

# Bp Premier Management Setup Guide

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Last updated: June 2017

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

## Setting up the Management module for the first time

After you have installed Bp Premier for the first time, or converted from a previous clinical software package, you must apply a minimum of configuration to start using Bp Premier. The following provides a general overview on how to set up the components of the Management module of Bp Premier.

Before you begin:

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

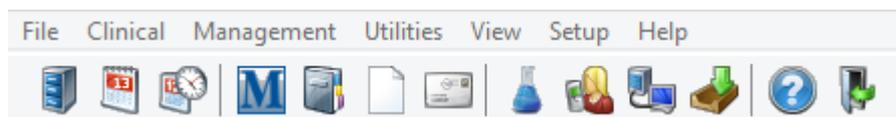
If you have already set up the Clinical module of Bp Premier, you may have already performed some of the steps below. See **Setting up the Clinical module for the first time** in the Bp Premier Knowledge Base for more information.

Complete each section in sequence. Best Practice Software appreciates that it can take some time to configure software to completely suit a practice's preferences and workflows. All of the settings described in this section can be reversed or changed at any later time.

## MANAGEMENT MODULE ADDITIONAL FEATURES

When a licence key that has the Bp Premier Management module enabled is entered into Bp Premier, additional toolbar icons and menu items become available.

On the main menu, a **Management** heading appears in the menu options. New icons will appear for the **Appointment Book** and **Waiting room**, depending on the user's permissions within Bp Premier.



Additional preferences will appear for each user in the **Setup > Users** screen, as well as a **Set Reports** button to give users access to Management reports. Three new options under the **Setup** menu option will configure Sessions, Practice fees, and Cheques.

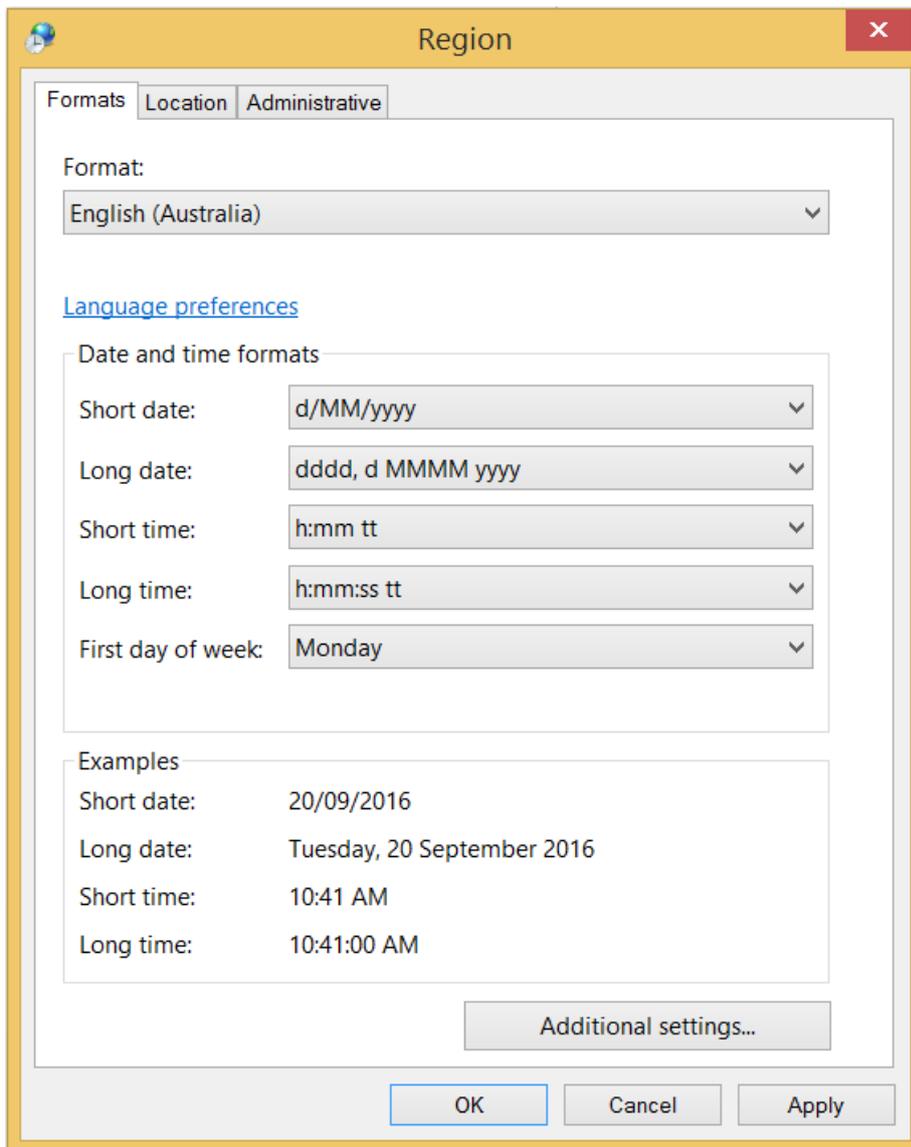
The **Setup > Configuration** screen will have new tabs to configure Appointments, Billing, SMS, Account text, Payer allocation, Bank accounts, and Work Cover details.

## SET DATE, TIME, AND REGION

The Windows operating system on the Bp Premier server must have the region, date/time format, and time zone set to 'Australia' for Bp Premier to function correctly. If the date/time format is set to an American usage, for example, Bp Premier may not be able to synchronise with third-party software like messaging services and My Health online.

1. On the Bp Premier server, open the **Control Panel** and select **Date and Time**. Alternatively, click once on the clock in the bottom right of the desktop and select **Change Date and Time Settings**.

2. Set the **Time Zone** to your Australia time zone and enable daylight savings if your state uses daylight savings.
3. From the control panel, select **Region**.
4. Set the **Format** to 'English (Australia)'.  
5. Set the **short date** format to a format that lists date, then month, then year. For example, 'd/MM/yyyy' or 'd/MM/yy'. Do not use a month-first format.
6. Select the **Location** tab and set the **Location** to 'Australia'.
7. Click **Ok** to save and exit the **Region** dialog.



## ENTER PRACTICE DETAILS

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

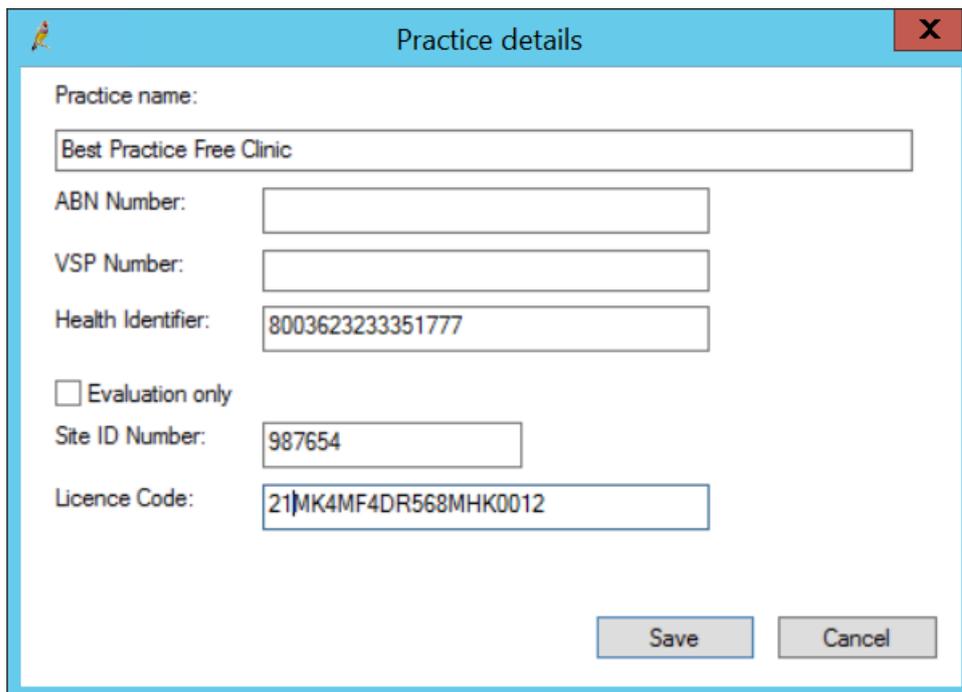
If you are starting from an empty database, you are prompted to enter the practice details when you first log in to Bp Premier.

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

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

To add practice details:

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



The screenshot shows a window titled "Practice details" with a close button (X) in the top right corner. The window contains the following fields and options:

- Practice name: Best Practice Free Clinic
- ABN Number: [Empty field]
- VSP Number: [Empty field]
- Health Identifier: 8003623233351777
- Evaluation only
- Site ID Number: 987654
- Licence Code: 21MK4MF4DR568MHK0012

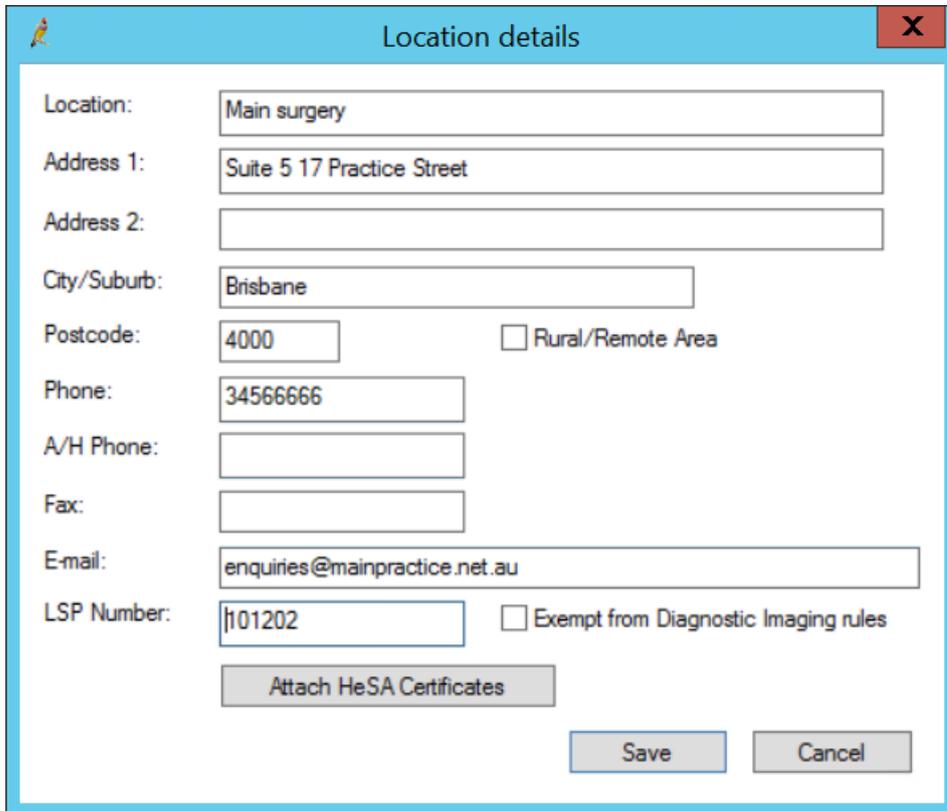
At the bottom right of the window are two buttons: "Save" and "Cancel".

