

Bp Premier Guide to Linking to PracSoft

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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	
www.bpssoftware.net	

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

Linking Bp Premier to PracSoft

Bp Premier supports linking to PracSoft 3 and higher.

A practice can use Bp Premier for recording clinical data only and use the PracSoft billing package for the appointment book, billing, and other management functionality. This approach maintains your patient demographics in the billing package but synchronises changes with Bp Premier.

You can link to PracSoft in two ways:

- One-way linking — Transfers demographic data from PracSoft to Bp Premier only
- Two-way linking — Transfers demographic data from PracSoft to Bp Premier and from Bp Premier to PracSoft. Two-way linking also allows transfer of visit item codes and immunisation data.

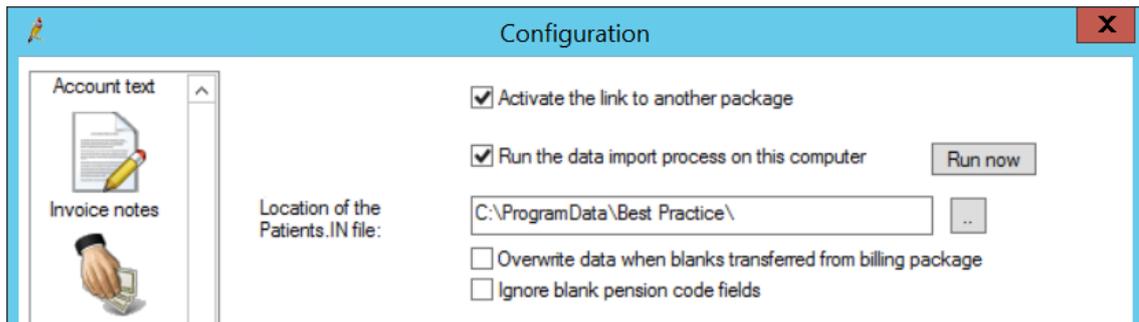
You can transfer different types of information based on the linking type:

One-way	Two-way	Data transferred	File name used
✓	✓	Transfer demographic changes made in PracSoft to Bp Premier.	PATIENTS.IN
✗	✓	Transfer demographic changes in Bp Premier to PracSoft.	TRANSFER.OUT
✗	✓	Transfer details of chargeable Item Numbers to PracSoft to allow for account to be created	VISITS.OUT
✗	✓	Transfer details of childhood immunisation records to PracSoft to be sent to the AIR register	IMM.OUT

SETTING UP ONE-WAY LINKING

To configure Bp Premier:

1. Create a folder on the Bp Premier server called something like 'BPLinkfiles'. Share this folder so that all users on the network have read and write permissions.
2. On the server, select **Setup > Configuration > Links** from the main Bp Premier screen.



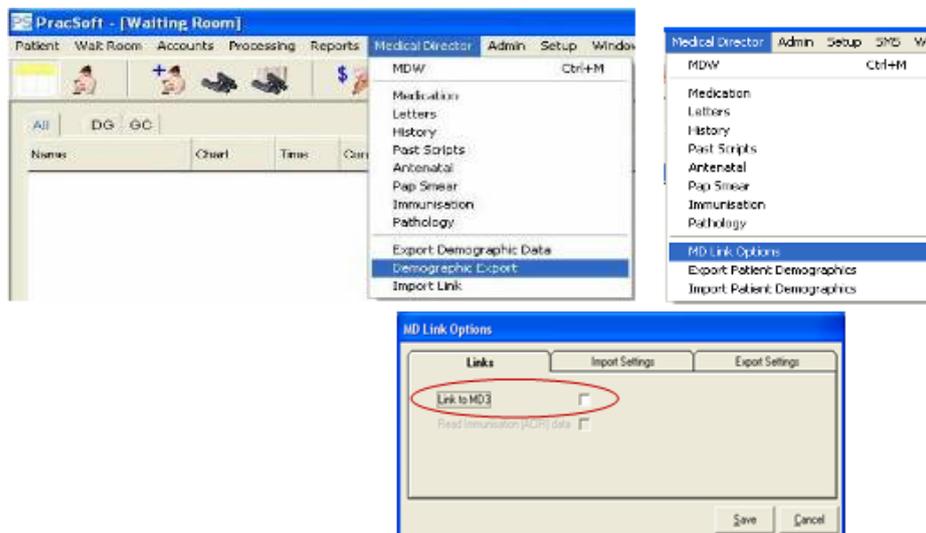
3. Tick **Activate the link to another package**
4. Tick **Run the data import process on this computer**.
5. In **Location of the Patients.IN file**, enter the path to the folder that you created in step 1, for example, 'C:\BPLinkfiles'.
6. Start the BPLink.exe program. See **Configuring Bp Link** in the Bp Premier Knowledge Base for more information.

