT, Direct Debit). These new report/s will combine all the data into one with columns to separate totals. Reports also cater for adjustments showing original and adjustment reports as relevant with values outside of the report range being shown but not included in overall totals.

Refer to the section An overview of the New Management Reports for further details on how to use these reports.

DEBTOR LIST

On the **Debtor list** screen, when you select **Create Separate account for each provider** both **provider** and **location** drop down filters will appear enabling you to filter the list by a provider and / or location.

BANKING

On the **Banking** screen, when creating a batch and viewing the **Unbanked payments** there is now a **location** drop down filter to enable the user to more easily separate payments by location if required.

IMMUNISATIONS

- When adding Immunisations into the **patient record**, the **Billing provider** and **Given by** fields will now show the **location** next to the provider's name. If the provider works at more than one location they will appear multiple time.
- On the **Australian Immunisations Register** screen, a filter by **location** drop down has been added to this screen to allow you to filter the list by provider and / or location. This would be used if different users are responsible for sending the immunisations for each location.

WORD PROCESSOR

- When logged in as a provider, the template fields under **Current User** such as **full details** and **provider number** will be those for the current logged in location.
- When logged in as a non-provider, template fields under **Provider** will now show both provider and location columns.
 - The location shown will default to the provider's usual location
 - An alternate location can be selected by clicking on the location field and using the blue arrow.
 - Only locations for which the provider has a provider number are listed

MESSAGES

As a user with multiple provider numbers no longer need to have separate user records, messages are no longer location specific. Therefore when creating a new message, users will only be listed once which will ensure that they get messages no matter which location they are working at.

The **Message** screen has been restructured to show **groups** in the top and **users** at the bottom so it is less cluttered.

REMINDERS

- When creating reminders, a new **At location** drop down has been added to allow the user to indicate which location as well as which provider the reminder is related to. It will default to the user's current logged in location.
- When using the **Clinical > Reminders** function to generate reminders, the **Select patients for reminders** screen now has a **Location** section. This will show all locations that have reminders associated with them and allows the user to generate reminder lists / letters for specific locations if required. It is possible to set up Reminder templates that use **User Letterhead** template field rather than **Practice letterhead** which will pick up the location from the reminder and print the correct address.
- When **reminders** are created from an appointment, the reminder location will default to the one associated with the appointment.
- In other areas where you can create a reminder, the location will default to the user's logged in location.

ACCOUNT TEXT

It is now possible to have different account text print on invoices and receipts depending upon the location associated with that invoice or payment.

Select **Setup > Configuration > Account text** from the main **Bp Premier** screen.

At the bottom of the screen is a **Print for location** drop down. Change this location to the one that you want to customise the account text for and make any changes required then press the **Save** button. These changes will then be printed on accounts related to that location.

Setting up multiple practice locations

This information assumes that at your practice all data is stored in the Bp Premier database on the server, and the database is accessible by staff at your practice's different locations.

Bp Premier Lava introduces a number of improvements to streamline workflows for practices with multiple locations that share user and patient data. Follow the procedures below after you have upgraded to Lava.

Multiple practice locations and multiple Minor IDs

In Bp Premier Lava, it is not possible to have multiple Medicare Minor IDs within Bp Premier. All claims received by Medicare will use the location selected on the **Setup > Configuration > Online claiming** screen when transmitting. In Bp Premier, however, you can filter Medicare batches by provider and location.

To register multiple Medicare Minor IDs in Bp Premier, you must upgrade to Lava **Service Pack 1**. See **Setting up Online Claiming for multiple locations** on page 1.

ADD A LOCATION RECORD

There is only ever one practice name in the software. However, you can create multiple practice locations; when a user logs into the software, they select a location, which will be printed on scripts, invoices, and reports.

1. Select **Setup > Practice** from the Bp Premier screen. This will display the **Practice details** screen, which shows:
 - practice name
 - a summary of how many licenced users you have
 - the licence expiry date
 - the practice locations that are set up
 - contact details for the first location on file
2. Click **Add** next to the list of **Practice locations**. The **Location details** screen will appear.
3. Complete the details in the screen for the new location.
4. Click **Save** to add the practice location to practice details.


ADD THE USERS WHO WILL BE WORKING AT THAT LOCATION

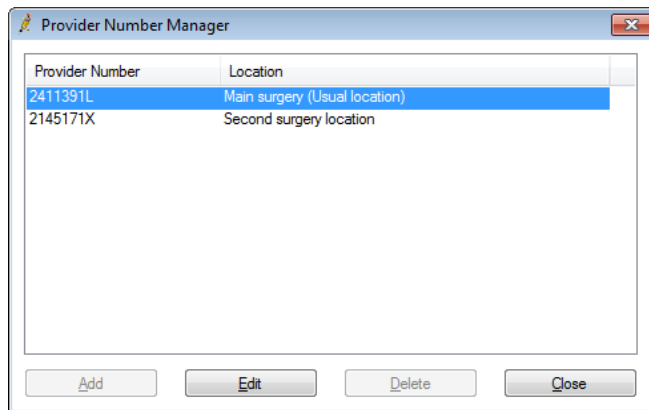
If the user does not currently have a user record in the database, create a new record using **Setup > Users > Add**.

If the user has worked in the practice, edit their user details using **Setup > Users > Edit**.

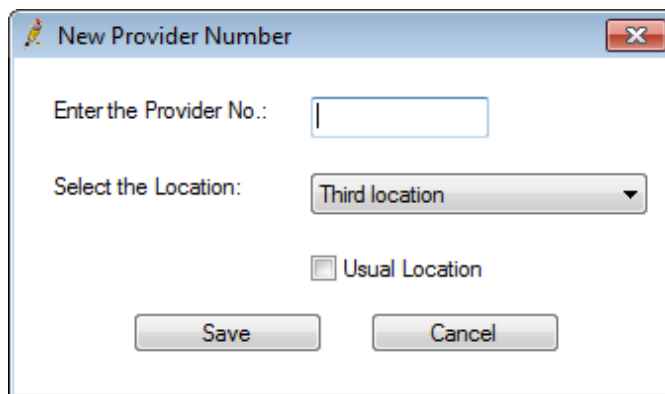
The **User details** screen will appear.

If the user has a provider number:

1. Click  to the right of the **Provider No.** field. The **Provider Number Manager** screen will appear.



2. Click **Add**. The **New Provider Number** screen will appear.



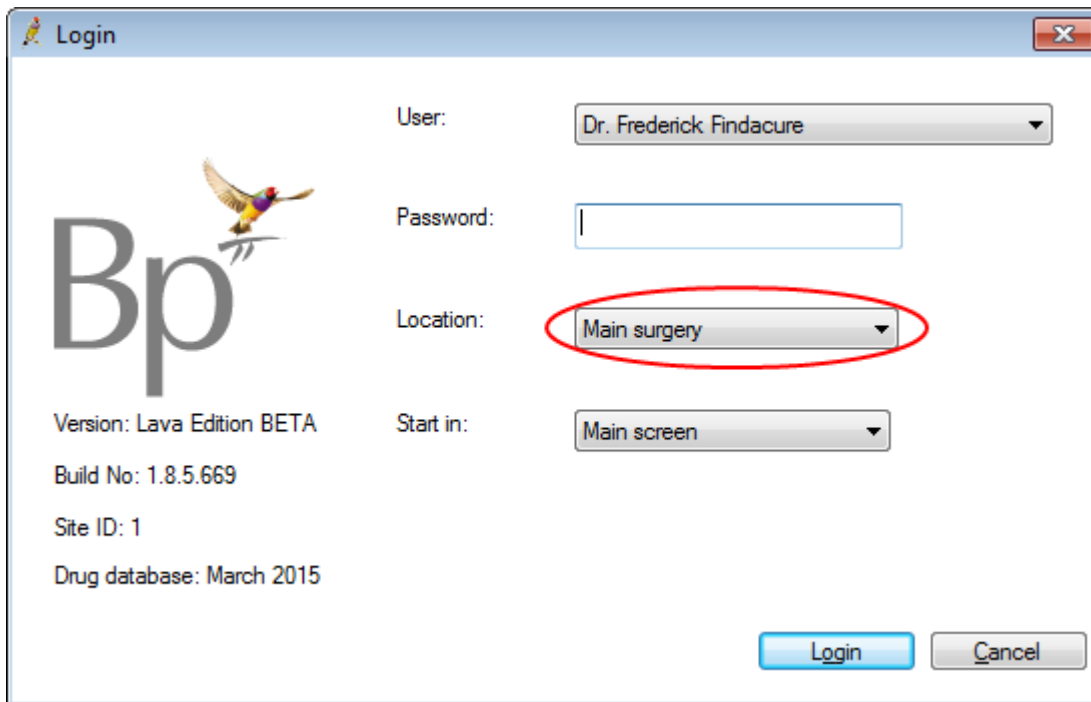
3. Enter the provider number, select the location associated, and click **Save**.

If the user does not have a provider number, set the user's usual location to be the one that they will be working at most often.

Update the management reports that the user has access to

Click **Set Reports** and check that this user has access to the **providers** and **locations** for the reports they need to print.

LOG IN (ALL USERS)



- Users who have multiple provider numbers will only see their name listed once on the Login screen, if the obsolete user accounts have been set to inactive. See [Moving to multiple provider numbers on page 20](#).
- All users must select the correct **Location** when logging in, because these details are reflected on items such as invoices, reports, and scripts.
- Users with provider numbers will only see the locations that they have provider numbers for.
- Users without provider numbers will see all locations listed.

The username at the bottom left of the main Bp Premier screen will show the user's name and logged-in location.

CREATE LETTERHEAD

Create a new letterhead in the word processor by selecting **Templates > Edit Letterhead** to reflect the address details for the new location. The new letterhead will take effect when a template or letter contains the **User letterhead** template field and the user is at the new location.

CUSTOMIZE ACCOUNT TEXT

You can have different account text print on invoices and receipts depending upon the location associated with that invoice or payment.

Select **Setup > Configuration > Account text** from the main screen.

Change **Print for location** to the one that you want to customise the account text for. Make any changes and click **Save**. Changes will be printed on accounts related to that location.

PAYER ALLOCATION RECORDS

Payer allocation records allow you to specify that online claiming payments for one provider will be paid into the bank account of another. The **Select Provider** drop down will now show the location in brackets after the provider name to cater for circumstances where a provider is paid differently per location.

ADD BANK ACCOUNTS

Add new **practice** and **provider** bank accounts for the new location.

Moving to multiple provider numbers

This information is for existing Bp Premier customers who have just upgraded, or are about to upgrade to Bp Premier Lava.

Review the steps below to ensure that your system is ready to handle the new multiple provider number functionality.

We recommend that you decide on a date and time when you will carry out the configuration. Ideally this should be just after the update and before users log back into the system.

BEFORE YOU UPGRADE

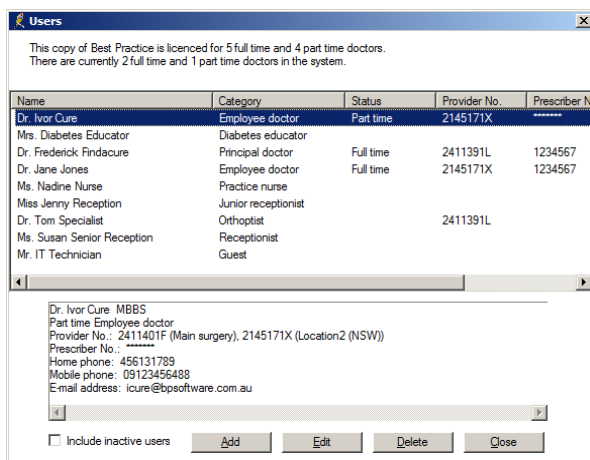
If you have only one practice location:

- Review **Workflow changes from multiple practice locations on page 8** to ensure your users know what will change that may affect their workflow.

If you have more than one practice location:

Make a list of each person who has multiple provider numbers

- Select **Setup > Users** from the main screen to display the **Users** screen.



Name	Category	Status	Provider No.	Prescriber No.
Dr. Ivor Cure	Employee doctor	Part time	2145171X	*****
Mrs. Diabetes Educator	Diabetes educator			
Dr. Frederick Finsdore	Principal doctor	Full time	2411391L	1234567
Dr. Jane Jones	Employee doctor	Full time	2145171X	1234567
Ms. Nadine Nurse	Practice nurse			
Miss Jenny Reception	Junior receptionist			
Dr. Tom Specialist	Orthoptist		2411391L	
Ms. Susan Senior Reception	Receptionist			
Mr. IT Technician	Guest			

Dr. Ivor Cure: MBBS
 Part time Employee doctor
 Provider No.: 2411401F (Main surgery), 2145171X (Location2 (NSW))
 Prescriber No.: *****
 Home phone: 456131789
 Mobile phone: 09123456488
 E-mail address: icure@bpsoftware.com.au

☐ Include inactive users Add Edit Delete Close

- Record the **Provider No.** for each person and which location each is associated with.