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

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

To add a location:

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



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

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

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

To delete a location:

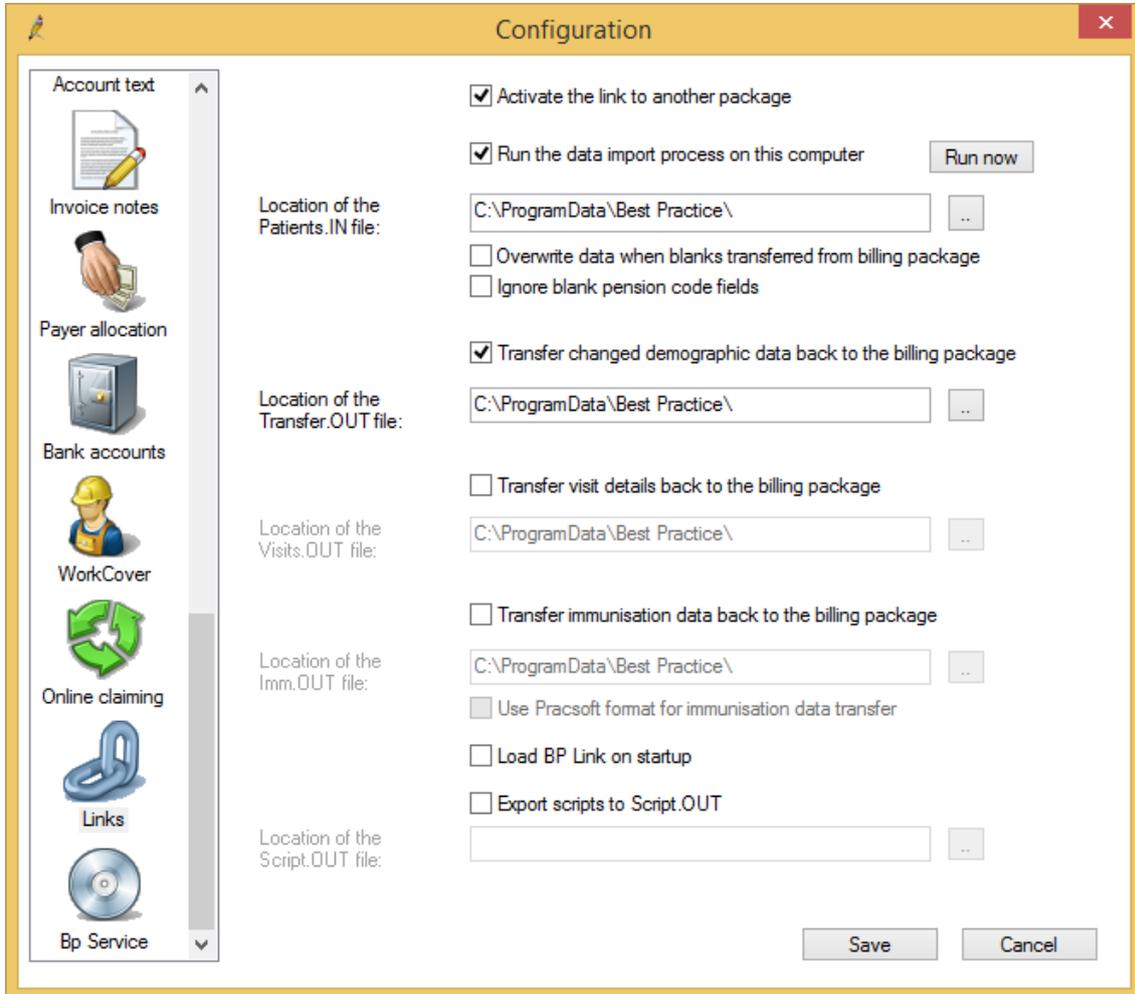
1. Select the location on the **Practice details** screen and click **Delete**. A prompt will appear if any users have provider numbers linked to that location.
2. If the location is deleted, users with linked provider numbers will still be visible, but the provider number linked to that location will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

To restore a deleted location:

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

## CONFIGURE BILLING

### 1. Turn off links to a prior billing package



The screenshot shows the 'Configuration' dialog box with the 'Links' tab selected. The settings are as follows:

- Activate the link to another package
- Run the data import process on this computer (with a 'Run now' button)
- Location of the Patients.IN file: C:\ProgramData\Best Practice\
- Overwrite data when blanks transferred from billing package
- Ignore blank pension code fields
- Transfer changed demographic data back to the billing package
- Location of the Transfer.OUT file: C:\ProgramData\Best Practice\
- Transfer visit details back to the billing package
- Location of the Visits.OUT file: C:\ProgramData\Best Practice\
- Transfer immunisation data back to the billing package
- Use Pracsoft format for immunisation data transfer (disabled)
- Load BP Link on startup
- Export scripts to Script.OUT
- Location of the Script.OUT file: (empty)

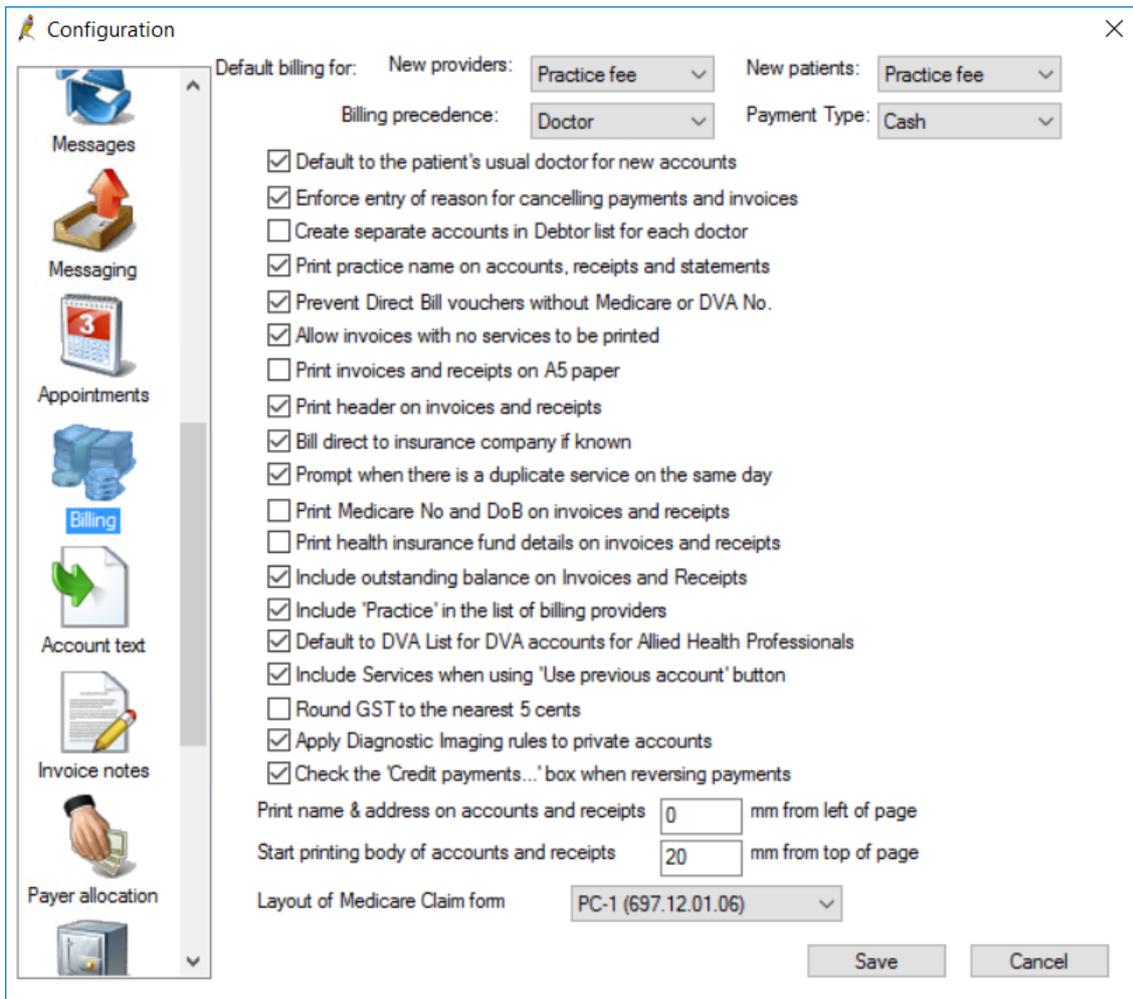
If the practice previously used a third party billing package and had a link established to transfer information between Bp Premier and this third party package, it will be necessary to disable this link.

**To turn off the link**, untick the selection **Activate the link to another package**. This will grey out all the paths and disable the linking process.

**Note:** *Disable this setting on each workstation.*

### 2. Set up billing preferences

The **Billing** tab of the **Configuration** screen sets up the way accounts, payments, invoice and receipts work at your practice.



Configure the fields in this screen to suit your practice's preferences.

Field	Description
<b>Default billing</b>	Sets the default billing type when new providers are added.
<b>New patients</b>	Sets the default billing type when new patients are added.
<b>Billing precedence</b>	Determines whether the doctor's or patient's billing type is used as the default when creating accounts. The billing type can be changed before printing or saving the account: <ul style="list-style-type: none"> <li>■ If set to 'Doctor', all patients seen by that doctor will be billed according to the doctor's default billing.</li> <li>■ If set to 'Patient', the patient will always be billed according to the patient's billing type.</li> </ul>
<b>Payment Type</b>	Determines which <b>payment type</b> will be selected when you first open the <b>Payments</b> screen: None, Cash, EFT, or Credit card.
<b>Default to the patients usual doctor for new accounts</b>	If ticked, all new accounts generated from the <b>Create Account</b> screen will be billed to the provider listed in the patient's <b>usual doctor</b> field in the patient's demographics record.