To configure PracSoft:

Complete the following instructions on each PracSoft workstation.

1. From the PracSoft **Waiting Room** screen, select either:
 - **Medical director > MD Link Options**
 - **Medical director > Demographic export**

depending upon your version of PracSoft.



2. If you are using Medical Director 3, on the **Links** tab, untick **Link to MD3**.
3. Select the **Export settings** tab.
4. Tick **Export patient demographics** or **Export folder**, depending on PracSoft version, and browse to the shared folder on the Bp Premier server that you created, for example, '\\server-

name\BPLinkfiles\'.
5. Test the link using the examples in **Loading BP Link and testing the Link on page 8**.

Configuring two-way linking requires you to set up the four types of transferring data individually.

TRANSFERRING DEMOGRAPHICS CHANGES FROM PRACSOFT TO BP PREMIER

To set up transfer of demographics changes from PracSoft to Bp Premier, follow the instructions for one-way linking in the section above.

TRANSFERRING DEMOGRAPHICS CHANGES FROM BP PREMIER TO PRACSOFT

To configure Bp Premier:

Complete the following instructions on the Bp Premier server and all workstations.

1. Select **Setup > Configuration > Links** from the main Bp Premier screen.
2. Tick **Transfer changed demographic data back to the billing package**. This option sends changes made to the patient demographic details in Bp Premier back to PracSoft via the Transfer.out file.
3. Enter the path to the folder on the Bp Premier server that you created earlier, for example, 'C:\BPLinkfiles'.

Transfer changed demographic data back to the billing package

Location of the Transfer.OUT file: 



Tip: The local path on the Bp Premier server will resemble 'C:\BPLinkfiles', but paths on workstations will be the UNC path, for example '\\servername\BPLinkfiles'.

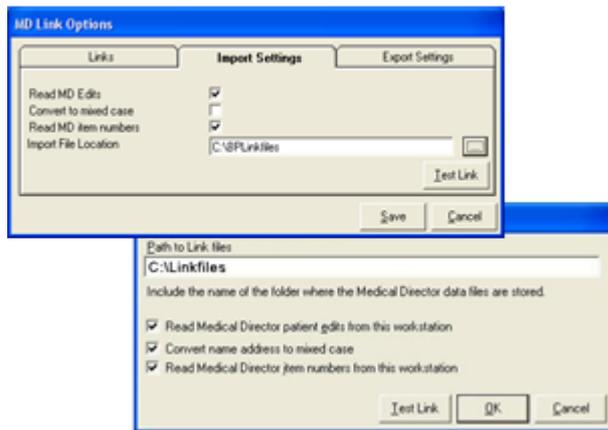
To configure PracSoft:

Perform the following instructions on the PracSoft server only.

1. From the PracSoft **Waiting Room** screen, select either:
 - **Medical director > MD Link Options > Import Settings**
 - **Medical director > Import link**

depending upon your version of PracSoft.

2. Tick **Read MD Edits** or **Read Medical director patient edits from this workstation**, depending upon your version of PracSoft.



3. Enter the UNC path to the folder on the Bp Premier server that you created earlier, for example, '\\servername\BPLinkfiles'.

TRANSFERRING VISIT DETAILS FROM BP PREMIER TO PRACSOFT

To configure Bp Premier:

Complete the following instructions on the Bp Premier server and all workstations.