Identify which record will be kept

- most likely the one with their 'real' name.
- open this user record and make sure that they have the correct 'default location' set.

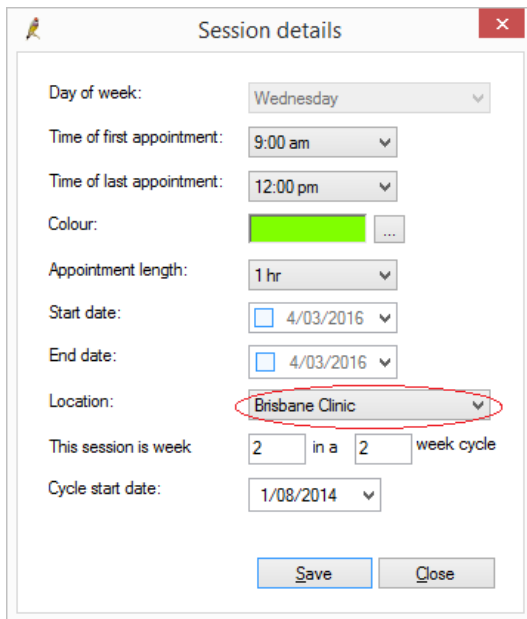
For each user affected

1. Log in as the user which will be set **inactive**.
2. Read and action everything in their Inbox.
3. Read and action all messages.

1. Log in as the user which will be set **active**.
2. Review the user preferences to ensure the user record being kept will work the way they expect it to.
3. Check pathology and imaging preferences to ensure they have the correct custom tests and reasons, favourite tests, and laboratory details.

Update all sessions to ensure that they all have a location set

- Select **Setup > Sessions** from the main screen.
- Open each session and make sure the session is associated with the correct location.



The screenshot shows a 'Session details' dialog box with the following fields:

- Day of week: Wednesday
- Time of first appointment: 9:00 am
- Time of last appointment: 12:00 pm
- Colour: (color selection box)
- Appointment length: 1 hr
- Start date: 4/03/2016
- End date: 4/03/2016
- Location: Brisbane Clinic (highlighted with a red circle)
- This session is week 2 in a 2 week cycle
- Cycle start date: 1/08/2014

Buttons at the bottom: Save, Close

AFTER YOU UPGRADE

If you have only one practice location, you do not need to do anything more, because the program upgrade will automatically update each user's record with the correct provider number and location. See [Workflow changes from multiple practice locations on page 8](#) to view changes to workflows and the Bp Premier user interface for multiple provider numbers and locations.

If you have more than one practice location:

Prepare to consolidate users

Identify users with multiple provider numbers and associated locations as described above.

Update practice details

Select **Setup > Practice details** from the Bp Premier screen. This will display the **Practice details** screen, which includes:

- practice name
- a summary of how many licenced users you have

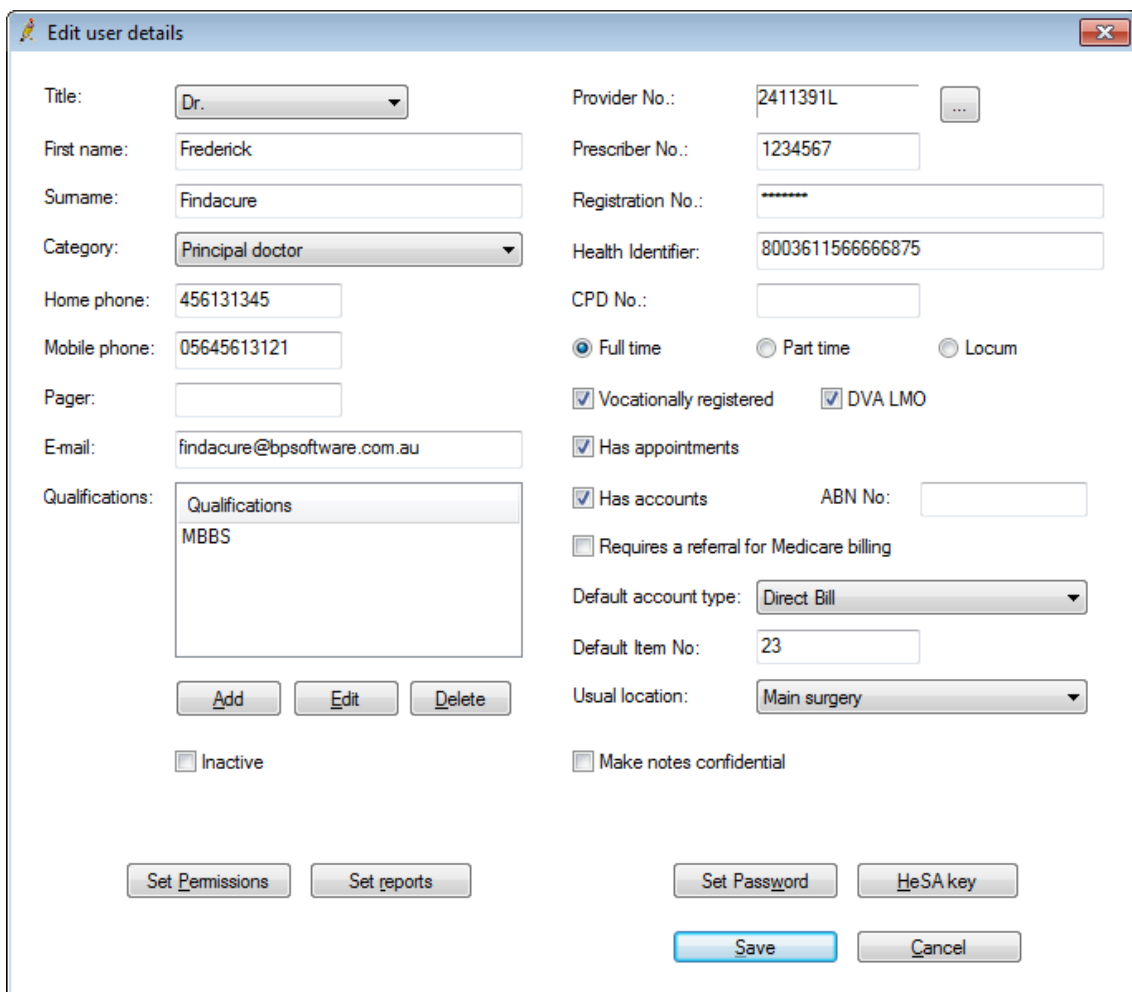
- the licence expiry date
- each practice locations that are set up
- contact details for the first location on file.

Click **Change**. Update any details that need updating after the upgrade. Click **Save**.

Combine user details records

Using the list of providers and locations:

1. Identify one record per user to be retained as the user's 'active' record.
2. Select **Setup > Users** > select the user name and click **Edit**. The **Edit user details** screen will appear.



Edit user details

Title:

First name:

Surname:

Category:

Home phone:

Mobile phone:

Pager:

E-mail:

Qualifications:

Provider No.:

Prescriber No.:

Registration No.:

Health Identifier:

CPD No.:

☒ Full time ☐ Part time ☐ Locum

☒ Vocationally registered ☒ DVA LMO

☒ Has appointments

☒ Has accounts ABN No:


☐ Requires a referral for Medicare billing

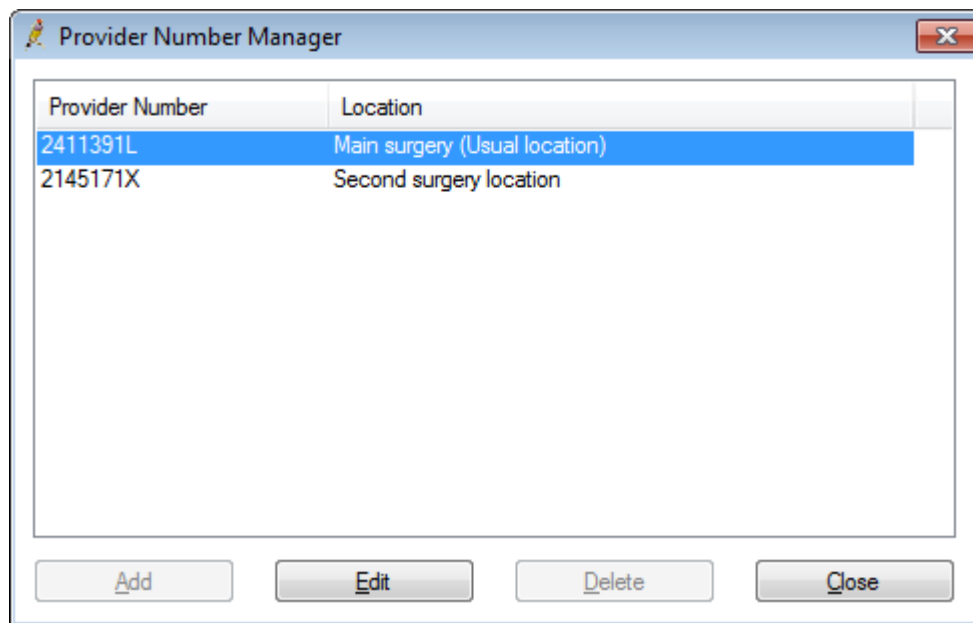
Default account type:

Default Item No:

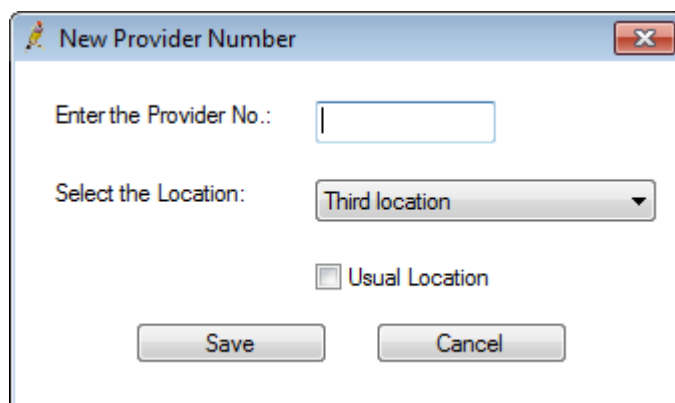
Usual location:

☐ Inactive ☐ Make notes confidential

3. Check that all the user details are correct.
4. The **Provider No.** field appears in the top right hand corner. This is the provider number associated with their usual location.
5. Click  to the right of the number. The **Provider Number Manager** screen will appear.



6. To add additional provider numbers, click **Add**. The **New Provider Number** screen will appear.



7. Enter the provider number and select the location that it is associated with and click **Save**.
8. Repeat steps 6–7 for each provider number for this user.
9. When all provider numbers are added, click **Close** to return to the **Edit user details** screen.
10. Click **Save**.
11. Repeat steps 1–10 for each user with multiple provider numbers.

Add pathology and radiology preferences to the user that will be retained

Each user you are changing should be advised that their records are being altered. Users should log in as the user you have retained and update their pathology and radiology preferences.

Recreate sessions and appointments

If you use the management module, you will need to recreate sessions for the retained user if any sessions exist for obsolete users.

1. Select **Setup > Sessions**.
2. For each user record that will become obsolete, take a screen shot of all their sessions, extra sessions, days away and 'On the day' appointments ensuring you can see all columns.
3. For the user record that will remain active, add sessions, extra sessions, days away and 'On the day' appointments from the screenshots taken for the related users who will be made obsolete.

If you use the management module, all appointments for the obsolete user records will need to be moved to the active user.

1. Open the appointment book and change the layout to 'default' and the setting under the list of users to ticked.
2. Tick the user names related to the user being updated so you have a column for each of their related user records.
3. Copy and paste each appointment from the user that are to become obsolete to the same appointment time slot for the user who will remain active.
4. Repeat for each user being updated.

Delete the sessions for the 'obsolete' user records.

1. Return to **Setup > Sessions**.
2. For each obsolete user, delete all sessions, extra sessions, days away and 'On the day' appointments.

Mark each obsolete user record as inactive

For each user record that will become obsolete:

1. Log in as the obsolete user, read all and clear their **Messages** and **To do list**. Log out again.
2. Log back in and select **Setup > Users**. Select the record to be made inactive and click **Edit**.
3. Tick **Inactive**.
4. Click **Save**. A warning message will appear: you will not be able to reactivate this user for seven days.
5. Click **Yes**.

Update management report access

For each user record that will become obsolete:

1. Select **Users > Set Reports** and check that this user has access to the **providers** and **locations** for the reports they will need to print.

Bp Premier Upgrade Checklist - Lava SP1

The information listed in the tables below should be considered prior to, during, and after upgrading your current version of Best Practice Premier to the Bp Premier Lava Service Pack 1 edition.