Field	Description
<b>Enforce entry of reason for cancelling payments and invoices</b>	If ticked, users must enter a reason for cancelling payments and invoices.
<b>Create separate accounts in Debtor list for each doctor</b>	If ticked, the debtor list will generate separate debtor statements for each doctor and a drop down box will appear on the 'Debtor list screen to allow you to select the doctor. If unticked, the 'Debtor list screen will produce debtor statements for the practice rather than each doctor.
<b>Print practice name on accounts, receipts and statements</b>	If ticked, the practice name and address entered in the <b>Setup &gt; Practice details &gt; Edit</b> screen will be printed on all accounts, receipts, and statements. If unticked, the doctor's name and details will be printed on all accounts, receipts, and statements.
<b>Prevent Direct Bill vouchers without Medicare and DVA no.</b>	If ticked, accounts which are direct-billed to Medicare or DVA can't be entered if the Medicare number or DVA number is not recorded on the patients demographic record. If unticked, accounts can be direct-billed if the Medicare number or DVA number is not recorded.
<b>Allow invoices with no services to be printed</b>	If ticked, accounts that do not contain any services can be printed. If unticked, blank accounts can not be printed.
<b>Print invoices and receipts on A5 paper</b>	If ticked, all invoices and receipts will print in A5 format. If unticked, all invoices and receipts will print in A4 format.
<b>Print header on invoices and receipts</b>	If ticked, all invoices and receipts will have the practice or doctor details printed at the top of the page (see also setting for <b>Print practice name on accounts, receipts and statements</b> ). If unticked, nothing will be printed at the top of invoices and receipts. The letterhead will be used.
<b>Bill direct to insurance company if known</b>	Tick this box if you want any accounts created for the patient to default to bill to the insurance company noted on the patient's demographics record.
<b>Prompt when there is a duplicate service on the same day</b>	Tick this box to display, when saving an invoice, if an item number listed on the invoice has already been billed that day.
<b>Print Medicare No and DoB on Invoices and receipts</b>	Tick this box to print the patient's Medicare number and date of birth in their invoices and receipts.
<b>Print health insurance fund details on invoices and receipts</b>	Tick this box to print a patient's health care fund details from their demographic record in the patient's invoices and receipts.
<b>Include outstanding balance on Invoices and Receipts</b>	Tick this box to print outstanding balances on invoices and receipts.

Field	Description
<b>Include Practice in the list of billing providers</b>	Tick this box to include the provider's practice in the list of billing providers when creating an account.
<b>Default to DVA list for DVA accounts for Allied Health Professionals</b>	Tick this box to display the <b>Allied Health DVA</b> item list when creating accounts for DVA patients.
<b>Include Services when using 'Use previous account button</b>	If ticked, the <b>Use previous accounts</b> function is available when creating an account to default to, including services.
<b>Round GST to the nearest 5 cents</b>	Rounds GST amounts up or down to the nearest 5 cents.
<b>Apply Diagnostic Imaging rules to private accounts</b>	Lava Service Pack 1 only.  Apply the multiple services rules for diagnostic imaging, as applied to Medicare and DVA accounts, to private fee accounts also.
<b>Check the 'Credit payment...' box when reversing a payment</b>	Lava Service Pack 1 only.  When reversing a payment, tick the <b>Credit payment to payer's account</b> checkbox on the <b>Reverse Payment</b> popup by default.  If the <b>Credit payment to payer's account</b> checkbox is ticked, the refunded amount will be credited to the payer's account. See <b>Reverse an unbanked payment</b> in the Bp Premier Knowledge Base for more information.
<b>Print name &amp; address on accounts and receipts __ mm from left of page</b>	Adjusts where the name and address is printed on accounts or receipts from the left of page.
<b>Start printing body of accounts and receipts __ mm from to top of page</b>	Adjusts where the body of accounts and receipts are printed from the top of the page. This setting is useful if your practice prints on preprinted letterheads or forms.
<b>Layout of Medicare Claim form</b>	Medicare regularly change the layout of their green claim form. This option allows you to change the print format to match the form you are using. The form number is printed on the bottom left hand side of the Medicare claim form.

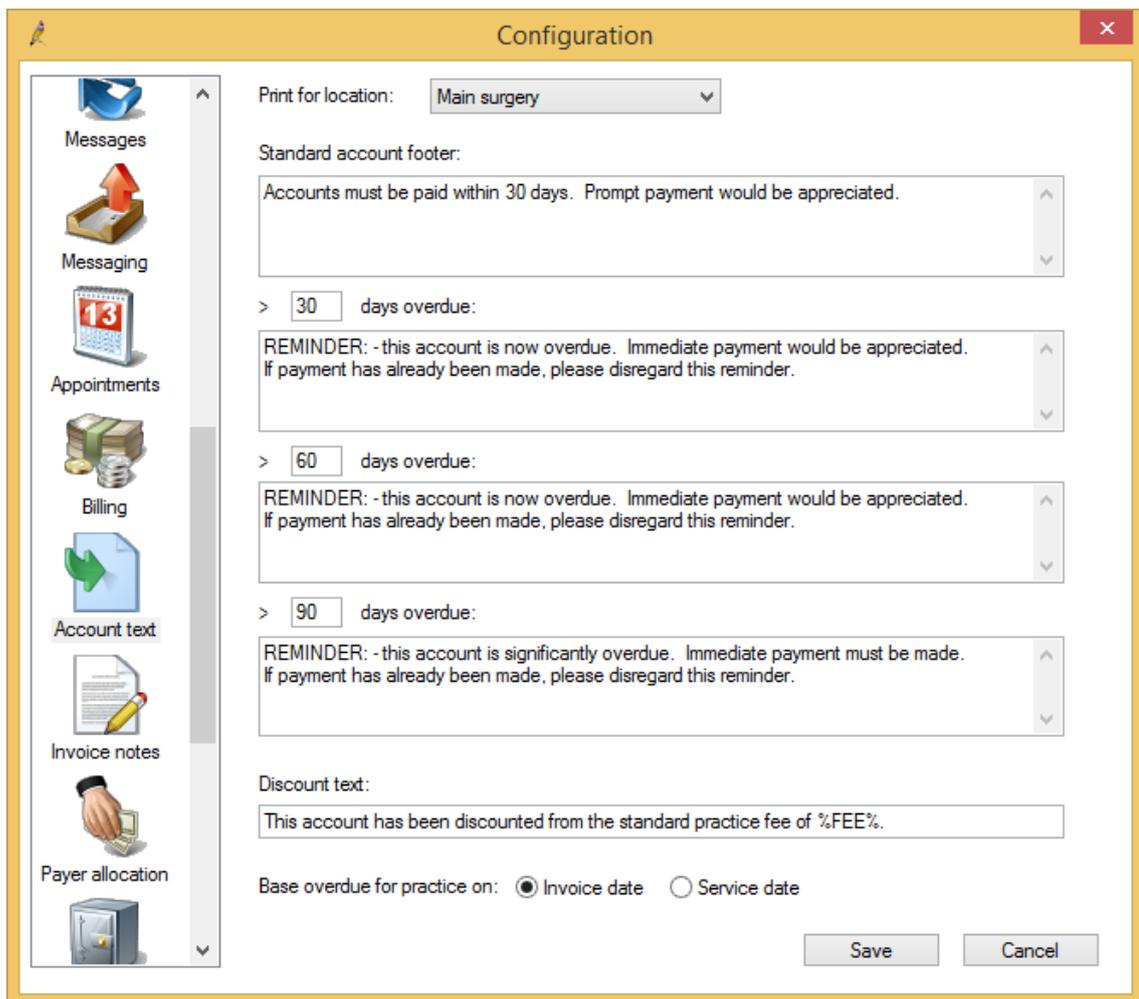
### 3. Set up Account Holders

Accounts holders are companies and institutions that can be used as a third party account recipient for patient accounts (for example, Insurance Companies, Employers, or Hospitals). Account holders can also be used as an account recipient for non-patient accounts.

1. From the main Bp Premier screen, select **View > Account Holders**.
2. Select **Add new** to add a new account holder.

#### 4. Set the default account text

1. From the **Configuration** screen, select the **Account text** tab. This screen configures the text that is printed at the bottom of accounts.



**Configuration**

Print for location:

Standard account footer:

>  days overdue:

>  days overdue:

>  days overdue:

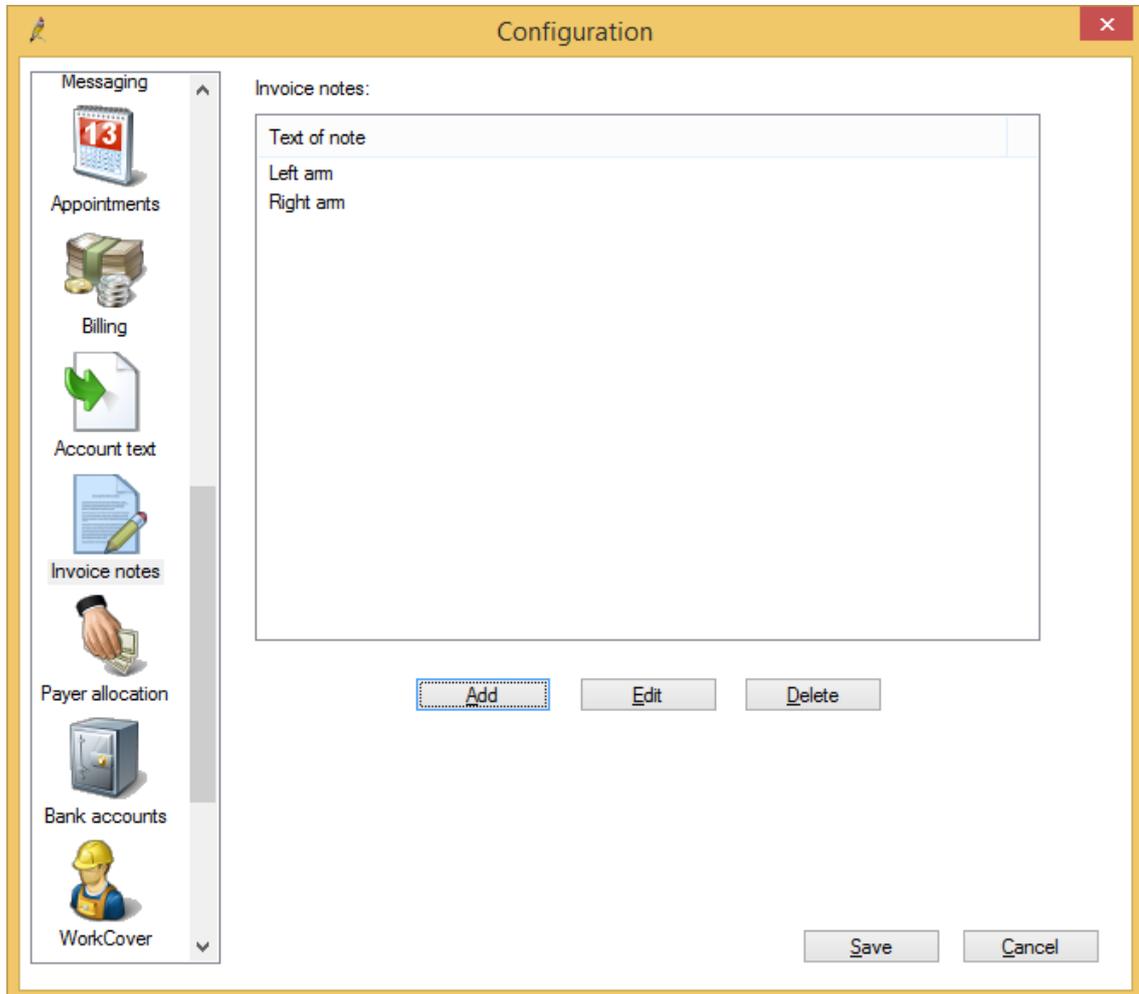
Discount text:

Base overdue for practice on:  Invoice date  Service date

2. If your practice has multiple locations, choose the practice location to set account text for from the **Print for location** field.
3. Set the different text based on the length of the overdue period for none, 30, 60, and 90 days.
4. Set the **Discount text** message. This text is printed on any accounts that are billed at a rate called 'Discount'. Any text here can contain the placeholder **%FEE%**, which is replaced during printing with the value of the account at the practice fee rate (not the discount rate).
5. Click **Save**.
6. Repeat steps 2-5 for each location you want to set invoice text for.

## 5. Set up invoice notes

1. From the **Configuration** screen, select the **Invoice notes** tab. This screen sets up a standard set of notes or service text that can be selected when creating Invoices.



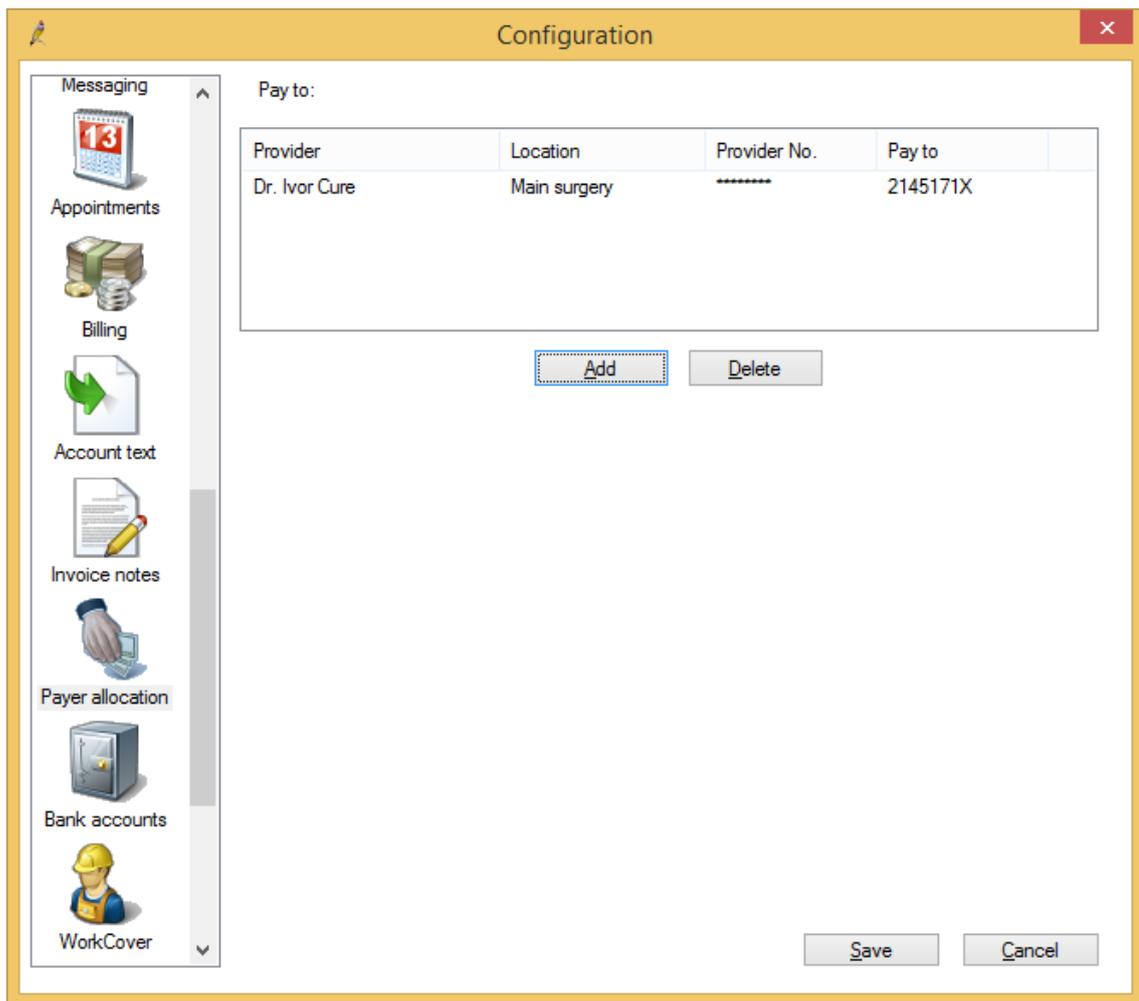
2. Select **Add** to add a new invoice note.
3. Click **Save** when you are finished creating invoice notes.

Invoice notes help ensure that Medicare accounts are created consistently.

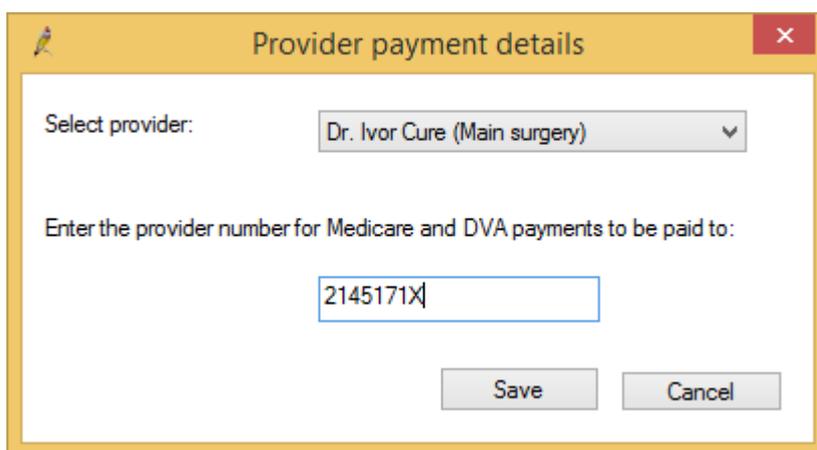
## 6. Set up payer allocation

Use payer allocation settings if an employee doctor's bulk bill payments are paid into the principal doctor's bank account and distributed later.

1. From the **Configuration** screen, select the **Payer Allocation** tab. This screen directs bulk billing payments to a provider other than the actual service provider.