1. Select **Setup > Configuration > Links** from the main Bp Premier screen.
2. Tick **Transfer visit details back to the billing package**. This option sends Medicare item numbers to PracSoft via the **visits.out** file.



3. Enter the path to the folder on the Bp Premier server that you created earlier, for example, 'C:\BPLinkfiles'.



Tip: The local path on the Bp Premier server will resemble 'C:\BPLinkfiles', but paths on workstations will be the UNC path, for example '\\servername\BPLinkfiles'.

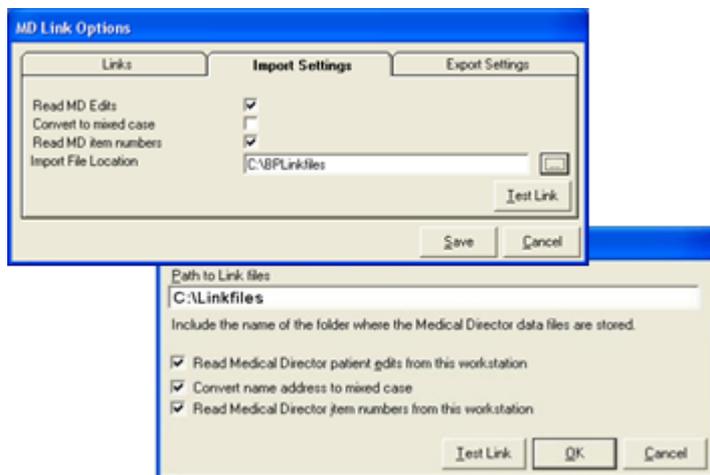
To configure PracSoft:

Perform the following instructions on the PracSoft server only.

1. From the PracSoft **Waiting Room** screen, select either:
 - **Medical director > MD Link Options > Import Settings**
 - **Medical director > Import link**

depending upon your version of PracSoft.

2. Tick **Read MD Item numbers** or **Read Medical director Item numbers from this workstation**, depending upon your version of PracSoft.



3. Enter the UNC path to the folder on the Bp Premier server that you created earlier, for example, '\\servername\BPLinkfiles'.

TRANSFERRING IMMUNISATION RECORDS IN BP PREMIER TO PRACSOFT

To configure Bp Premier:

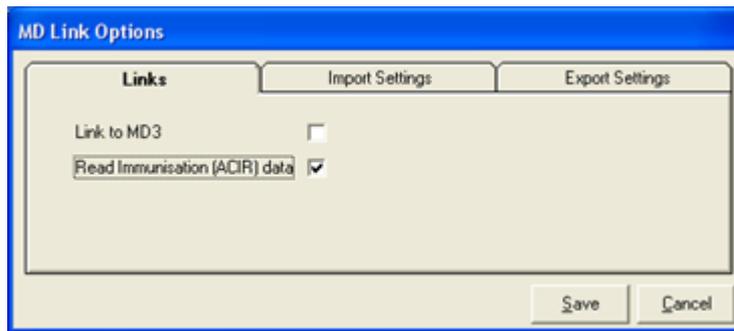
Complete the following instructions on the Bp Premier server and all workstations.

1. Select **Setup > Configuration > Links** from the main Bp Premier screen.
2. Tick **Transfer immunisation data back to the billing package**. This option sends immunisation records to PracSoft via the **Imm.out** file.
3. Enter the path to the folder on the Bp Premier server that you created earlier, for example, 'C:\BPLinkfiles'.
4. Tick **Use PracSoft format for immunisation data transfer**.

To configure PracSoft:

Perform the following instructions on the PracSoft server only.

1. From the PracSoft **Waiting Room** screen, select either:
 - **Medical director > MD Link Options > Links**
 - **Medical director > Links**depending upon your version of PracSoft.
2. Tick **Read Immunisation (AIR) data**.



3. Click **Save**.

LOADING BP LINK AND TESTING THE LINK

If you are transferring data between Bp Premier and a billing package, Best Practice Software recommends loading BP Link automatically when starting the Bp Premier server .