Practice details for upgrade			
Centre Name:		IT Professional Name:	
Staff member managing upgrade:		IT Professional Contact number:	
Upgrade date and time:			

STEP 1: PREPARE THE PRACTICE FOR UPGRADE

✓	Item	Further Information
	Staff Training	Ensure staff have been briefed on up-coming changes. We recommend that key staff review the Bp Premier Lava SP1 Release Notes and that any significant changes are discussed in a staff meeting. Videos and other information will also be available via the Best Practice Software website.
		Sign up for our free Webinar series featuring all that you need to know about Lava. Keep an eye on our website and newsletter for dates and times.
	Upgrade timing	The server upgrade should be performed outside of hours while Bp Premier is not in use. Upgrade the server before upgrading any workstations.
	Check the Release Notes for any prerequisites required before upgrading	Is the prerequisite program version already in use at the practice? Is the prerequisite drug database version already in use at the practice?
	Contact your IT Professional	Discuss the upgrade with your IT Support Professional. Best Practice Software recommend confirming the following topics: <ul style="list-style-type: none"> ■ Ensure the correct 3rd party software or drivers will be available during the upgrade ■ Discuss upgrade timing ■ Discuss disaster recovery and ensure you have a tested rollback plan.
	Prepare for changes related to Multiple Minor IDs	The Lava SP1 release has enhanced support for practices with multiple locations who require multiple Minor ID Numbers. If this feature is applicable to your practice, you will need to update your Medicare Online Claiming configuration after install.
	Back up the database and test your backups	Perform a backup and test that the backup can be restored to a test server to ensure that backups are working as expected.

STEP 2: UPGRADE BP PREMIER

✓	Item	Further Information
	Download the program upgrade utility (only if you are unable to receive a Lava SP1 Upgrade DVD)	Ensure that the program upgrade utility is copied to all workstations. This will assist with eliminating any last minute issues you may have copying files to workstations during the upgrade process.
	Ensure sufficient time is allocated for the upgrade process to occur	Ensure your IT Professional has allocated adequate time for the upgrade to run. Best Practice Software recommend that all upgrades are completed before or after business hours.
	Perform a backup prior to upgrade	Ensure that a successful backup is taken immediately prior to the upgrade occurring and that no users log in again until the server has been upgraded
	Upgrade the server before any workstations	Terminal Server sites - ensure that all users are logged off the server prior to starting upgrade Laptops – ensure that all laptops that have downloaded data are returned to the practice and synchronised with the server data before upgrading the server
	Test the upgrade	Ensure that the upgrade is tested and considered successful before workstation upgrades are started or the centre opens for business.
	Upgrade all workstations	Clients that are not upgraded to the new version will be unable to access the management module.

STEP 3: AFTER YOU UPGRADE

✓	Item	Further Information
	Update your Medicare Online configuraiton, if your practice requires multiple Minor IDs.	See Setting up Online Claiming for multiple locations on the facing page for instructions on supporting multiple Minor IDs. <i>Note: This is not mandatory and you may wish to complete this at a later stage.</i>
	John Murtaugh's patient documentation	John Murtagh's patient education leaflets are now available from patient education resources.
	Recall appointments	Practice nurses can now cancel Recall appointments.
	Reports	Payment reports, transaction reports, and the Reversed Payment report now include details on bounced cheques.

Setting up Online Claiming for multiple locations



Important: If you are using another Management package that uses Online Claiming, you will need to finalise and receipt all claims in that package **before** configuring Bp Premier for Online Claiming. Medicare Online Claiming can only operate from one software package at a time.

If you have installed Bp Premier Lava Service Pack 1, you can set up Medicare Online claiming if your practice has more than one physical location, and uses multiple Minor IDs.

Follow the instructions in this section if any of the following apply:

- your practice had several Minor IDs registered with your previous Practice Management Software, and you want to keep using them
- your practice is adding a new location that will have a separate Minor ID and certificate.

If your practice has multiple locations, but you only use one Minor ID for Medicare online claiming, follow the instructions for Setting up Online Claiming for single location.

For more information about registering multiple Minor IDs and possible impacts on PIP payments, refer to the Department of Human Services [website](#).

If you have set up Medicare Online previously at your practice, you may already have completed steps 1 (Obtain Minor ID) and 2 (Register with Medicare).

CAN I INSTALL MULTIPLE NASH CERTIFICATES?

From Lava Service Pack 1, sites will be able to register and claim against multiple Minor IDs in the software. Each Minor ID will require a matching Medicare Site certificate to enable Medicare online claiming.

However, the NASH certificate (or eHealth Record Site Certificate), which is the certificate used to identify the practice to My Health Record online, is independent of the Minor ID. Your practice does not need to install multiple NASH certificates based on the number of Minor IDs registered in the software.

You only need to update your NASH certificate if your practice changes the HPI-O number (**Setup > Practice Details > Change > Health Identifier**) or the certificate is about to expire.

NASH certificates and practice incentives

There is no incentive benefit to a practice for installing more than one NASH certificate. A NASH certificate applies only to accessing My Health Record online and secure messaging. NASH certificates have no effect on how Medicare calculates Standardised Whole Patient Equivalent (SWPE) values for a practice.

For more information on practice incentives, refer to the Department of Human Services [website](#).

IF YOU CHANGED TO BP FROM ANOTHER BILLING PACKAGE

If you recently changed from another billing package, your practice may not have the latest Medicare

Online components for Bp Premier installed. Check the following:

1. From the main menu, click **Help > About** and check that the **Build No.** shows '1.8.6.759' or higher and the **Version** shows 'Lava Service Pack 1'.
2. In Windows File Explorer, browse to the C:\ drive of the Bp Premier server and look for the folder C:\Program Data\BPOnline.

If the folder does not exist, the Medicare components have not been installed during the installation of Bp. To apply these components, close down the Bp Premier server and reapply the program upgrade for your version of Bp Premier. When you reach the **Online Claiming** installation screen, tick **Install the Best Practice Software Online Claiming module**.

3. Browse again to the folder C:\Program Data\BPOnline. If the folder still does not exist, contact Best Practice Software Support for assistance.

1. OBTAIN YOUR MINOR ID

The Minor ID is an 8 digit number derived from your Best Practice Software Site ID.

1. Identify your Site ID. Select **Help > About** from the main Bp Premier screen. Your **Site ID** is displayed in the bottom left of the screen.
2. Take your BP Site ID and prefix it with the letters **BPS**.
3. Pad the ID with zeroes so that the total length is 8 characters.

For example, if your Best Practice Software Site ID is '849', your Medicare Minor ID number would be 'BPS00849'.

If your practice uses multiple Site IDs, you will have a Minor ID for each Site ID.

If you are adding a new location to your existing Bp Premier installation that will require a new Minor ID and Medicare Site Certificate, contact the Best Practice Software Relationship team on 1300 401 111.

2. REGISTER WITH MEDICARE

You must register and obtain a Medicare Site certificate for each practice location.

- If you are already registered but are using another management package, you can use your current site certificates to set up Medicare Online in Bp Premier, but you will still need to notify Medicare to tell them you are now using Bp Premier. You will have to supply all Minor IDs.
- If you are not currently registered, you will need to register and apply for a Medicare Site Certificate. You will have to supply all Minor IDs.
- Each time you add a new doctor to a location, you will have to notify Medicare to add this doctor.

The *Practice Details Form* for online claiming and *Payee Provider Banking Details Form* can be found in the list of Medicare forms at:

<http://www.humanservices.gov.au/health-professionals/forms/>

3. ENABLE ONLINE CLAIMING

If you have obtained a current Medicare Site certificate and Minor ID for each of your practice

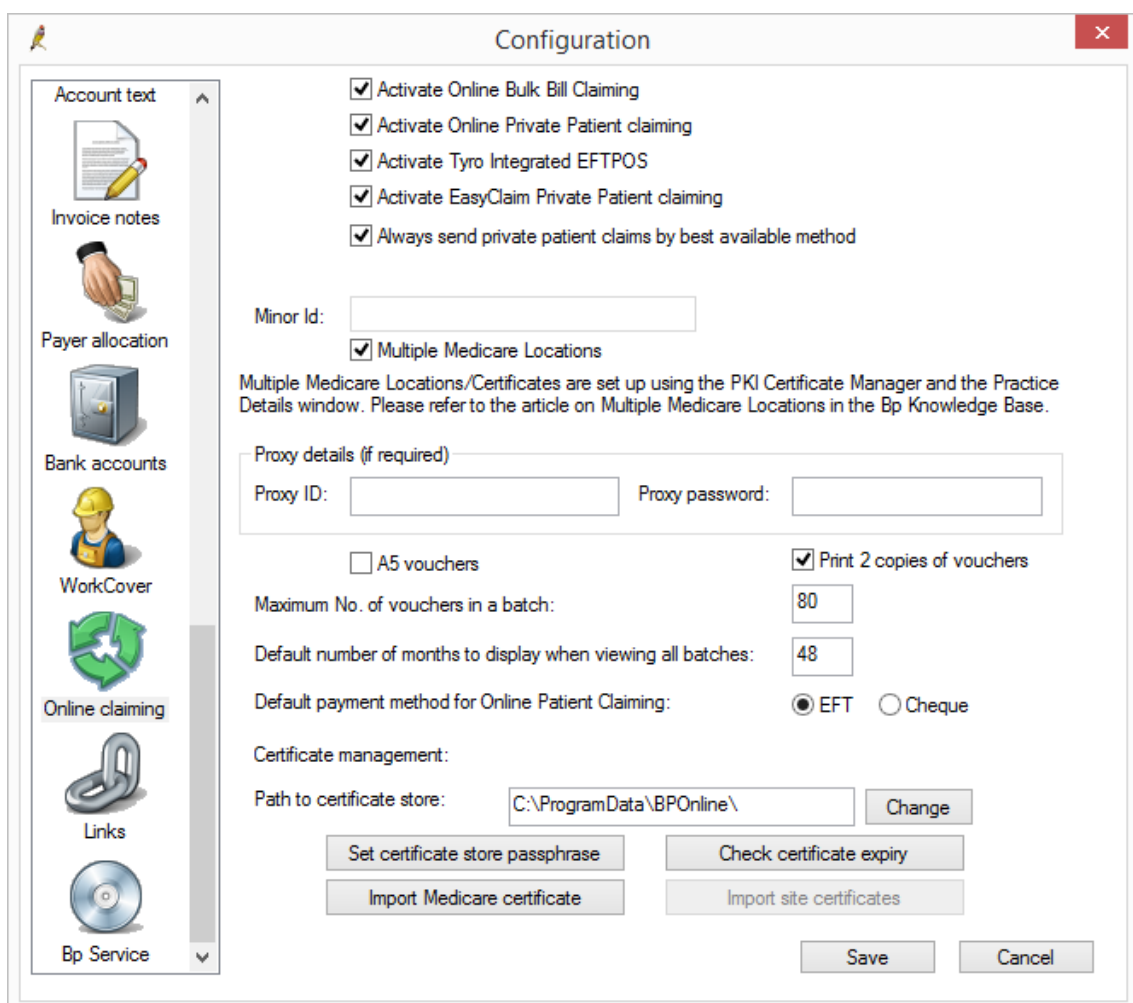
locations, you are ready to set up Medicare Online claiming in Bp Premier.

I have already set up Medicare Online claiming for one practice location

If you have already configured Bp Premier for one practice location, and just need to add the site certificates for new practice locations, select **Setup > Configuration > Online Claiming** from the main screen and tick the **Multiple Medicare Locations** checkbox. Go to [4. Import site certificates on page 32](#).

This is the first time I am setting up Online Claiming for Bp Premier

1. Log in to the Bp Premier server as a user with administrator permissions.
2. Select **Setup > Configuration** from the main screen. Select the **Online claiming** tab.



The screenshot shows the 'Configuration' window with the 'Online claiming' tab selected. The left sidebar contains icons for Account text, Invoice notes, Payer allocation, Bank accounts, WorkCover, Online claiming (selected), Links, and Bp Service. The main area contains the following settings:

- ☒ Activate Online Bulk Bill Claiming
- ☒ Activate Online Private Patient claiming
- ☒ Activate Tyro Integrated EFTPOS
- ☒ Activate EasyClaim Private Patient claiming
- ☒ Always send private patient claims by best available method
- Minor Id:
- ☒ Multiple Medicare Locations
- Multiple Medicare Locations/Certificates are set up using the PKI Certificate Manager and the Practice Details window. Please refer to the article on Multiple Medicare Locations in the Bp Knowledge Base.
- Proxy details (if required):
 - Proxy ID:
 - Proxy password:
- ☐ A5 vouchers
- ☒ Print 2 copies of vouchers
- Maximum No. of vouchers in a batch:
- Default number of months to display when viewing all batches:
- Default payment method for Online Patient Claiming: ☒ EFT ☐ Cheque
- Certificate management:
 - Path to certificate store:
 -
 -
 -
 -
-

3. Complete the fields in this screen, using the table below for guidance.

Field	Description
Activate Online Bulk Bill Claiming	Tick to activate online claiming for bulk billing, if your practice offers bulk billing and wishes to process bulk billing claims through Medicare online claiming.