2. Click **Add** to add a new payer allocation. The **Provider payment details** screen will appear.

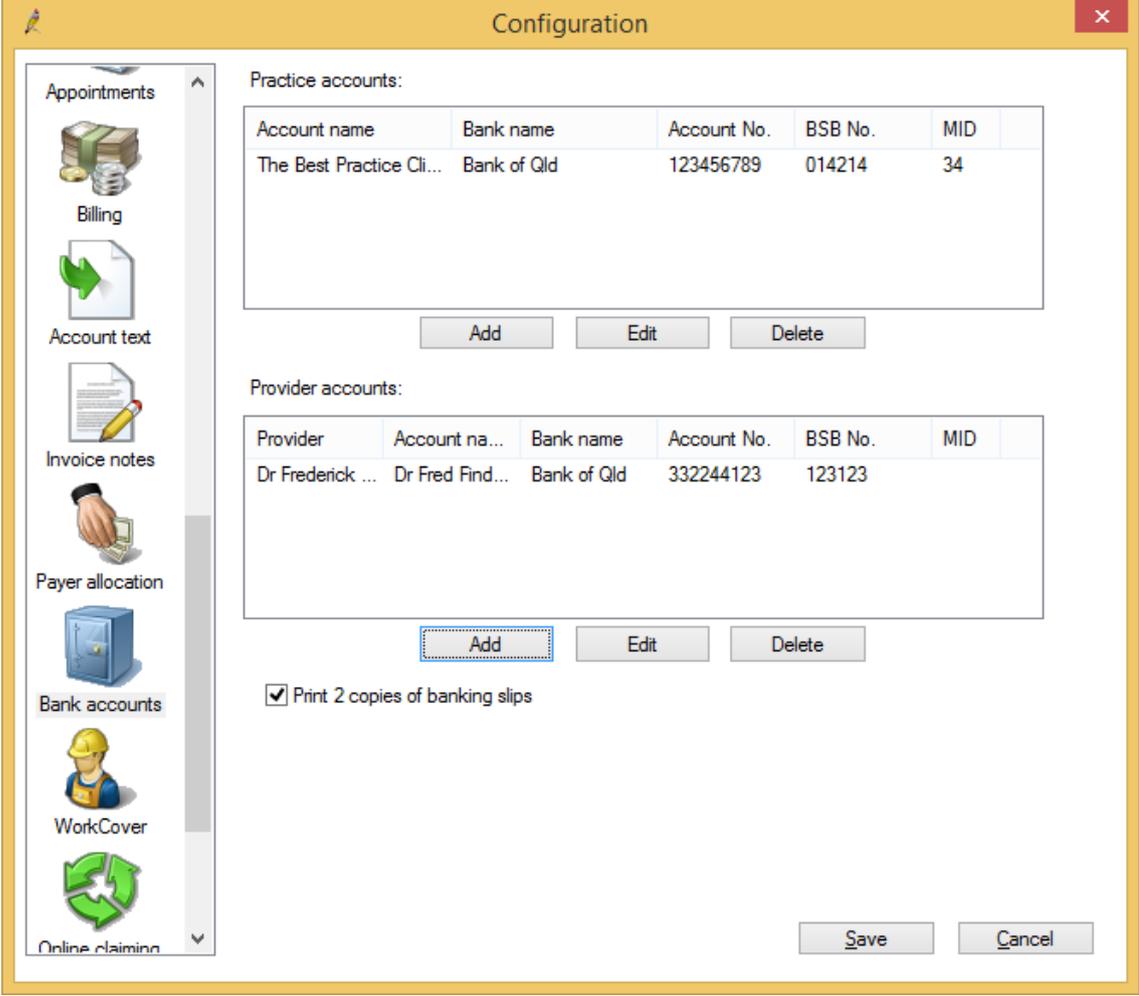


3. **Select the provider** who is performing services. Payments to this doctor will be paid into an alternate provider's bank account.
4. **Enter the provider number for Medicare and DVA payments to be paid to.** Payments will be paid to the bank account of the provider entered into this field.

## 7. Set up bank accounts

The **Bank accounts** tab configure bank accounts for your practice and providers.

1. From the **Configuration** screen, select the **Bank accounts** tab.



**Configuration**

Practice accounts:

Account name	Bank name	Account No.	BSB No.	MID
The Best Practice Cli...	Bank of Qld	123456789	014214	34

Add Edit Delete

Provider accounts:

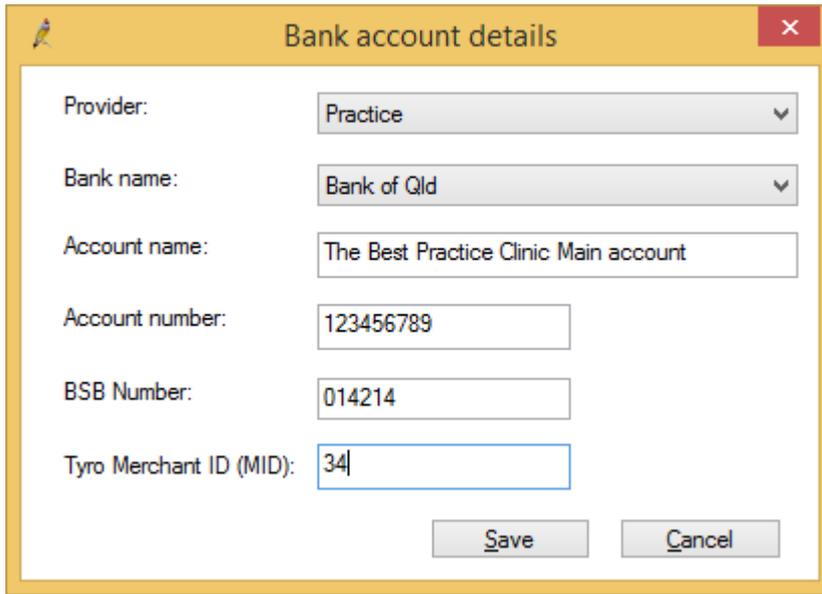
Provider	Account na...	Bank name	Account No.	BSB No.	MID
Dr Frederick ...	Dr Fred Find...	Bank of Qld	332244123	123123	

Add Edit Delete

Print 2 copies of banking slips

Save Cancel

2. Click **Add** under **Practice accounts** to open the **Bank account details** screen for the practice.



**Bank account details**

Provider: Practice

Bank name: Bank of Qld

Account name: The Best Practice Clinic Main account

Account number: 123456789

BSB Number: 014214

Tyro Merchant ID (MID): 34

Save Cancel

3. Complete the account details and click **Save**. You can add as many bank accounts for the practice as you need.
4. Click **Add** under **Provider accounts** to open the **Bank account details** screen for a provider.
5. Complete the account details for the provider and click **Save**. You can add as many bank accounts for providers as you need.

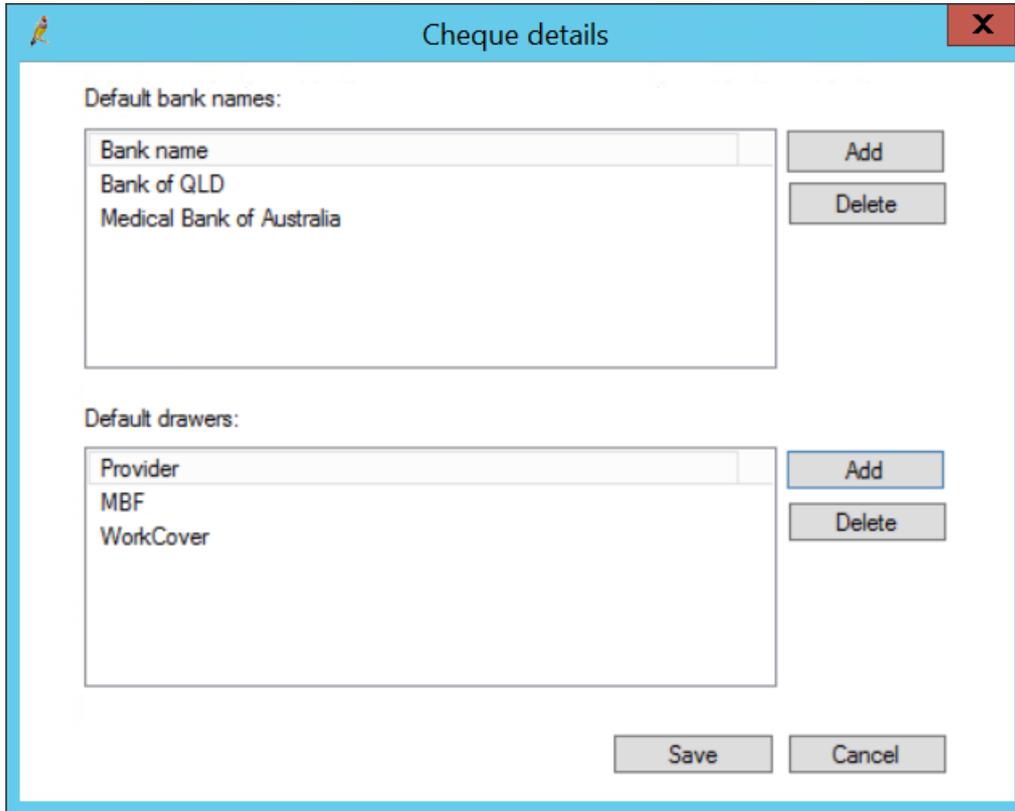


*Tip: If the bank name you wish to use is not listed, you can add a new bank by selecting **Setup > Cheque details** from the main Bp Premier screen.*

## 8. Add bank names and drawer details

The **Cheque details** screen adds the names of banks that are available when adding cheques to the **Process Payment** screen.

1. From the main Bp Premier screen, select **Setup > Cheque details**.



**Cheque details** [X]

Default bank names:

Bank name
Bank of QLD
Medical Bank of Australia

[Add] [Delete]

Default drawers:

Provider
MBF
WorkCover

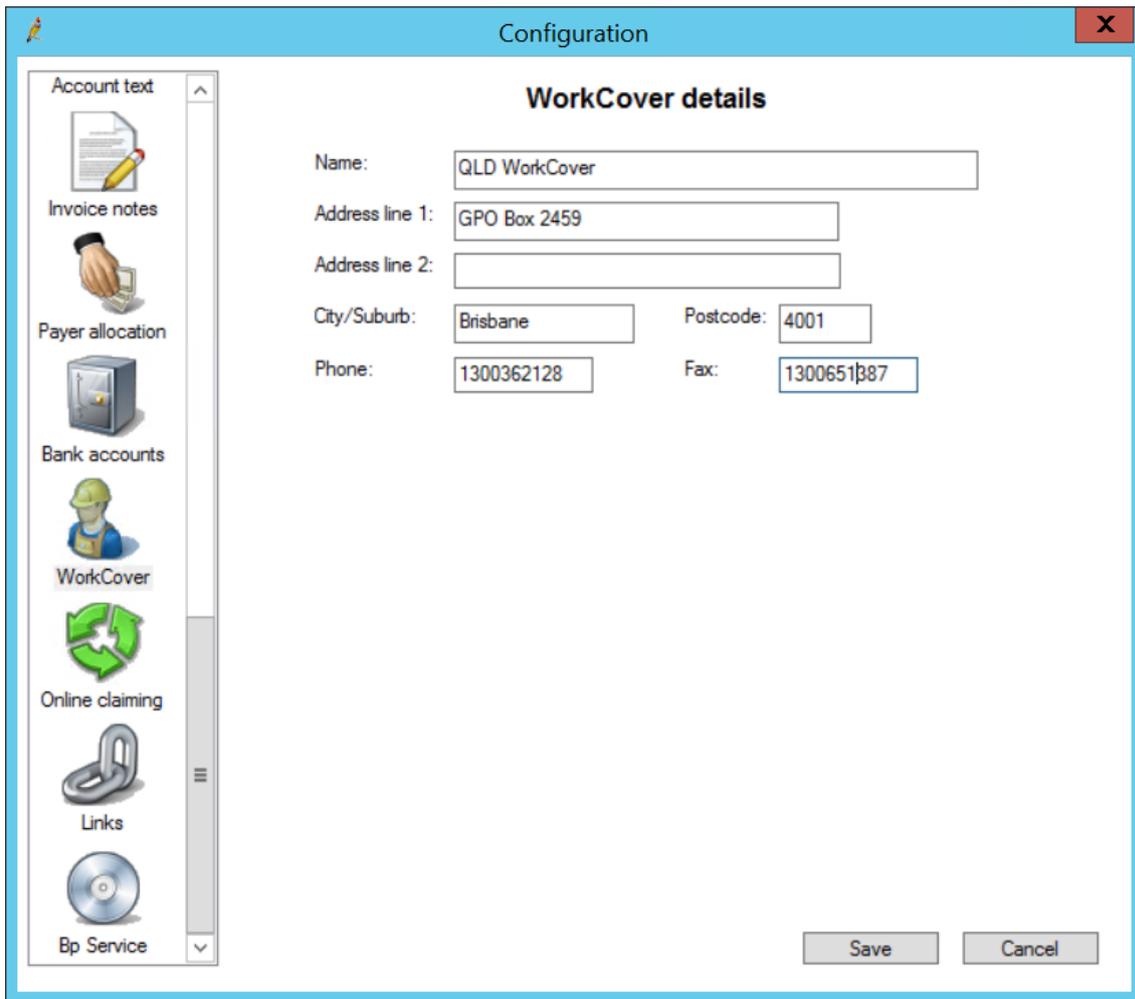
[Add] [Delete]

[Save] [Cancel]

2. Click **Add** next to the **Default bank names** list to add a new bank name.
3. Click **Add** next to the **Default drawers** list to add names of payers who regularly pay by cheque. The names in this list will be available in the **Drawer** list when adding cheques to the **Payments** screen.
4. Click **Save**.