On the Bp Premier server, select **Setup > Configuration > Links** and tick the option **Load BP Link on startup** to restart BP link automatically if the server is restarted.

Make sure that BP Link is running on the server. See **Configuring Bp Link** in the Bp Premier Knowledge Base for more information.

Test transfer of demographic changes from Bp Premier to PracSoft

1. On the Bp Premier server, change the demographics of one patient. Change something insignificant, such as changing 'Street' to 'St' or similar. Save the changes.
2. Open PracSoft and check that the demographic change has been reflected.
3. Repeat this test on at least one other Bp Premier workstation to ensure process is working.

Test transfer of visit Information from Bp Premier to PracSoft

1. Open PracSoft and add a test patient into the Waiting Room. Open the patient in Bp Premier using the MD button. Enter some test notes and click **Finalise Visit**. Enter the **Item Numbers** that you want to charge the patient. Save and close the patient record.
2. Return to PracSoft and check that the item numbers are showing against the patient record, ready to be invoiced.

Test transfer of Immunisation records from Bp Premier to PracSoft

1. In Bp Premier, open a patient record for a child who is under 5 years old. Click on the Immunisation section and record an immunisation for that child. Save and exit the record.
2. Open PracSoft and run the process to import the immunisation batch.
3. If the immunisation was a test, delete the item from the immunisation batch, but if it is a real immunisation, you should have the option to transmit the batch immediately or at a later stage.

Transferring patient demographics from Bp Premier to PracSoft

If your practice uses Bp Premier Clinical and uses PracSoft for Management and billing, you can export the entire set of demographic data from Bp Premier and import the data into PracSoft. The process below describes how to export demographic data and create a link that allows patients in the PracSoft Waiting room to be opened in Best Practice.

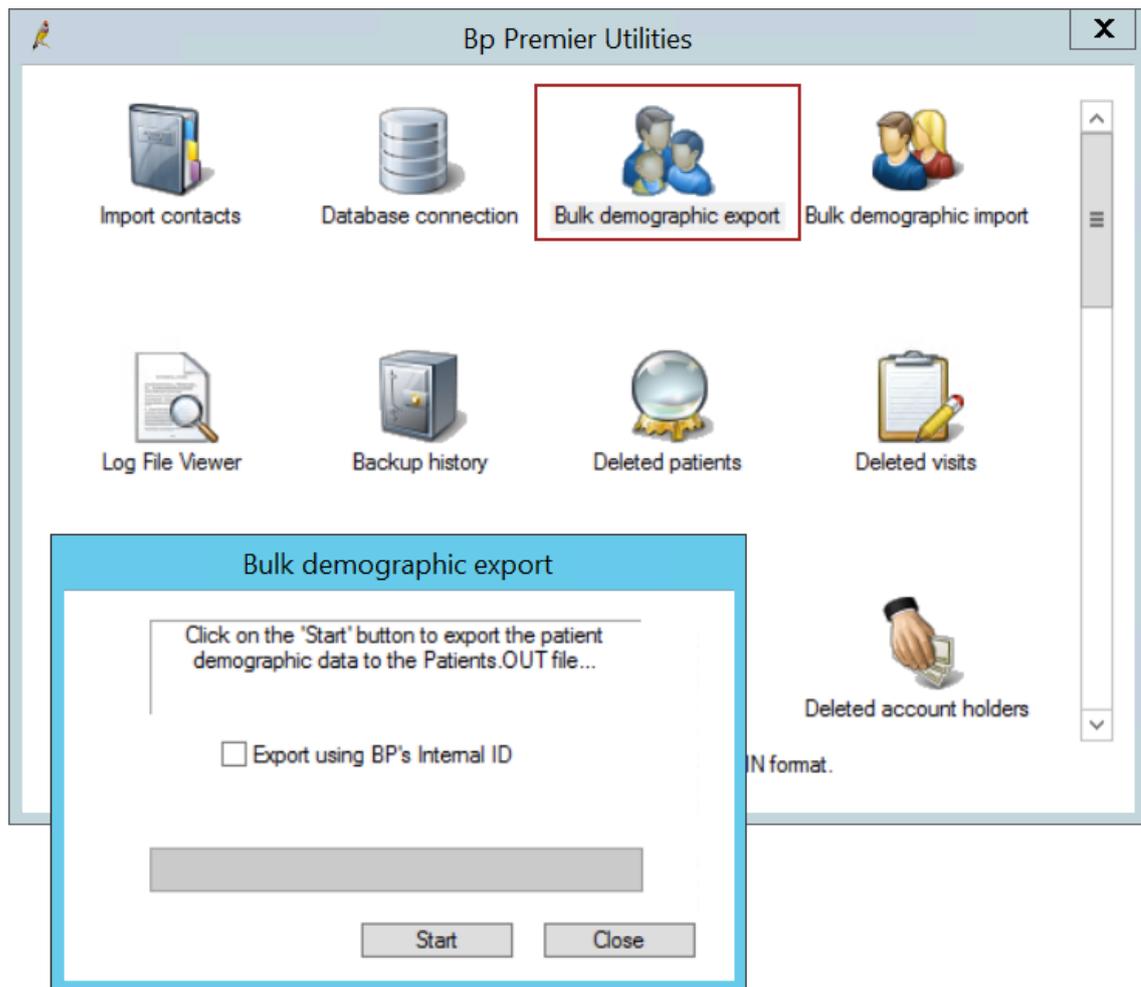
This procedure is best performed on an empty PracSoft database after a PracSoft installation, but can be performed at any time if both databases have been backed up for recovery if necessary.