Field	Description
Activate Online Private Patient Claiming	Tick to activate online claiming for private patients, if you wish to process patient claims through Medicare online claiming.
Activate Tyro Integrated EFTPOS	Tick this option if your practice uses a Tyro terminal and you wish to process online claims through the Tyro terminal. See Configuring Tyro for more information.
Activate EasyClaim Private Patient Claiming	Tick this option if you wish to process Easyclaim payments through the Tyro terminal. See Configuring Tyro for more information.
Always send private patient claims by best available method	Tick if you intend to use the Online Patient Claiming for private billings and wish to default for all private claims to be sent to Medicare.
Minor ID	If you are setting up Medicare Online claiming for multiple locations, leave this field empty.
Multiple Medicare Locations	Tick this checkbox.

Field	Description
Proxy details	<p>If you are unsure whether your practice's network uses a proxy server, contact your IT system administrator for advice.</p> <p>When the Medicare components are installed, the installer automatically creates the environment variables EASY_API_LOG, EASY_PARM1, EASY_PARM2, and HICOL_LIB_PATH. If your site uses a proxy server, you will need to create two additional environment variables within Windows on each Bp workstation that will process Medicare online claims.</p> <p>These variables are:</p> <ul style="list-style-type: none"> ■ EASY_PARM3 — name of the proxy server ■ EASY_PARM4 — port for the proxy server. <p>If your practice's Bp machines use system variables, add the two environment variables on each workstation. If your practice's Bp machines use user variables, add the two environment variables for each Windows user on each workstation.</p> <p>If you are unsure how to add environment variables in Windows, contact your IT support or Best Practice Software Support.</p> <p>Medicare Online will need to communicate through your proxy server to access the Medicare servers. Depending upon your proxy server, you may need to allow traffic to and from the Medicare Australia URL: https://www2.medicareaustralia.gov.au/pext.</p> <p>If your proxy server also requires a 'User name' and 'Password', enter the Proxy ID and Proxy password.</p>
A5 Vouchers	Tick to print Medicare and DVA vouchers as two separate A5 pages. If not selected, the two copies will print side by side on a single A4 page.
Print 2 copies of vouchers	Tick if you wish to print two copies of each Medicare assignment form.
Maximum No of vouchers in a batch	Defaults to 80. This is the recommended maximum batch size, but can be reduced. Best Practice Software do not recommend that you increase this value.
Default number of months to display when viewing all batches	Sets the default number of months to display when viewing batches from the Direct Bill Batches screen.
Default payment method for Online Patient Claiming	Defaults to EFT or Cheque when processing online claims.

Field	Description
Path to Certificate Store	<p>The certificate store is created on the Bp Premier server and shared by all workstations where transmission to Medicare is to occur. This path is where Bp will store the certificates after they are imported using the Import Medicare Certificate and Import site certificates buttons.</p> <p>DO NOT copy your Medicare certificates manually into this folder. Certificates must be imported using the buttons. Do not change this folder from C:\ProgramData\BPOnline\.</p>

- Click **Change** to display the **Path to Certificate Store** screen. Click **Save**. Bp will prompt that the certificate store does not exist and ask 'Would you like to create one now?'
- Click **Yes** to create the store. You will be prompted for a passphrase for the certificate store.

***Note:** Do not misplace this password. You are responsible for this password; Best Practice Software cannot retrieve this for you.*

- Click **Import Medicare certificate** to import the Medicare Australia public key. The **HeSA Certificates** screen will appear, showing the currently installed certificates.
- Click **Change folder**. Navigate to the folder C:\Program Files\Best Practice Software\BPS\MedicareCerts and click **OK**.
- Select a certificate labelled 'Medicare Australia...' and click **Attach**. If the certificate is imported successfully, Bp Premier will display 'The certificate was successfully imported'.
- Repeat step 8 for each certificate labelled with 'Medicare Australia'.
- Click **Close** to close the **HeSA Certificates** screen. Keep the **Configuration** screen open.

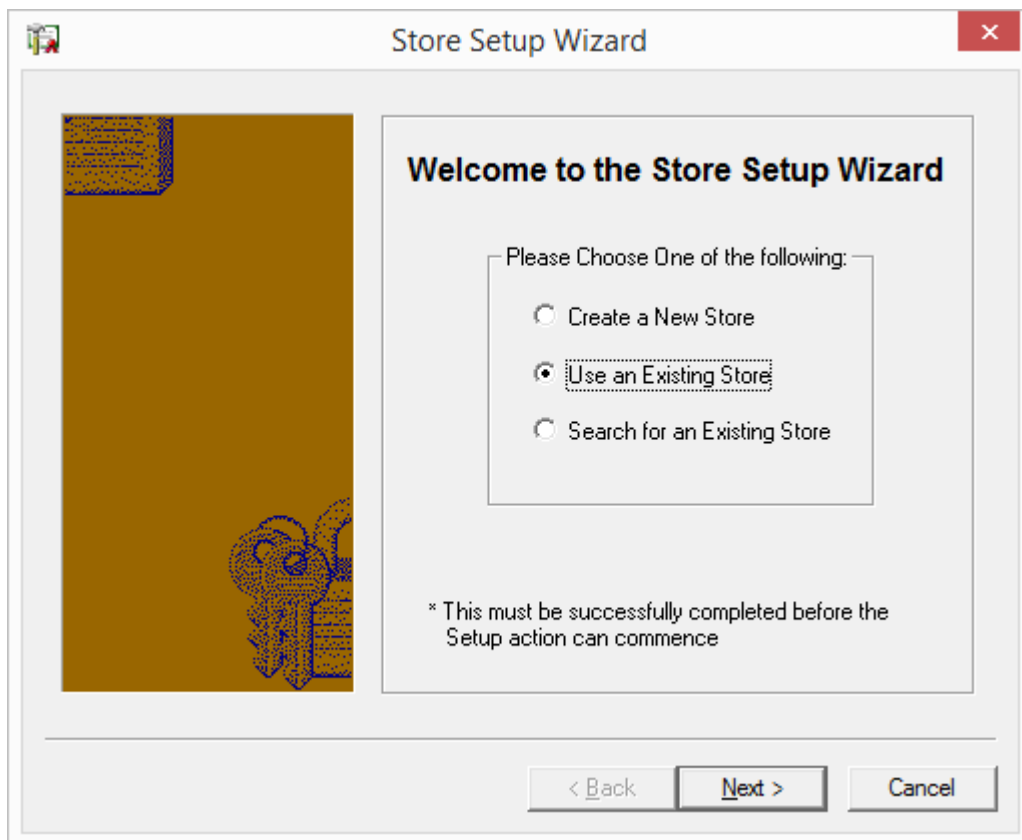
4. IMPORT SITE CERTIFICATES

If you ticked **Multiple Medicare Locations**, the **Import Site Certificates** button will be disabled. You must import Medicare Site certificates using Medicare's PKI certificate manager.

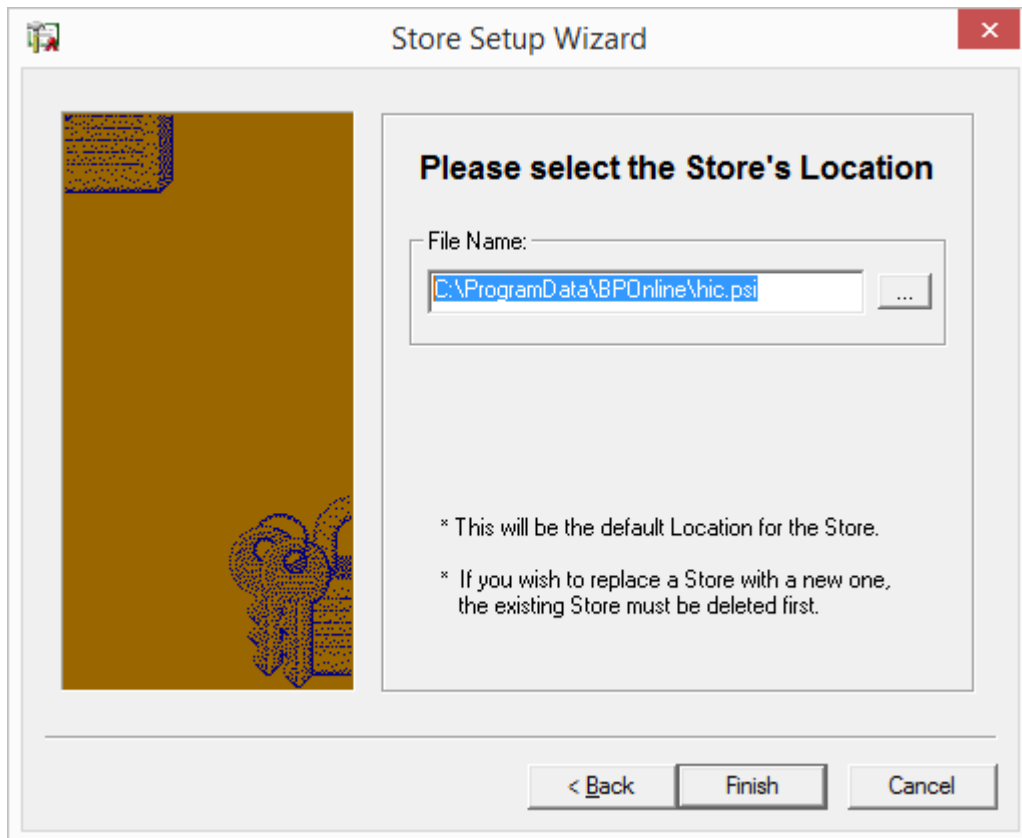
- Install the PKI certificate manager on the Bp Premier server.

Go to the [Department of Human Services PKI page](#) and click the link at the bottom of the page to install the **PKI Certificate Manager Installer** software.

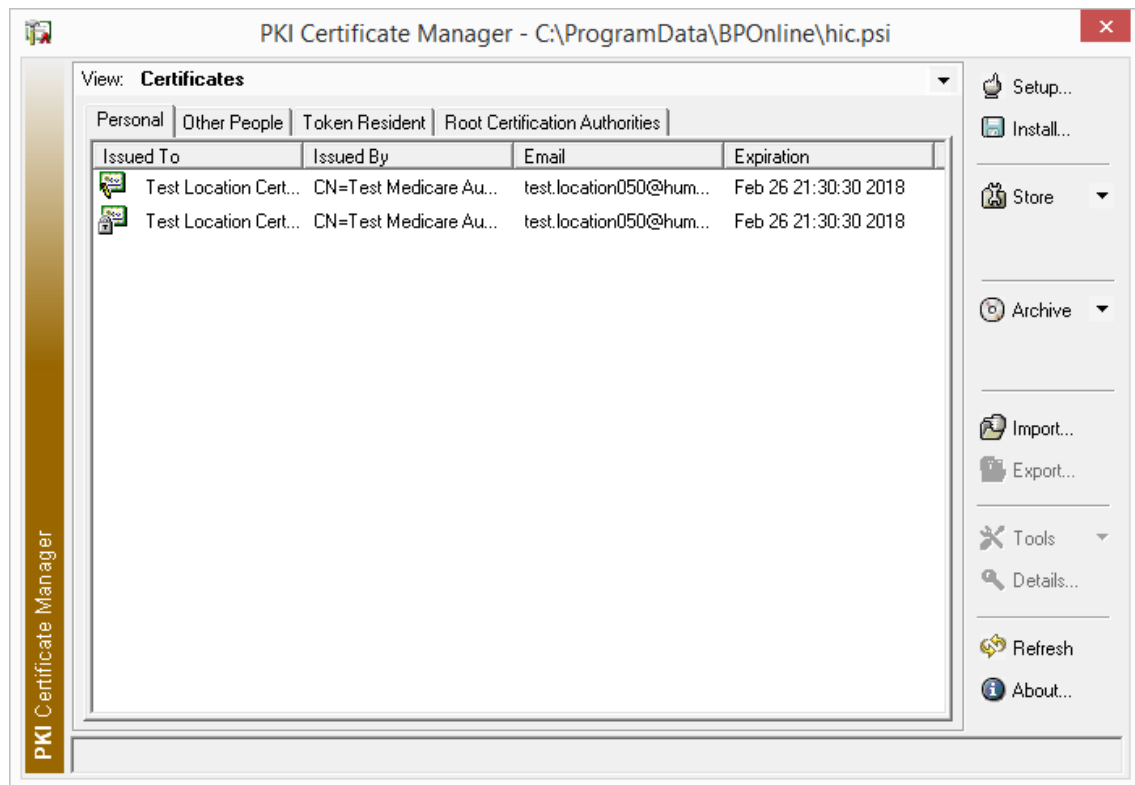
- Run the PKI Certificate Manager. The **Store Setup Wizard** will appear.