## 9. Set up WorkCover defaults

The **Workcover** tab of the **Configuration** screen records details that will be used on accounts when 'WorkCover' is selected in the **Create account** screen.



The screenshot shows a 'Configuration' dialog box with a sidebar on the left and a main area on the right. The sidebar contains icons and labels for: Account text, Invoice notes, Payer allocation, Bank accounts, WorkCover (highlighted), Online claiming, Links, and Bp Service. The main area is titled 'WorkCover details' and contains the following fields:

Name:	QLD WorkCover		
Address line 1:	GPO Box 2459		
Address line 2:			
City/Suburb:	Brisbane	Postcode:	4001
Phone:	1300362128	Fax:	1300651387

At the bottom right of the dialog box are 'Save' and 'Cancel' buttons.

*Note: These details would most likely be used in Queensland where there is a centralised facility for Workcover. In other states, Workcover accounts are often issued to individual employers or insurance companies.*

## CONFIGURE USERS

### 1. Add users

If you have not converted from a previous clinical management package, you will need to create records for each staff member who will be using Bp Premier, including doctors, nurses, reception staff, and practice managers.

If you have converted from other management software, you will need to configure the converted users to match your practice's workflows in Bp Premier, and to grant permissions to access reports and functionality appropriate to each user.

You can create a new user in several different ways, depending on the user type and practice preference. See **Adding a new user** in the Bp Premier Knowledge Base for more information.

## 2. Grant user permissions

When a new user is added, Bp Premier automatically allocates permissions according to the **Category** in the **User details** screen. You can modify permissions from the default for individual users.

***Note:** If your practice has just enabled the Management module for the first time, Bp Premier users that were in the system before enabling Management will have no management permissions. You will need to review their permissions before they can use any of the management features.*

See **Adding a new user** in the Bp Premier Knowledge Base for more information.

## 3. Grant user access to reports

Bp Premier provides dozens of reports with the Management module. When you add a new user, Bp Premier will prompt you for the reports the user has access to.

***Important:** Only certain categories of user will prompt for reporting permissions when created. Other categories, such as 'Nurse' or 'Junior receptionist', will not be granted access to reports by default. You will need to set the **Reports** permission on the user's **Permissions** screen to 'Allow access' to enable the **Set Reports** button.*



*If you change a user's **Category**, Bp Premier will prompt you to reset the user's reporting permissions to the defaults for the new category.*

1. Open the **User Details** screen for the user.
2. Click **Set Reports**. The **Setup reports** screen appears.
3. Select the **Report Types** in the top right you want to grant access to: New, Old, or All. The report types will be displayed in the list of reports on the left hand side.
4. Tick each report you want to user to be able to run.
5. Set the **Practitioner Access**:
  - All Practitioners — The selected reports will contain data from all practitioners at your practice.
  - Self Only Access — The selected reports will contain data only from patients and data for the current user.
6. Select the locations included in the reports from the **Locations Access** list.
7. To apply the settings on the right hand side to all selected reports, click **Apply to all ticked reports**. Otherwise, repeat steps 4-6 to configure access to individual reports.
8. Click **Save**.

See **Setting up users to run reports** in the Bp Premier Knowledge Base for more information.

## 4. Set user preferences

Preferences are set per individual user. Any user can update their own permissions as long as they have the relevant permission set in their user account.

See **Adding a new user** in the Bp Premier Knowledge Base for more information.

## CONFIGURE SESSIONS

Appointment book sessions determine the first and last sessions available at your practice and for each provider, as well as:

- lunch breaks
- public holidays and practice closing periods (for example, an office Christmas break shutdown)
- consultations outside of regular hours
- 'on the day' times for walk-ins and on the day appointments
- rostered times for providers on a 1-4 week roster cycle.

See **Setting up appointment book sessions for practice and providers** in the Bp Premier Knowledge Base for more information.

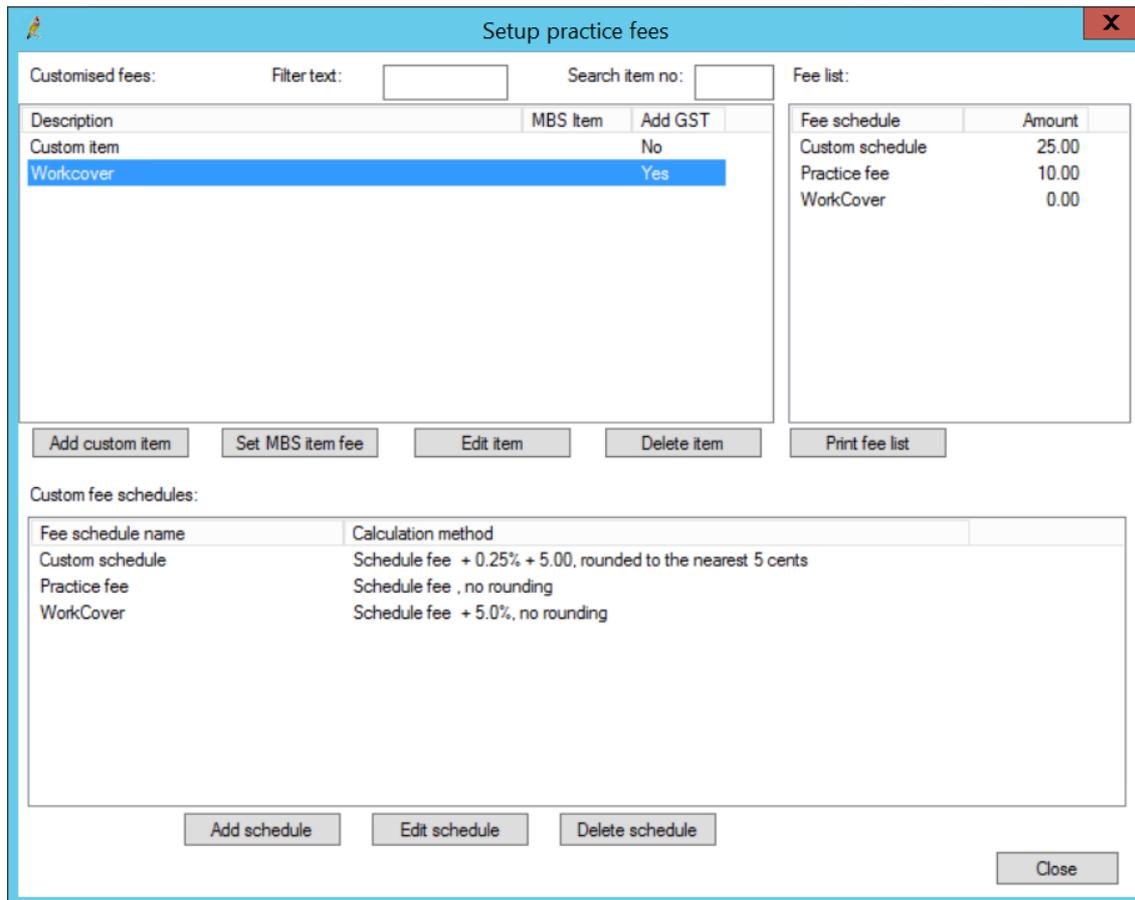
## CONFIGURE FEES

Bp Premier Management is distributed with the fee schedules for Medicare and the Department of Veterans Affairs.

The built-in practice fee defaults to the Medicare Benefits Schedule fee for each Medicare item. MBS schedules are available for use in the **Account details** screen when creating an account. The Medicare and DVA fee schedules cannot be changed nor added to by the user.

However, the practice fee schedule can be changed and can have other items added to it, and other fee schedules can be added, for example, AMA fees, or Workers Compensation fees.

Fees are configured by selecting **Setup > Practice fees**. The **Setup practice fees** screen will appear.



Description	MBS Item	Add GST
Custom item	No	No
Workcover	Yes	Yes

Fee schedule	Amount
Custom schedule	25.00
Practice fee	10.00
WorkCover	0.00

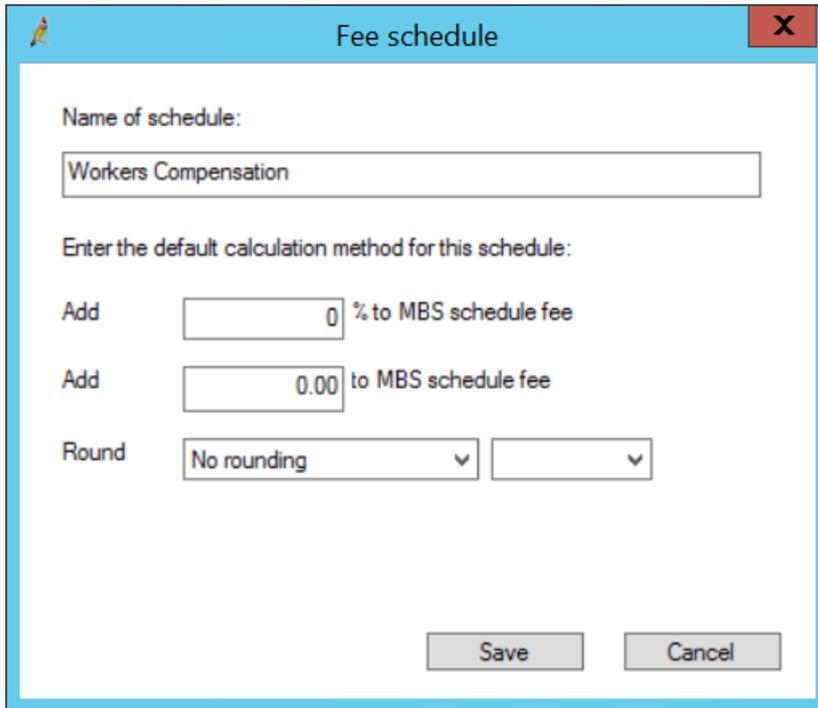
Fee schedule name	Calculation method
Custom schedule	Schedule fee + 0.25% + 5.00, rounded to the nearest 5 cents
Practice fee	Schedule fee , no rounding
WorkCover	Schedule fee + 5.0%, no rounding

### Add custom fee schedules

So that you can group custom fees when creating an account, you can set up as many custom fee schedules as your practice requires.