Before you begin, you need to:

- Contact Best Practice Support and obtain the utility **Set ExternalID.exe**. Support can email you this utility.
- Back up the Bp Premier database and ensure the backup can be restored (for example, on a test BP server).
- Back up the PracSoft database, if the database is not empty.
- Set the user permission **Export demographic data** to 'Allow access' for the user performing the export.
- Set the folder C:\Program Files\Best Practice Software\BPS on the Bp Premier server to 'shared'.

Export patient demographics

1. On the Bp Premier server, copy the utility **Set ExternalID.EXE** obtained from Best Practice into the folder C:\Program Files\Best Practice Software\BPS.
2. Browse to this folder and double-click the file. The utility will update the patient database in Bp Premier to set the External ID number.
3. From the Windows desktop, go to **Start > Applications > Best Practice Software**. Double-click **BPS Utilities**.
4. Enter a username and password at the **Login** screen and click **OK**.



5. Click **Bulk demographic export**.
6. Tick **Export using BP's Internal ID** and click **Start**.
7. Choose a location for the patients file to be created in. After completion, a popup will alert that the demographics have been successfully exported.
8. Browse to the location you selected in step 7 and rename the file from 'Patients.out' to 'Patients.in'.

Import Patient Demographics into PracSoft

9. On the PracSoft server, go to **Start > Programs > HCN maintenance tool**. Double-click the **Import /Export Utility**.
10. Select patient demographics 'Generic Ascii ii' in a Patients.in file format. Browse to the folder you saved the Patients.in file in step 7 and select the file. It may take a few minutes depending upon the number of patients.
11. Test patient linking by adding a patient to the appointment book in PracSoft and clicking **Open MD**. The patient record should open in Bp Premier. Check that if you edit an existing patient's demographic details in PracSoft, the changes are reflected in Best Practice.
12. As a precaution, delete or move the Patients.in file to another folder to prevent the file being accidentally imported again.

Note: For a complete step by step guide to importing a patients.in file into PracSoft, contact HCN PracSoft support.