3. Select **Use an Existing Store** and click **Next**.

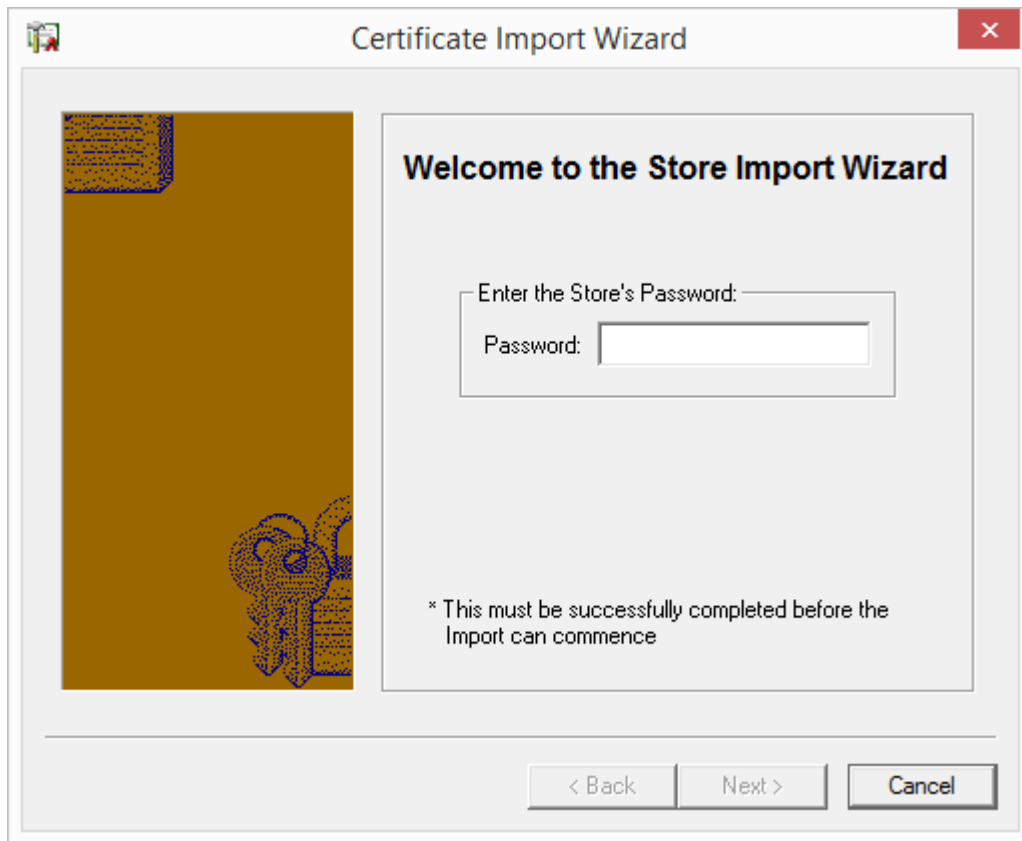


4. Click ... and browse to the file **C:\ProgramData\BPOnline\hic.psi**. Click **Open**, and click **Finish** on the Store Setup Wizard. The **PKI Certificate Manager** screen will appear.

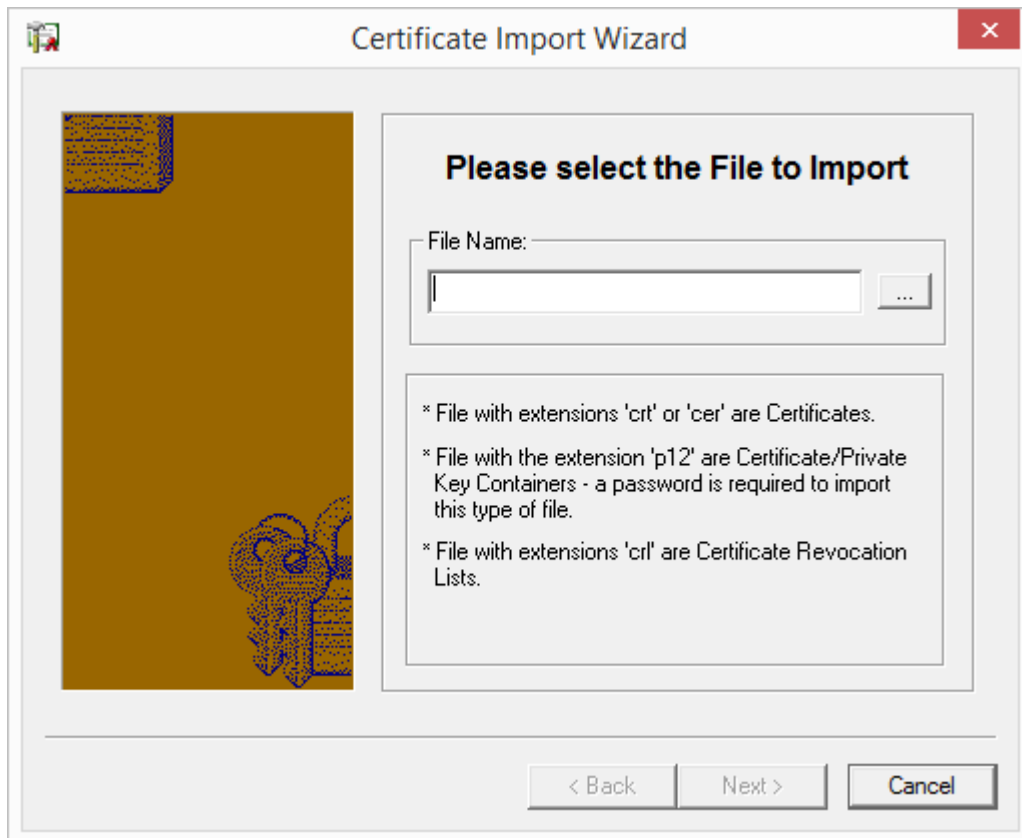


If you have previously configured Bp Premier for Medicare Online, two certificates will already be listed in the **Personal** tab. These certificates apply to the location you had specified as the primary location for your practice. If you have not set up Medicare Online before, the **Personal** tab will be empty.

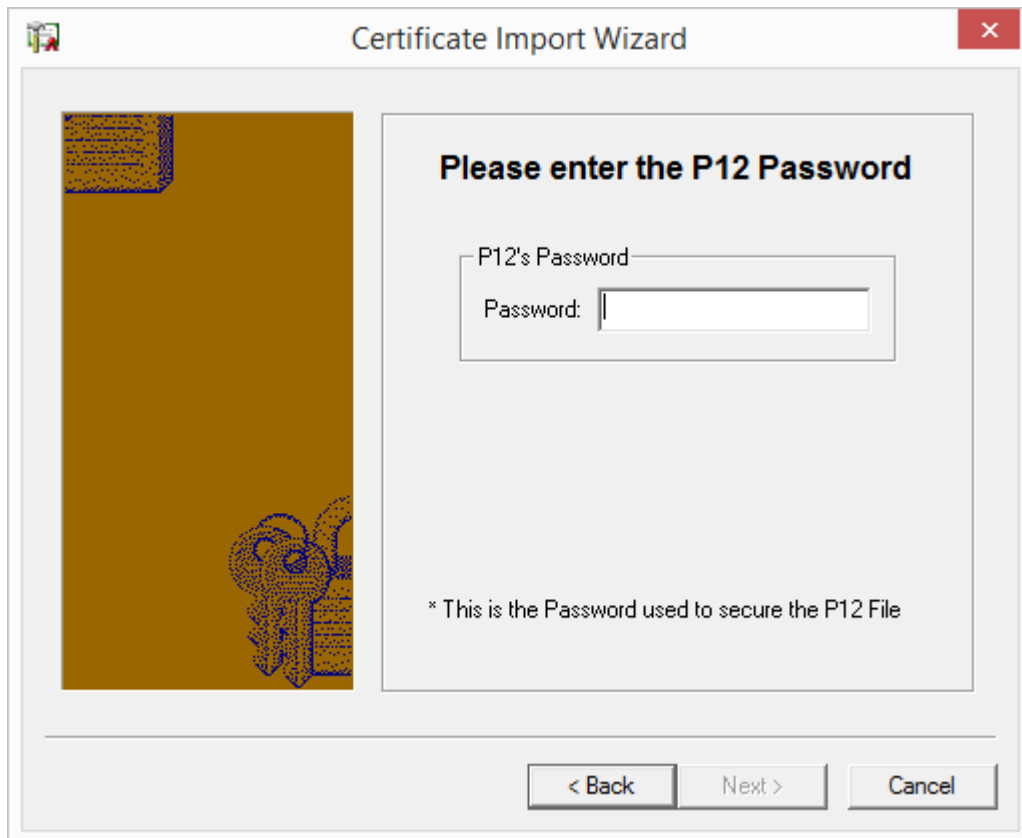
5. Click **Import....** The **Certificate Import Wizard** will appear.



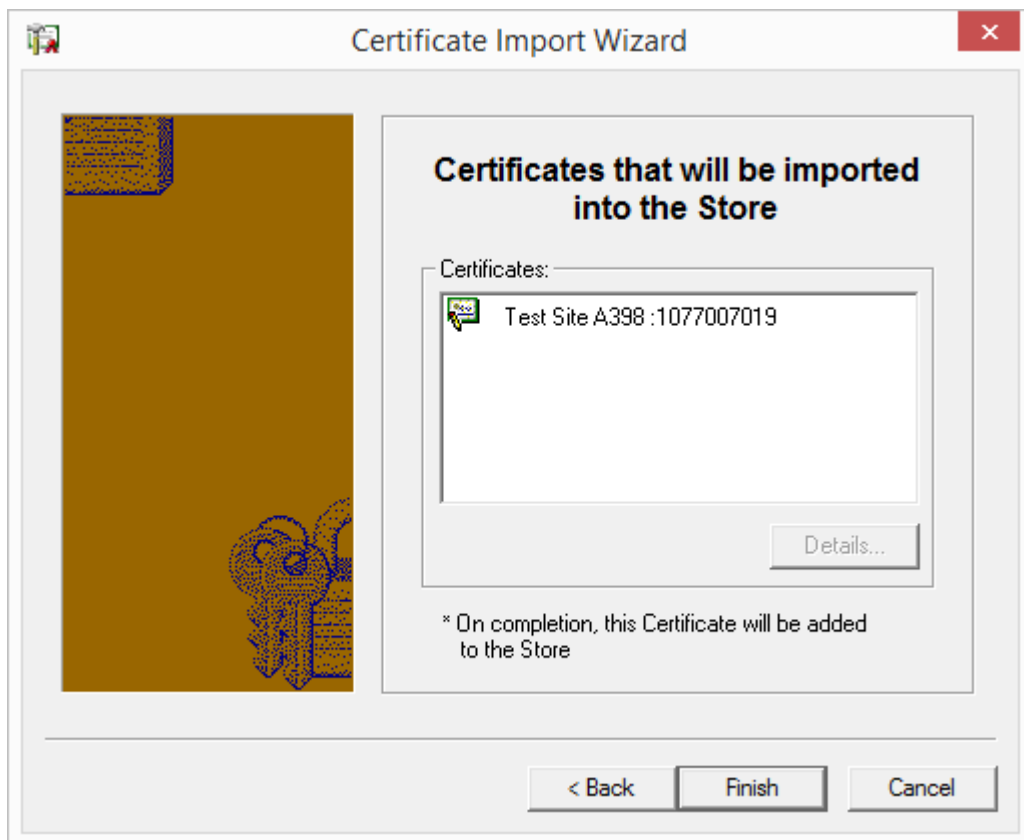
6. Enter the passphrase for the certificate store, supplied to you by Medicare. The passphrase is the same password set for the certificate store when first setting up Medicare Online. Click **Next**.



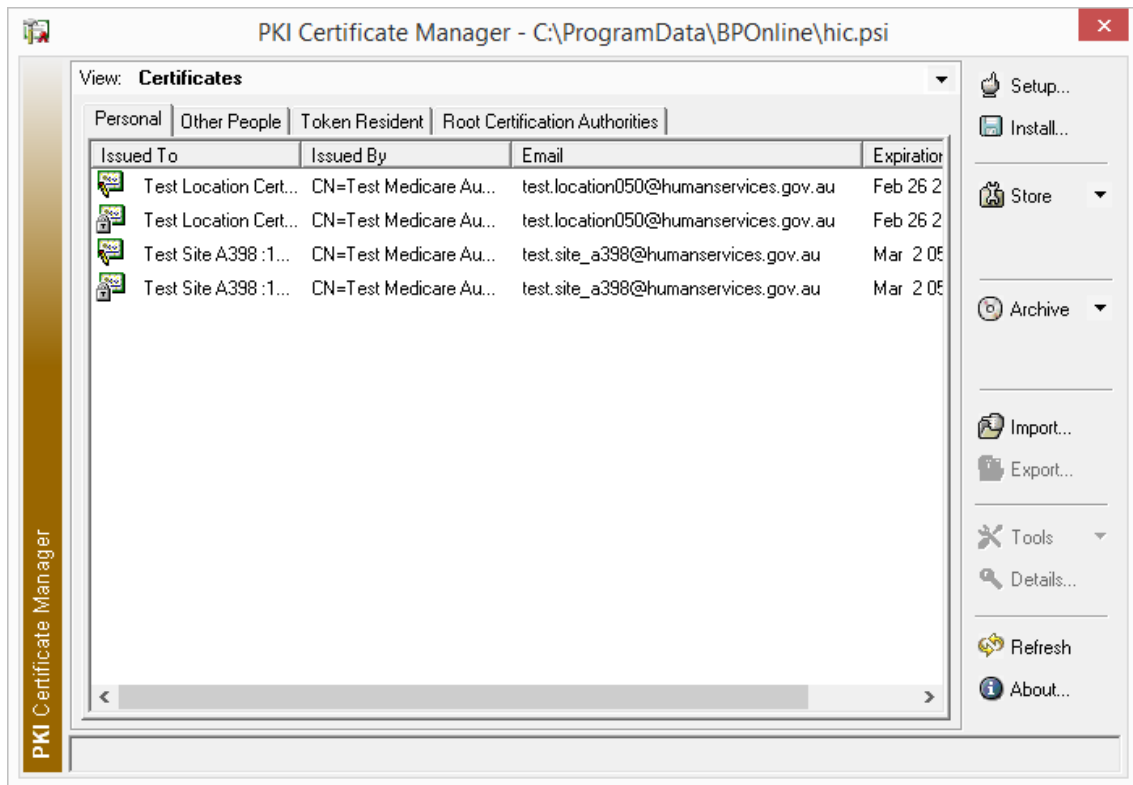
7. Click ... and browse to the folder containing the site certificate for the location you want to add. Select the file **fac_encrypt.p12** and click **Open**. Click **Next**.