When staff are processing an account from the **Account details** window, all fee schedules that you have set up will be listed in the **Billing schedule** list. After you have selected a billing schedule from this list, any items added to the account will automatically use the fee for that item.

1. To add a fee schedule, click **Add schedule** at the bottom of the **Setup practice fees** screen. The **Fee schedule screen** will appear.



**Fee schedule**

Name of schedule:  
Workers Compensation

Enter the default calculation method for this schedule:

Add  % to MBS schedule fee

Add  to MBS schedule fee

Round

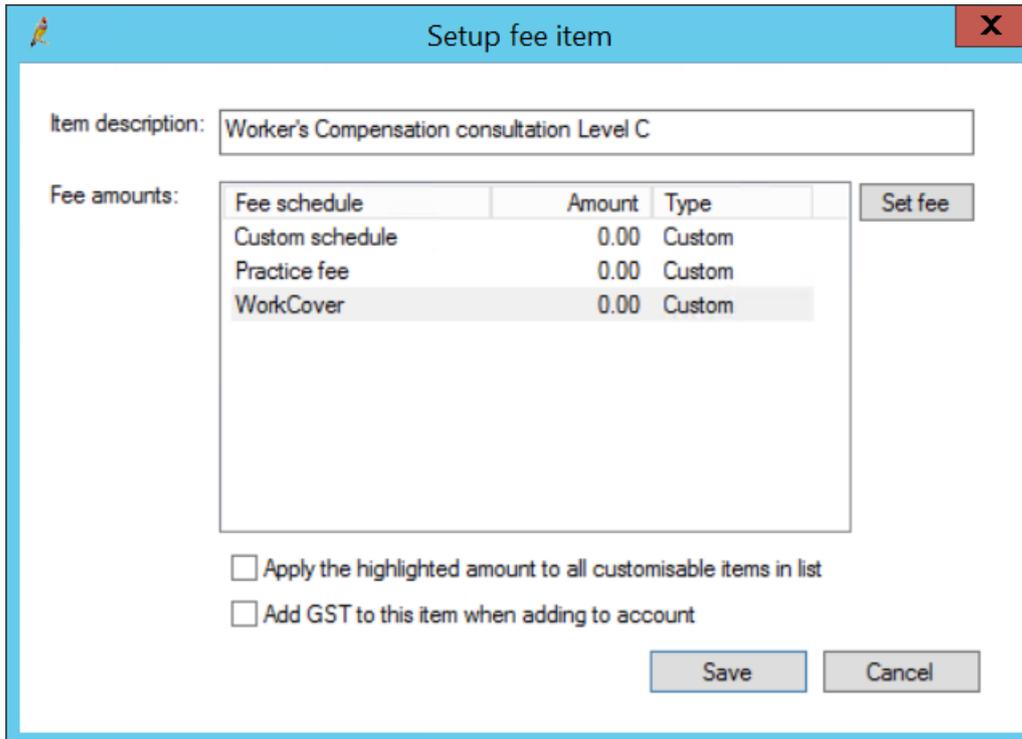
2. Enter the name of the schedule and indicate the default calculate method. No calculation method means users will enter the fees directly against the schedule.
3. Indicate the rounding method, if applicable.
4. Click **Save** to return to the **Setup practice fees** screen.

**Note:** If you create a fee schedule called "Discount", any accounts generated using that schedule will have the text from the **Discount** text field on the Configuration and Account text window added at the time of printing.

### Add custom items

Custom items are items not included in the Medicare and DVA fee schedules. At the top of the **Setup practice fees** screen is a list of **Customised Fees**, which lists all items that have been customised by the practice. This list will appear when finalising a visit or creating an account.

1. To add a custom item, such as AMA fees, click **Add custom fee**. The **Setup fee item** screen will appear.



**Setup fee item**

Item description:

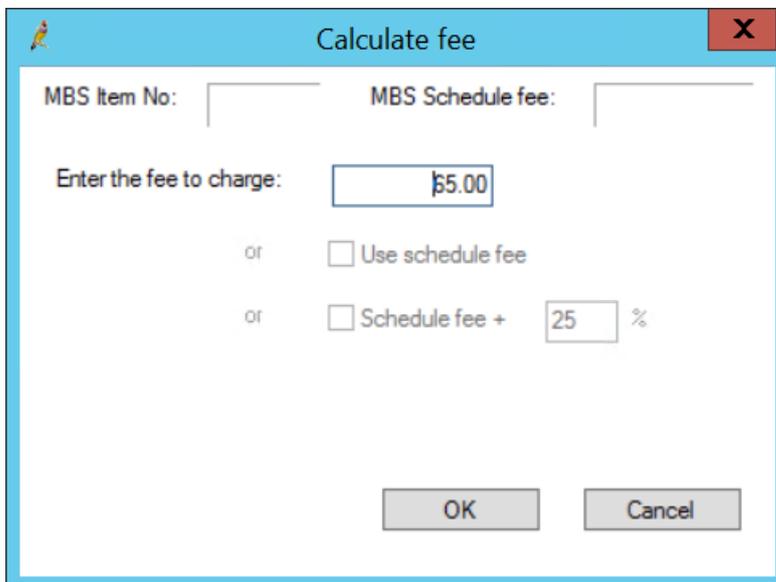
Fee amounts:

Fee schedule	Amount	Type
Custom schedule	0.00	Custom
Practice fee	0.00	Custom
WorkCover	0.00	Custom

Apply the highlighted amount to all customisable items in list

Add GST to this item when adding to account

2. Type in the item number and description of the item in the **Item description** field.
3. Select the fee schedule that you want to set this fee for and click **Set fee**. The **Calculate fee** screen opens.



**Calculate fee**

MBS Item No:  MBS Schedule fee:

Enter the fee to charge:

or  Use schedule fee

or  Schedule fee +  %

4. Enter the desired fee. For items that are not related to an MBS Item number, you can not select **Use schedule fee** or **Schedule fee + n %**. Click **OK** to save the change.
5. The fee entered will appear against the fee schedule selected in step 3. Tick **Apply the highlighted amount to all customisable items in list** to set this fee for all schedules listed.
6. Tick **Add GST to this item when adding to account** if the fee attracts GST.

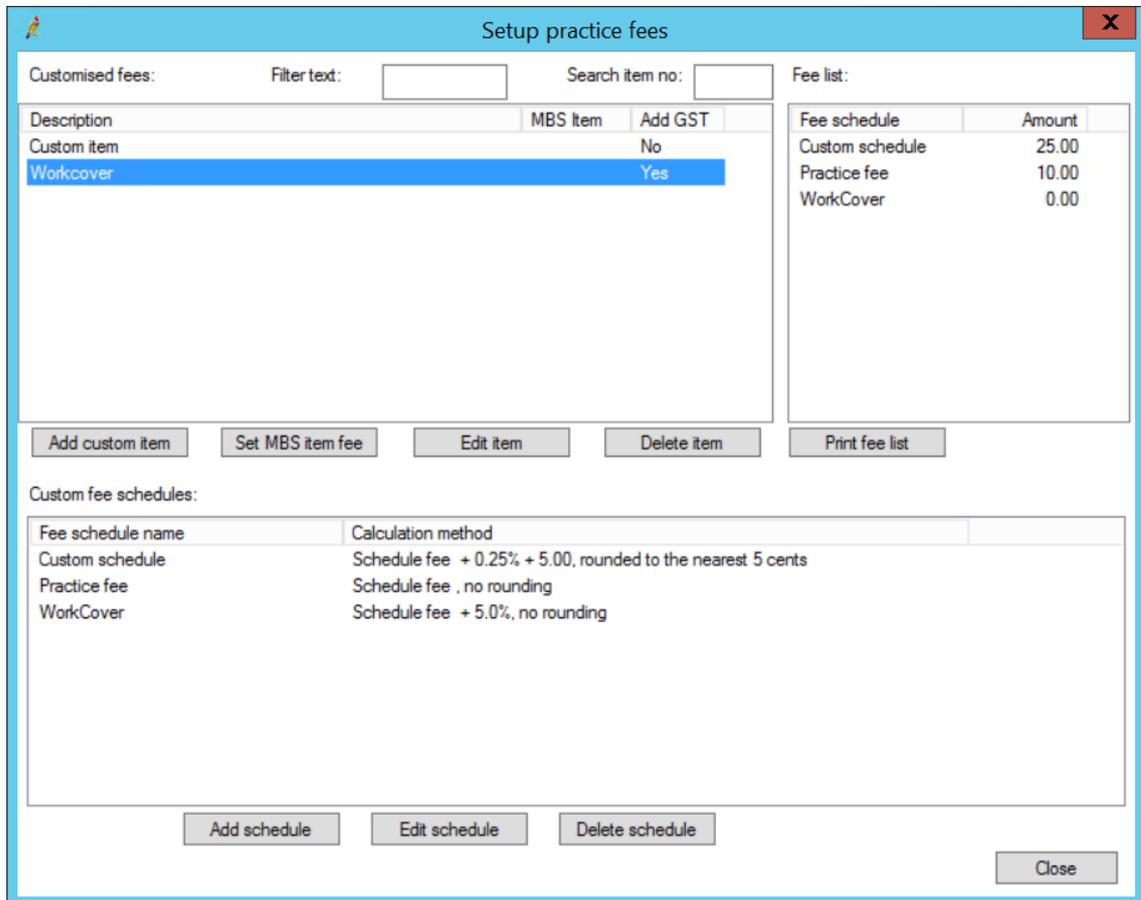
7. Click **Save** to save the fee. It will now appear in the **Customised fee list**.