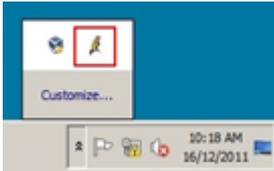
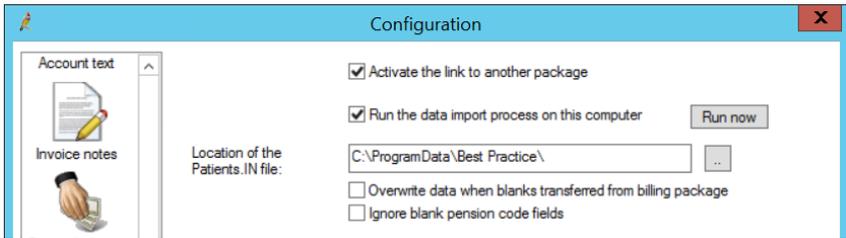
Troubleshooting links to third party billing packages

Customers can link Bp Premier to certain third party billing packages to allow the transfer of demographic data. Occasionally, the link can fail due to various issues. Below are some common causes of link failure and how to resolve them.

Important: *If a patient demographic record has not been transferred from your billing package, do **not** manually enter them into your Bp Premier clinical module before troubleshooting the link. Manual entry often leads to duplicated files with separate data, which requires data re-entry or merging.*



Do not duplicate the patient in the billing package. Any record created in the billing package will need to be paired with a like entry in Bp PremierClinical.

Problem	Solution
<p>BP Link is not running on the server computer</p>	<p>Ensure that the BP Link icon is running in the system tray:</p>  <p>You will not be able to view this correctly while in a remote session. You will need to be on the server console itself to view and run BP Link. For more information, see How do I configure and use Bp Link?</p>
<p>Link options have not been set in Bp Premier.</p>	<p>Ensure that the Location of the Patients.IN field is correct and the folder actually contains a file named 'patients.in'.</p>  <p>The Bp Premier user must have access to the Setup > Configurations menu</p> <p>If there is no patients.in file, refer to your billing package documentation or network administrator to obtain the location of this file.</p>

Problem	Solution
<p>Another clinical package is open (for example, Medical Director) that also has a link to billing package option set. A race for the link file occurs: the first package to access the link file imports the patient demographic change and purges the link file.</p>	<p>Ensure that any legacy clinical packages do not have link to billing package options set.</p> <p>For more information on how to do this, refer to the package's help file, or contact your network administrator.</p>
<p>Another "Link file processor" type utility is running somewhere on the network.</p>	<p>Ensure that any instances of a Link file processor type utility are disabled (including removing any Load at startup options). For more information on how to do this, refer to the package's help file, or contact your network administrator.</p>

Retesting

In the event of another package or a link file utility reading and purging the link file:

1. Check all steps listed above and ensure that all instances of other clinical packages and link file processor type utilities no longer access the link file.
2. Perform a minor change to any patients demographic in the billing package (for example, change "st" to "street"). This should rewrite the demographics to the link file and give Bp Premier the opportunity to read the data.

Third-party transfer files and DDE reference

Bp Premier uses a number of files internally to manage the transfer of information between the Bp database and third-party packages. Understanding the format of these files may assist in troubleshooting linking to Bp Premier. Best Practice Software Support may also ask about these files when providing assistance.

PATIENTS.IN

The patients.in file is a generic ASCII flat file used by Bp Premier to transfer patient demographic data between third-party billing packages and Bp Premier Clinical.

Patients.in contains patient records in a fixed length format. Each line in the file represents a single patient record and consists of a set of character fields in order and terminated with a carriage return/line feed pair (ASCII 13 + ASCII 10).

The file can contain any number of lines.

There are two patients.in formats, depending on the version of Bp Premier in use.

ASCII v2 format

Field	Name	Length	Description
1	UR_NO	9	Unique identifying code for each patient 1
2	TITLE	5	MR, MRS, MS, MISS, MAST, DR, PROF, SIR, LADY
3	SURNAME	30	Patient's surname
4	FIRSTNAME	30	Patient's first names
5	ADDRESS	40	Street address and number
6	CITY	25	City or suburb
7	POSTCODE	4	Postcode
8	DOB	10	Date of birth in format dd/mm/yyyy
9	MC_NO	12	Medicare number
10	MC_INDEX	1	Medicare IRN
11	PENS_NO	14	Pension number
12	DVA NO	14	DVA number
13	H_PHONE	14	Home phone number
14	W_PHONE	14	Work phone number