8. Enter the PIC password for the location's site certificate. Click **Next**. The certificate will be displayed ready for import.



9. Click **Finish** to import the **fac_encrypt.p12** certificate into the **PKI Certificate Manager** screen.
10. Repeat steps 5—9, but select the file **fac_sign.p12**. Both certificates should be imported into the **PKI Certificate Manager** screen.

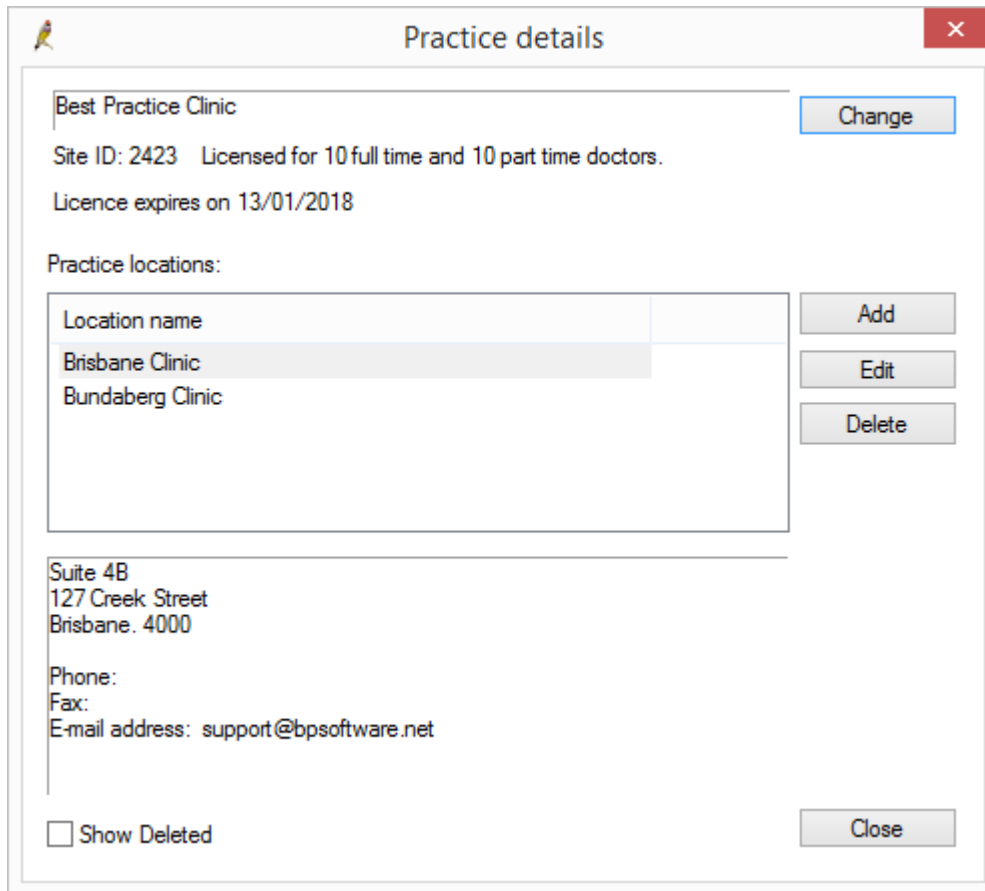


11. Repeat steps 5—10 for each practice location you want to configure Medicare Online for. You will need to import the **fac_encrypt.p12** and **fac_sign.p12** files for each location.
12. Record the value in the **Email** column for each certificate pair shown in the **PKI Certificate Manager** screen. You will need to enter associated email addresses in **5. Assign certificates to practice locations below**.
13. Close the PKI Certificate Manager.

5. ASSIGN CERTIFICATES TO PRACTICE LOCATIONS

To handle online claiming, Bp Premier must know which certificates are associated with which practice locations.

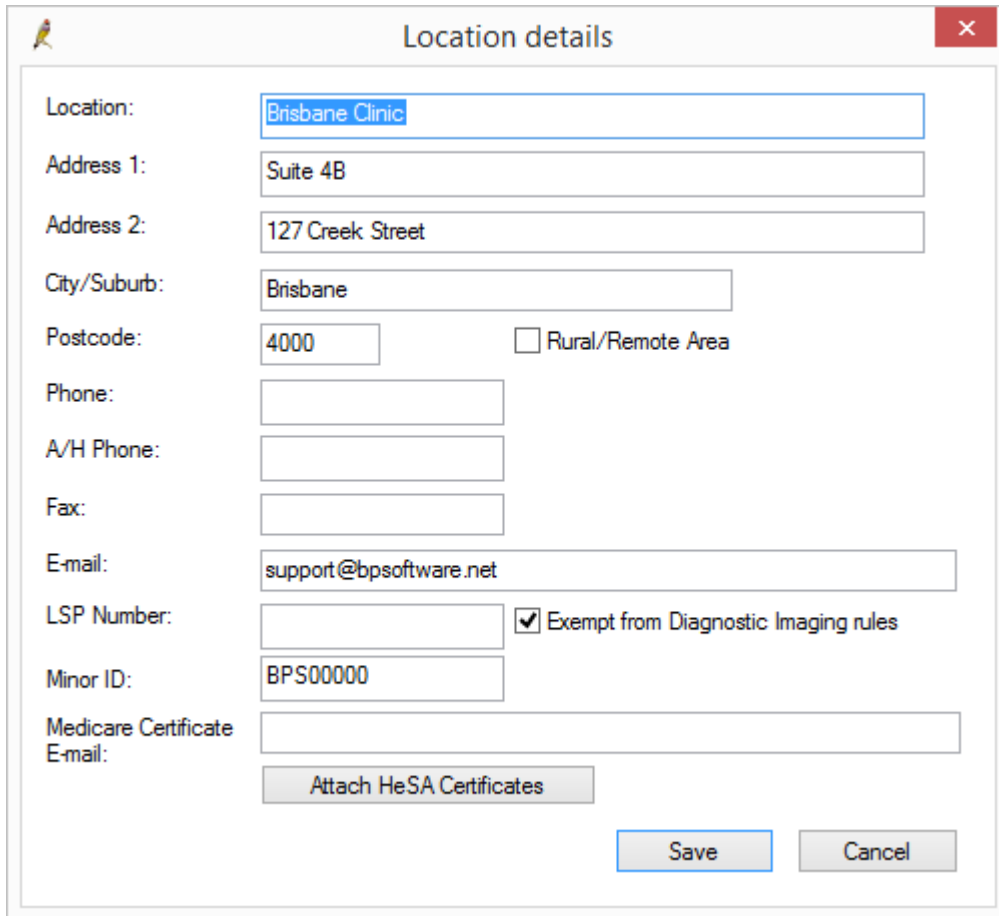
1. Select **Setup > Practice Details**. The **Practice Details** screen will open.



The screenshot shows a window titled "Practice details" with a close button (X) in the top right corner. Inside the window, there is a text input field containing "Best Practice Clinic" with a "Change" button to its right. Below this, it says "Site ID: 2423 Licensed for 10 full time and 10 part time doctors." and "Licence expires on 13/01/2018". Under the heading "Practice locations:", there is a table with two columns: "Location name" and an empty column. The table contains two rows: "Brisbane Clinic" and "Bundaberg Clinic". To the right of the table are three buttons: "Add", "Edit", and "Delete". Below the table, there is a text input field containing "Suite 4B", "127 Creek Street", and "Brisbane. 4000". Below this, it says "Phone:", "Fax:", and "E-mail address: support@bpsoftware.net". At the bottom left, there is a checkbox labeled "Show Deleted". At the bottom right, there is a "Close" button.

Location name	
Brisbane Clinic	
Bundaberg Clinic	

2. Select the first location in the **Practice Locations** list and click **Edit**. The **Location Details** screen will appear.



Location details

Location:

Address 1:

Address 2:

City/Suburb:

Postcode: ☐ Rural/Remote Area

Phone:

A/H Phone:

Fax:

E-mail:

LSP Number: ☒ Exempt from Diagnostic Imaging rules

Minor ID:

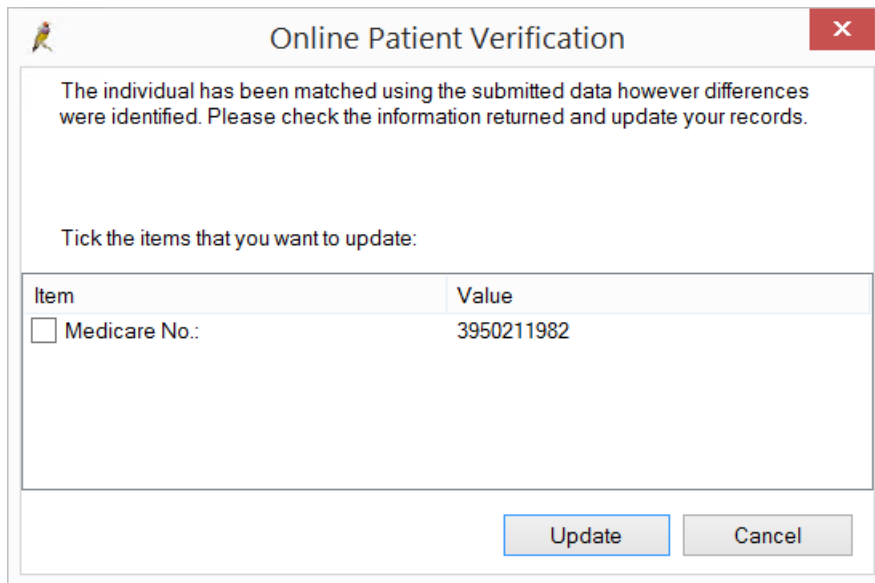
Medicare Certificate E-mail:

3. Enter the **Minor ID** for the location.
4. Enter the **Medicare Certificate E-mail** for the location. The associated email for a certificate can be found in the PKI Certificate Manager.
5. Click **Save**.
6. Repeat steps 2—5 for each practice location.

6. TEST THE LINK TO MEDICARE ON THE SERVER

Before sending your first batch, Best Practice Software recommend that you test the link to Medicare for each location.

1. Log in to the Bp Premier server and select the first **Location** from the **Login** screen. Click **Login** to continue logging in.
2. From the main screen of Bp Premier, select **View > Patients**. The **Patient list** screen will appear. Enter a surname or part to **Search for**.
3. Select a patient name and click **View details**. The **Edit patient** screen will appear.
4. Click **Medicare / DVA eligibility check** at the bottom of the screen. This will contact Medicare and check whether the **Medicare No.** is valid for this patient. If the communication is working correctly, Bp Premier will display a message similar to the one below.



Online Patient Verification

The individual has been matched using the submitted data however differences were identified. Please check the information returned and update your records.

Tick the items that you want to update:

Item	Value
<input type="checkbox"/> Medicare No.:	3950211982

Update **Cancel**

5. If the test is successful, exit the **Edit patient** screen and perform the test from step 1 for each practice location.

If the test is not successful, contact Best Practice Software Support to diagnose the problem.

7. CONFIGURE ALL WORKSTATIONS

I have already set up Medicare Online claiming for one practice location

If you have already configured Bp Premier for online claiming, and just added site certificates for new practice locations, perform **6. Test the link to Medicare on the server on the previous page** on each workstation to test connectivity to Medicare.

If each location connects to Medicare on each workstation, setup is complete.