Field	Name	Length	Description
15	CODE	1	Pension Code - P, R, L or blank ²
16	SEX	1	M, F or blank.
17	S_NET	14	Safety net number
18	RECORD_NO	10	Record number ³
19	LINK_TO	9	UR_NO of Head of Family
20	LINKCODE	1	A = Add U= Update D = Delete

ASCII v3 format

V3 is identical to the ASCII v2 format, with the addition of the following fields:

Field	Name	Length	Description
21	EMAIL	100	Patient's e-mail address
22	REFDOCTOR	50	Referring doctor's name
23	REFDATE	10	Date of referral (dd/mm/yyyy)
24	REFCODE	2	Referral duration code ⁴
25	INSNO	20	Patient's health insurance number
26	INSCO	40	Patient's health insurance provider
27	DECEASED	10	Date of death (dd/mm/yyyy)
28	ATSI	1	Aboriginal or Torres Strait Islander. Y,T, B or blank ⁵
29	MOBILE PHONE	14	Mobile phone number

Notes

Fields are buffered with spaces (ASCII 32).

Blank fields can be contained in each line of text as long as the correct position of all fields is maintained.

1. May contain letters or numbers in character format. Needs to be unique, because the field is used as a key to identify patients and associated clinical details. Should be generated by the system when a new patient record is initiated.

2. P = Pension/HCC holder, R = DVA yellow card holder, L = DVA white card holder.
3. RECORD_NO corresponds to the patient's record in the paper-based files, for example, the RACGP filing system.
4. 00 = Indefinite, 03 = 3 Months, 12 = 12 Months.
5. Y = Aboriginal, T = Torres Strait Islander, B = Both, or left blank.

IMM.OUT

The Imm.out file is used to transfer immunisation data to third-party software packages.

Field	Field size	Description
Patient:ExternalID	9	Patient's ID in external billing package
Patient:SURNAME	30	Patient's surname
Patient:FIRSTNAME	30	Patient's first name
Patient:TITLE	6	Patient's title
Patient:DOB	8	Patient's date of birth in DDMMYYYY
Patient:ATSI	1	'Y' or 'N'
Patient:ADDRESS	40	Patient's street address
Patient:CITY	30	Patient's residential city
Patient:POSTCODE	4	Patient's postcode
Patient:CHART_NO	10	Patient's record number
Patient:PENSIONNUMBER	14	Patient's pension number
Patient:DVANUMBER	14	Patient's DVA number
Patient:MEDICARENO	13	Patient's Medicare number
Patient:MEDICAREINDEX	1	Patient's Medicare IRN (0-9)
Dr:DrName	30	Immunising doctor's name
Dr:ProviderNo	8	Immunising doctor's provider number
Imm:Immdate	10	Date of immunisation
Imm:Type	40	Type of immunisation
HIC Code	6	Not user-supplied. Generated at runtime.

Field	Field size	Description
Imm:Sequence	1	Immunisation sequence number
Imm:Batch	20	Immunisation batch number

TRANSFER.OUT

The Transfer.out file is used to transfer patient data to third-party software packages.

Position	Field name	Description
1	UR_NO	Patient identifier
2	TITLE	Patient's title
3	SURNAME	Patient's surname
4	FIRSTNAME	Patient's first name
5	ADDRESS	Patient's street address
6	CITY	Patient's residential city
7	POSTCODE	Patient's postcode
8	DOB	Patient's date of birth in DD/MM/YYYY
9	MC_NO	Patient's Medicare number
10	MC_INDEX	Patient's Medicare IRN (0-9)
11	PENS_NO	Pension number
12	DVA_NO	DVA number
13	PHONE	Patient's home phone number
14	BUS_PHONE	Patient's business phone number
15	PENSCODE	Pension code: P = Pension/HCC holder R = DVA yellow card holder L = DVA white card holder.
16	SEX	Patient's gender
17	S_NET	Safety net number

Position	Field name	Description
18	CHART_NO	Patient's record number (paper record)
19	LINK_TO	Patient identifier of head of family
20	LINKCODE	A = Add (new) U = Update
21	EMAIL	Patient's email address
22	REFDOCTOR	Referring Doctor's name
23	REFDATE	Date of referral (dd/mm/yyyy)
24	REFCODE	Referral duration code: 00 =Indefinite 03 = 3 Months 12 = 12 Months
25	INSNO	Patient's Health Insurance number
26	INSCO	Patient's Health Insurance provider
27	DECEASED	Date of death (dd/mm/yyyy)

VISITS.OUT

The 'Visits.out' file is used to transfer Medicare item data to third-party software packages.