This is the first time I am setting up Online Claiming for Bp Premier

1. Exit from Bp Premier on the server.
2. Browse to the folder C:\ProgramData\BPOnline on the server and share the folder across the network.
3. Give all Windows users who access Bp Premier 'full control' permissions to the folder and its contents.
4. Browse to the file HIC.psi, right-click and select **Properties > Security** tab. Ensure that all users have 'full control' permission to this file.

Note: Your practice's IT support can help if you are unsure how to share folders and change access permissions.

5. Go to the first workstation.

From the main menu, click **Help > About** and check that the **Build No.** shows '1.8.6.759' or higher and the **Version** shows 'Lava Service Pack 1'. Check the folder C:\ProgramData\BPOne exists on that workstation.

If this folder is not found on the workstation, reapply the program upgrade for the version of Bp Premier on this workstation. When you reach the **Online Claiming** installation screen, tick **Install the Best Practice Software Online Claiming module**.

6. Log in to Bp Premier on the workstation.
7. Select **Setup > Configuration** from the main screen. Select the **Online claiming** tab.
8. Tick **Activate Online Bulk Bill Claiming**, **Activate Online Private Patient Claiming**, or both, depending on the online claiming services your practice offers.
9. Set the **Location Name** to your practice's Main Surgery and the **Location code** for your practice is correct.
10. Beside **Path to certificate store**, click **Change** and either type in the UNC path to the certificate store on the server (for example, '\\servername\BPOne') or browse to this folder and click **Save**.
11. Click **Check certificate expiry**. If sharing has been set up correctly for the certificate store, Bp Premier will display the certificates and their expiry dates.
12. Follow the steps outlined in [6. Test the link to Medicare on the server on page 42](#) to confirm that the workstation can communicate to Medicare.
13. Repeat steps 5—12 on all workstations on the network.

Best Practice Software recommend that you create an online batch with just a few transactions and transmit this as a test. If the text batch is successful, you can create larger batches for transmission.

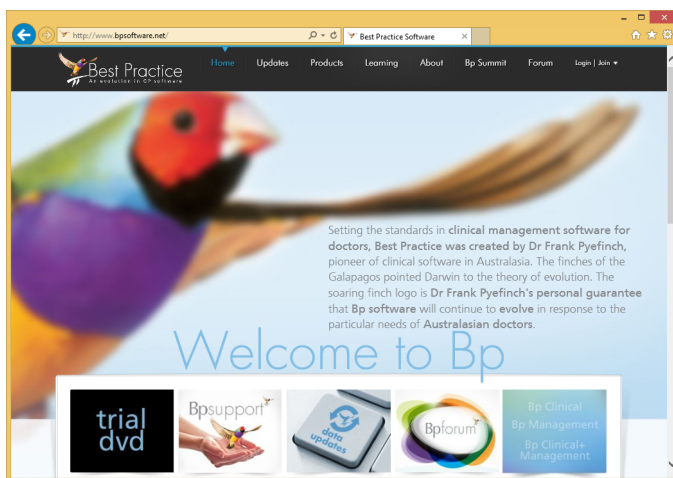
Downloading Bp Premier Lava SP1 update from the website



Tip: . To check the program and drug database version you are currently using, log in to Bp Premier on each machine and select **Help > About** from the main screen.

DOWNLOAD THE PROGRAM UPDATE


1. Log on to the computer as a Windows user with **Administrator Rights**.
2. Open your internet browser and enter the address www.bpssoftware.net. You will be directed to the Best Practice Software home page.



3. Click on the **Updates > Program update** heading. You will be directed to the **Bp Program Update** page showing the link to the **Lava Service Pack 1 - 1.8.6.801** edition of Bp Premier.

Bp Program Update

Best Practice Software recommends users regularly update their program version of **Best Practice**.
The latest program version of **Best Practice** available is:



Lava Service Pack 1

For a full list of changes within this version, refer to [Lava Service Pack 1 release notes](#). (Pdf Version)

Before you perform the Program Update, you require:

- Please ensure you have read the **Lava Upgrade Checklist** prior to proceeding.
- **Best Practice version 1.8.4.642** or higher and the **February 2017 Data Update** or higher.
- Windows XP SP3 or higher (*NOTE: Version 1.8.4.642 upgrade cannot be installed on Windows 2000 or earlier*)
- NET Framework 4 (installs automatically if not present, however will require a reboot of the PC)

NOTE: If .NET 4 is not already installed on your Server a reboot is required, therefore the update cannot be performed while Best Practice is in use. In this case, all users will need to log out of Best Practice until the upgrade is complete on the server.

If you are unfamiliar with applying **Best Practice** updates, the following [Knowledge base article](#) explains how to download an update from this site.

- [Lava Service Pack 1 install and upgrade](#)
- [Lava Service Pack 1 known issues](#)

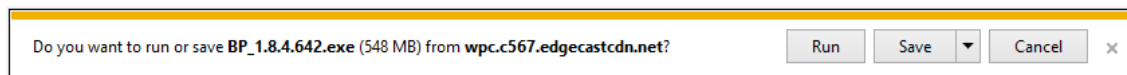
4. Read this page carefully to ensure that you have performed all the required preparations and have the required prerequisites to perform the program update.

5. Once you have performed the preparations, complete the user details at the bottom of the screen. Type in your BPS Site ID and your email address and click the **Login** button. The button will change to **Download**.
6. Click the **Download** button to commence the download. The download process will differ slightly according to the internet browser you are using. Follow the instructions for your browser below.

***Note:** The upgrade file will be called **BP_1.8.6.801.exe**. The example screenshots below may show a different version number.*

MICROSOFT INTERNET EXPLORER

A dialog box will appear (similar to the example shown) and you will be prompted to either **Run** or **Save**.



DO NOT SELECT RUN as this will attempt to run the update over the internet.

Press the **Save** button to save the update utility.

- In newer operating systems, the file will be downloaded to your **downloads** folder. If you want to save the file to a different folder, press the arrow to the right of the **Save** button, select **Save as**, and browse to the folder you wish to save it in.
- In older operating systems, the browser will download to the last folder used. If you want to save the file to a different folder, press the **Save** button and browse to the folder you wish to save it in.

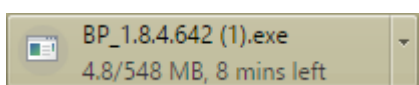
Once downloaded, a dialog box will appear confirming the filename and that the download has completed.



- To run the update immediately, and you have read all the documentation on applying the program update, press the **Run** button.
- To run later, press the **Open folder** button and take a note of which folder the file has been saved in, so you can come back to it later.

GOOGLE CHROME

A dialog box will appear towards the bottom of the screen and you will see the progress of the file being downloaded.

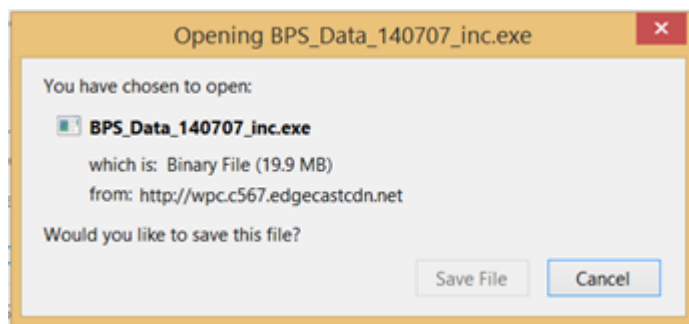


Once downloaded, the progress display will disappear and the icon will change colour.

- To run the update immediately, and you have read all the documentation on applying the program update, left-click on the down arrow to the right of the dialog box and select **Open**.
- To run later, select **Show in folder** and take a note of which folder the file has been saved in, so you can come back to it later.

MOZILLA FIREFOX

A dialog box will appear to show the file to be downloaded.



Press the **Save file** button. The download will commence.

While the file is downloading, an arrow will appear in the right-hand corner. When finished, the arrow will disappear. The downloaded file will be found in your **downloads** folder. Either browse to this folder and run the update or return and run the update at a later time.

TO RUN THE UPDATE AT A LATER STAGE

If you have not opted to run the update immediately, when you are ready to run the update, find the downloaded file in the folder you identified above and double-click on the file.

The file will be called **BP_1.8.6.801.exe**. If you have downloaded previous program updates, make sure you select the correct file for the version you wish to upgrade to.

See **Upgrading from the Lava Service Pack 1 installation DVD on the next page** for instructions on installing the Bp Premier Lava SP1 update.

Upgrading from the Lava Service Pack 1 installation DVD

These instructions provide the information required to upgrade your existing version of Best Practice to Bp PremierLava Service Pack 1 (SP1) using the Lava SP1 installation DVD.



Tip: To check the program and drug database version you are currently using, log into Bp Premier on each machine and select **Help > About** from the main screen.

BEFORE YOU START THE UPDATE



Important: Ensure that you are logged on to each computer you are upgrading as the Administrator.

Back up the database and successfully test a restore from the backup before upgrading.

SERVER: Program updates often change database tables used by the program. While this is being done, performance could be affected on all workstations on the network. Best Practice software therefore recommends updating the server outside of business hours or when the server is not under load. A server update would usually take between 20 – 60 minutes to apply.

TERMINAL SERVER: If your practice runs Bp Premier on a terminal server, log ALL users out of Bp Premier before starting the update.

WORKSTATION: After applying successfully to the server, the upgrade can be applied to each workstation. The update should only take a few minutes. While upgrading workstations, Bp Premier can be used on other computers on the network. Performance should not be affected.

LAPTOPS: Ensure that all laptops which use the **Remote database** function have synchronised their data to the server before upgrading the server. Upgrade the laptop workstation afterwards.

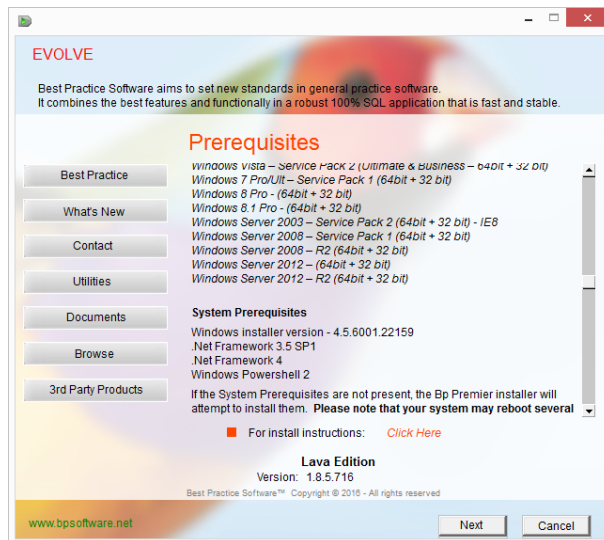
If you are not sure about any of the above items, contact your IT support technician for advice and assistance.



Important: Ensure that you have your system meets the Operating System and SQL database versions supported as described in the Bp Premier Lava System Requirements.

RUN THE PROGRAM UPDATE FROM THE DVD

Your practice name and program version will be different to the example screenshots provided below.



Upgrade the Bp Premier Server first, then all workstations

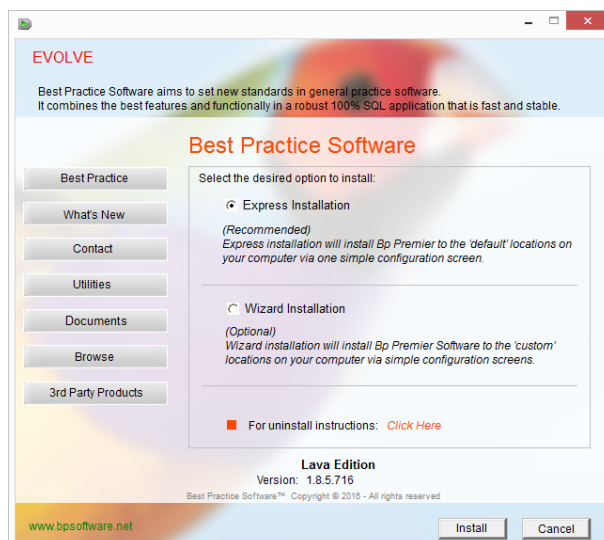
Log on to the computer as the **Administrator**.

Insert the **DVD**. The installer should begin automatically. If not, select **Start > Run** and type **X:\setup**, where X is your DVD drive letter.

The **Best Practice Prerequisites** screen will appear. Confirm that you have the **prerequisites** required.

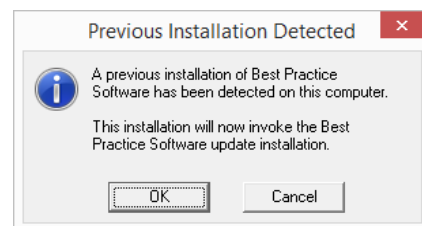
Check that the version at the bottom of the screen reflects the new version.

Click **Next**.

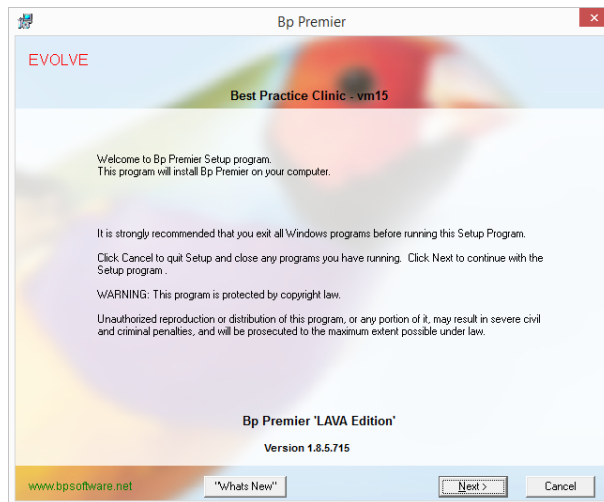


Select the **Express installation** and click **Install**.

The installer will detect that you have a current version of Best Practice and prompt you to Update.

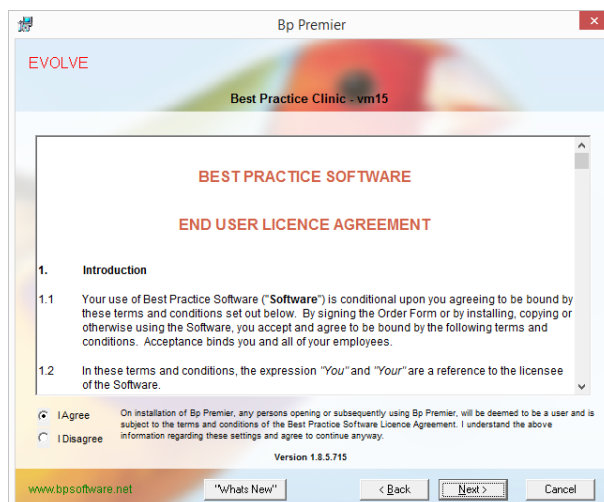


Click **OK** to continue.



The **Bp Premier Program Files** screen will appear showing the version to be installed.

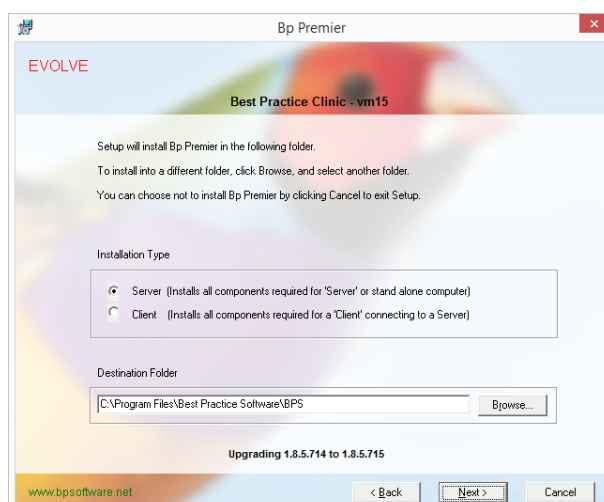
Ensure that this is the intended version and click **Next**.



The Best Practice Software End User Licence Agreement will be displayed. This has recently been changed, so please ensure that you have read this document carefully.

If you agree with the terms and conditions, select **I agree** and click **Next**.

If you do not agree with the terms and conditions, select **I Disagree** and **cancel** to exit the update process.

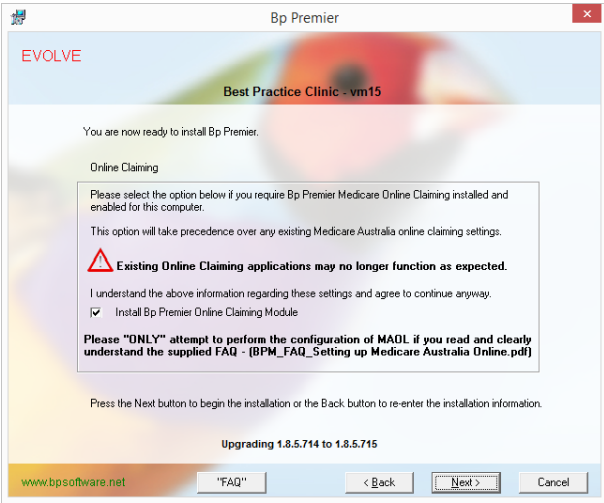
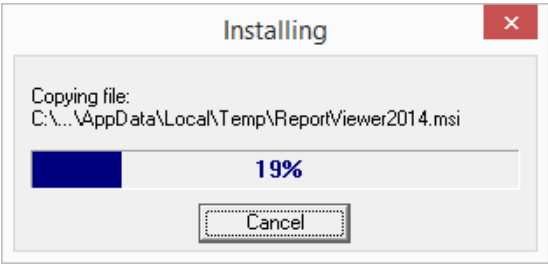
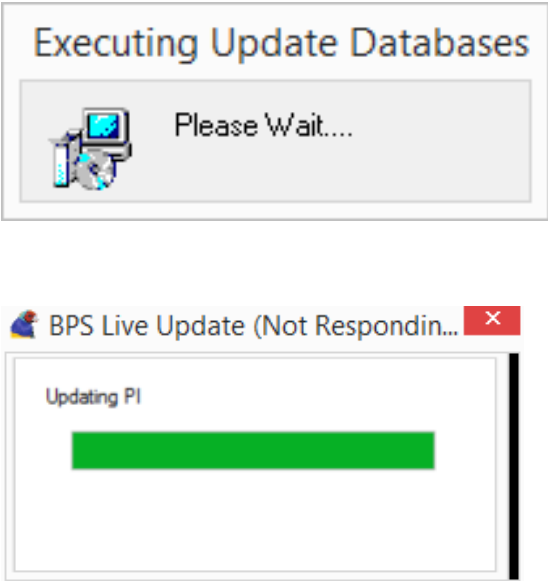


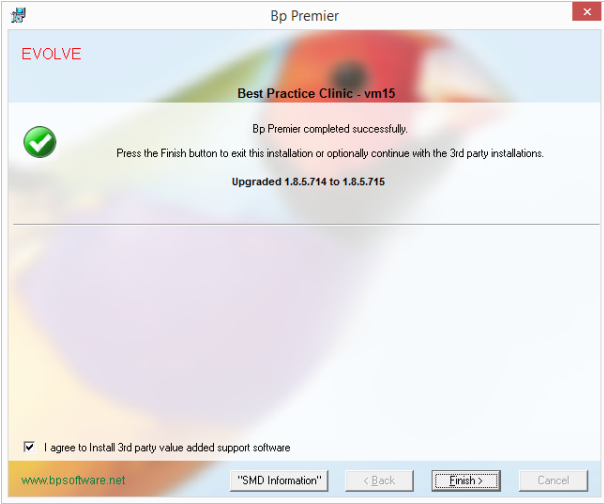
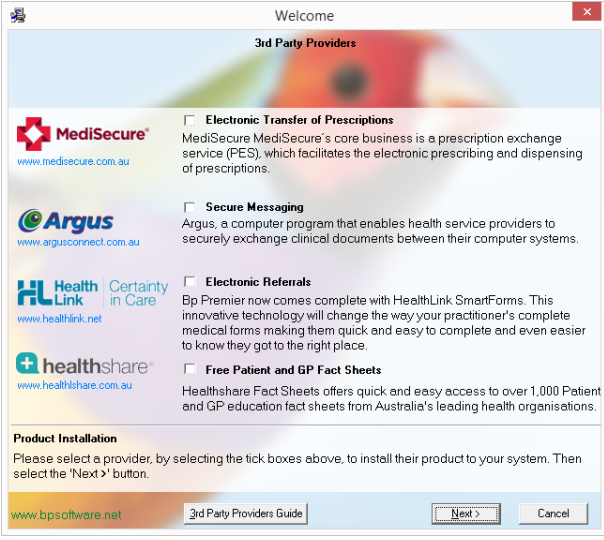
The update will automatically detect a 'Server' or 'Client' installation and select the correct radio button.

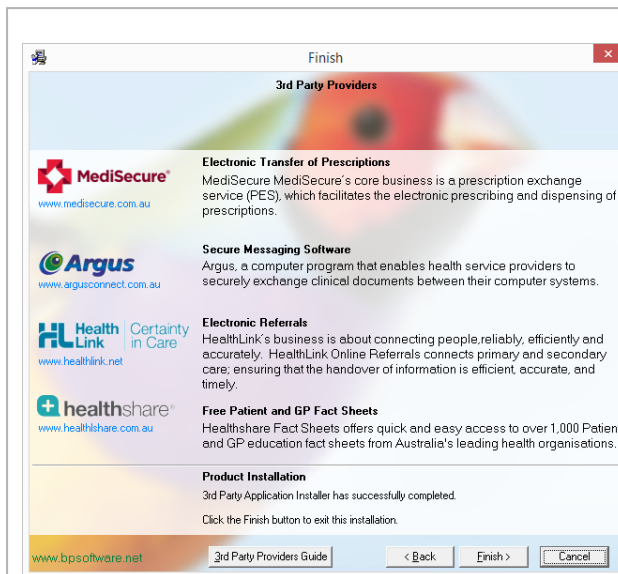
Do not change this setting.

You do not need to change the **Destination Folder**. The Bp Premier update will automatically set this for you.

Click **Next**.

 <p>The screenshot shows the 'Bp Premier' installation window. It has a title bar with a close button. The main content area has a blue header with 'EVOLVE' and 'Best Practice Clinic - vm15'. Below this, it says 'You are now ready to install Bp Premier.' and 'Online Claiming'. A text box contains instructions: 'Please select the option below if you require Bp Premier Medicare Online Claiming installed and enabled for this computer. This option will take precedence over any existing Medicare Australia online claiming settings. Existing Online Claiming applications may no longer function as expected. I understand the above information regarding these settings and agree to continue anyway. [X] Install Bp Premier Online Claiming Module. Please "ONLY" attempt to perform the configuration of MAOL if you read and clearly understand the supplied FAQ - (BPM_FAQ_Setting up Medicare Australia Online.pdf)'. At the bottom, it says 'Press the Next button to begin the installation or the Back button to re-enter the installation information.' and 'Upgrading 1.8.5.714 to 1.8.5.715'. There are buttons for 'FAQ', '< Back', 'Next >', and 'Cancel'.</p>	<p>The next screen displayed will be the Online Claiming installation option.</p> <p>Tick this box if you wish to use Medicare Online on this machine and you do not currently use Medicare Online from another application (such as another practice management software).</p> <p>Click on the FAQ button to view details on setting up Medicare Online.</p> <p>Click Next.</p>
 <p>The screenshot shows a standard Windows installation progress window. The title bar says 'Installing'. The main text says 'Copying file: C:\...\AppData\Local\Temp\ReportViewer2014.msi'. Below this is a progress bar that is partially filled with blue, and the text '19%' is displayed. There is a 'Cancel' button at the bottom.</p>	<p>The Bp Premier update will back up your program files as a precautionary measure in the event you need to roll back to the existing version.</p> <p>The installation will begin.</p>
 <p>The screenshot shows two separate windows. The top window is titled 'Executing Update Databases' and has a 'Please Wait...' message with a small icon of a computer and a database. The bottom window is titled 'BPS Live Update (Not Responding...)' and has a progress bar that is partially filled with green, with the text 'Updating PI' above it.</p>	<p>If upgrading the server:</p> <p>At the end of the program update, the Update Database function will run to update and check the database structure.</p> <p>When Update Database is complete, if the drug database is older than the one bundled in the program update, the Live update function will run to update the drug database.</p> <p>This entire process will take some time, depending on the database size and server resources.</p>
<div data-bbox="204 1861 260 1917" data-label="Image"></div> <p>Important: If your practice uses HealthLink and you have not already upgraded to Bp Premier Lava, the installer will open port 8080 in Windows firewall on the server machine as part of HealthLink configuration. Please make your IT technician aware of this so that any necessary actions can be performed.</p>	

	<p>When the update is complete, the Completed successfully screen will be displayed.</p> <p>The checkbox at the bottom will install or upgrade some 3rd party software. This includes MediSecure, Argus, and HealthLink.</p> <ul style="list-style-type: none"> ■ If you do not want to install or upgrade any of these 3rd party products, untick the checkbox and click Finish. The upgrade will complete. ■ To install or update any of these 3rd party products, tick the checkbox and click Finish to display the 3rd Party Providers screen.
	<p>Tick the checkboxes to install or upgrade the listed 3rd party products. Click Next. The installer will install or upgrade the components.</p> <p>Refer to the following documents or search in the Bp Premier online Knowledge Base for information on how to install / use these applications:</p> <ul style="list-style-type: none"> ■ Installing Argus ■ Configuring MediSecure ■ Accessing HealthLink Online forms ■ Accessing Healthshare fact sheets. <p>If a current version of MediSecure ePrescribing software is already detected on the server and is an older version, the MediSecure checkbox will be ticked automatically.</p>



When the installation of the 3rd party products is complete, the **Finish** screen will appear.

Click **Finish** to close the screen and exit the upgrade utility.