Position	Field name	Description
1	ExternalID	Patient identifier generated by billing program
2	SURNAME	Patient's surname
3	FIRSTNAME	Patient's first name
4	TITLE	Patient's title
5	ADDRESS	Patient's street address
6	CITY	Patient's residential city
7	POSTCODE	Patient's postcode
8	CHART_NO	Patient's record number (paper record)

Position	Field name	Description
9	PENS_NO	Pension number
10	DVA_NO	DVA number
11	PENSCODE	Pension code: P = Pension/HCC holder R = DVA yellow card holder L = DVA white card holder.
12	S_NET	Safety net number
13	MC_NO	Patient's Medicare number
14	MC_INDEX	Patient's Medicare IRN (0-9)
15	PROV_NO	Doctor's provider number
16	DR_NAME	Doctor's name
17	VISITDATE	Visit date
18	ITEMLIST	List of Medicare item numbers, with 'NNAC' appended if Not normal aftercare was ticked
19	DURATION	Duration of the visit as recorded by the timer at the time the save button is pressed
20	NOTES	Contents of the Notes field on the Medicare window

DDE LINK SPECIFICATION

Bp Premier is a Dynamic Data Exchange (DDE) server and will listen for specific DDE commands, described below. Commands can be used to control Bp Premier, send data, and update patient records. Transferred data is in text format.

The following commands are available for the 'PATIENT' topic.

Field	Description
OPEN[parameter]	Opens the patient's current Rx
HISTORY[parameter]	Opens the patient's past history
IMMS[parameter]	Opens the patient's immunisation record
PATHOL[parameter]	Opens the patient's investigation reports

Field	Description
PAP[parameter]	Opens the patient's cervical smears reconrd
ANTENATAL[parameter]	Opens the patient's obstetric history
SCRIPTS[parameter]	Opens the patient's past Rx
LETTERS[parameter]	Opens the patient's correspondence out
UPDATE[parameter]	Updates the patient's demographic details

The parameter must be a string containing the patient demographic data as per the format outlined below.

Fields are buffered with spaces (ASCII character code '32'). Blank fields can be contained in a line, as long as the correct positions of the fields that follow are maintained.

Position	Field name	Length	Description
1	UR_NO	9	Unique ID for each patient. May contain letters or numbers in character format. UR_NO needs to be unique, because the field is used as a key to identify patients and associated clinical details. This field should be generated by the system when a new patient record is initiated.
2	TITLE	5	Patient's title
3	SURNAME	30	Patient's surname
4	FIRSTNAME	30	Patient's first and other names
5	ADDRESS	40	Street address and number
6	CITY	25	Patient's residential city or suburb
7	POSTCODE	4	Patient's postcode
8	DOB	10	Date of birth in format dd/mm/yyyy
9	MC_NO	12	Patient's Medicare number
10	MC_INDEX	1	Patient's Medicare IRN
11	PENS_NO	14	Patient's Pension number
12	DVA_NO	14	Patient's DVA number
13	H_PHONE	14	Home phone number
14	W_PHONE	14	Work phone number

Position	Field name	Length	Description
15	CODE	1	P = Pension/HCC holder R = DVA yellow card holder L = DVA white card holder
16	SEX	1	M or F
17	S_NET	14	Safety net number
18	RECORD_NO	10	Paper-based record number (for example, RACGP filing system)
19	LINK_TO	9	UR_NO of head of family
20	LINKCODE	1	A = Add U = Update D = Delete