### Adding a practice fee to an existing MBS item

1. Double-click on an item in the **Customised Fees** list to display the **Edit fee item** screen. Select the practice fee schedule and click **Set fee**.
2. From the **Calculate fee** screen, enter the practice fee to charge, or calculate the fee based on a percentage of the schedule fee or by adding a fixed amount to the schedule fee.
3. The fee displayed will be saved for that item. This fee is static and does not change when the schedule fee changes, even if it was calculated from the schedule fee.
4. This fee will now be used when creating accounts when the practice fee schedule is selected.

### Adding a practice fee to a new MBS item

1. Click **Set MBS item fee**. The **Set MBS Item fee** screen will be displayed.



**Setup practice fees** [X]

Customised fees: Filter text:  Search item no:  Fee list:

Description	MBS Item	Add GST	Fee schedule	Amount
Custom item	No	No	Custom schedule	25.00
Workcover	Yes	Yes	Practice fee	10.00
			WorkCover	0.00

Custom fee schedules:

Fee schedule name	Calculation method
Custom schedule	Schedule fee + 0.25% + 5.00, rounded to the nearest 5 cents
Practice fee	Schedule fee , no rounding
WorkCover	Schedule fee + 5.0%, no rounding

2. Enter the item number. The MBS and DVA fees will be displayed in a list below the description of the item.
3. Select **Practice fee** and double click or press the **Set fee** button to change the fee that will be charged for it. The **Calculate fee** screen will appear. Enter the fee to change and click **Save**.

## CONFIGURE ALL OTHER MANAGEMENT SETTINGS

### Set up eHealth

If the practice has not already been using Bp Premier for patient HI lookups and accessing My Health Record, you must import the practice's certificates and set up eHealth.

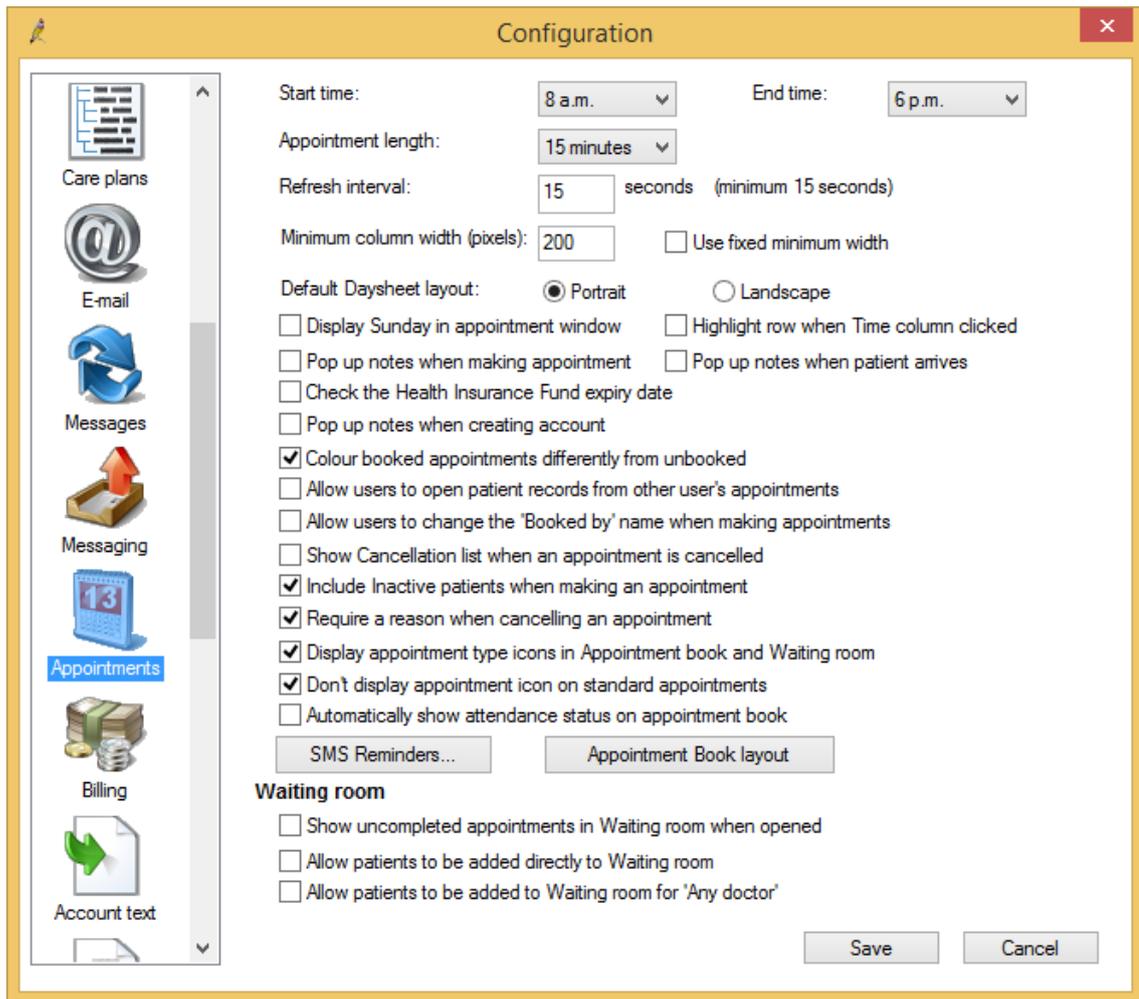
See **Preparing your practice for eHealth** in the Bp Premier Knowledge Base for more information.

### Set up Clinical lists

1. From the main Bp Premier screen, select **Setup > Configuration**. The **Configuration** screen will appear.
2. Select the **Lists** tab.
3. Add entries relevant to your practice for the following lists:
  - **Appointment Type** — A set of standard appointment types have been provided with matching icon. Create your own and assign your own icons.
  - **Reason for cancelling appointments** — A standard set of cancellation reasons, to save staff typing in text each time a patient cancels an appointment.
  - **Contact Categories** — Types of contacts (third-party groups and providers) relevant to your practice.
4. Click **Save**.

### Set up appointments

1. From the **Configuration** screen, select the **Appointments** tab. This page sets up the default appearance of your **Appointment** book.



2. Configure the fields in this screen to suit your practice's preferences for handling the Appointment book.

Field	Description
<b>Start time</b>	Sets the time of the first displayed appointment slot.
<b>End time</b>	<p>Sets the time of the last displayed appointment slot.</p> <p>These times are independent of the times set up for user sessions. If a user has sessions set up outside these ranges, those appointment slots will not be visible from the Appointment book.</p> <p> <b>Tip:</b> It is good practice to set these times one or two slots before and after the first and last appointments of the day. Setting a buffer like this creates a margin at the top and bottom of the appointment window that assists readability.</p>

Field	Description
<b>Appointment length</b>	<p>Sets the basic length of an appointment slot.</p> <p>All appointments in the system must be multiples of this length. If it is set to 15 minutes, appointments can be made at 15, 30, 45, or 60 minute intervals.</p> <p>If, for example, some doctors have appointments at 10 minutes length and other doctors at 15 minutes length, the <b>Appointment length</b> setting will need to be set to 5 minutes to show both types of appointments on the same Appointment book.</p> <p>Take the following into consideration:</p> <ul style="list-style-type: none"> <li>■ You should carefully consider the length you set here. Too small an interval will result in a large number of slots displayed, which may require more scrolling and decrease readability.</li> <li>■ Since the Appointments window allows double and even triple booking into the same timeslot, it may be more practical to use a 10 or 15 minute basic appointment length, and use double bookings for users who need longer appointments.</li> <li>■ Once this length has been set, changing it may result in appointments that have already been booked not appearing properly in the Appointments window; the appointments that do not correspond with the new times will be displayed at the next closest time after their original appointment time.</li> </ul> <p><i>Note: Individual doctor's appointment lengths are set when setting up their sessions.</i></p>
<b>Refresh Interval</b>	Sets the number of seconds between each refresh of the Appointment book.
<b>Minimum column width (pixels)</b>	Sets the minimum column width (in pixels) for each column on the Appointment book.
<b>Default Day sheet layout</b>	Portrait or Landscape.
<b>Display Sunday in appointment window</b>	Tick this box to include Sunday as a column in the display of week view in the Appointment book. If this is not checked, Sundays can still be displayed when the Appointment window is in day view.
<b>Highlight row when Time column clicked</b>	This checkbox highlights an entire row on the Appointment book when the <b>Time</b> column is clicked.
<b>Pop up notes when making an appointment</b>	<p>Bp Premier records notes against a patient's name in the <b>Appointment notes</b> field on the <b>Patient demographics</b> screen, and generates notes for items such as a patient has an outstanding account, or is due for a reminder to be sent.</p> <p>If the <b>Pop up notes when making an appointment</b> checkbox is ticked, notes are displayed on the <b>Add appointment</b> screen when making an appointment.</p>
<b>Pop up notes when patient arrives</b>	If ticked, patient notes are also displayed in a popup when a patient is marked as 'Arrived' in the Appointment book.

Field	Description
<b>Check the Health Insurance Fund expiry date</b>	If ticked, the Health Insurance Fund expiry date is checked when accounts are created and a prompt displayed if expired.
<b>Pop up notes when creating account</b>	If ticked, patient notes are also displayed in a popup when creating an account for the patient.
<b>Colour booked appointments differently from unbooked</b>	If ticked, booked appointments are displayed in a pale blue colour. If not, booked and unbooked appointments have the same colour in the same session.
<b>Allow users to open patient records from other user's appointments</b>	<p>If ticked, users who have access to open patient records will be able to start visits from other user's columns in the appointment book.</p> <p>This option is most commonly used if a practice has a treatment room that is used by many staff, and will allow the next available person to take the appointment.</p>
<b>Allow users to change the 'Booked by' name when making appointments</b>	If ticked, users can change the name of the person who has booked the appointment when creating the appointment.
<b>Show Cancellation list when an appointment is cancelled</b>	If ticked, when an appointment is cancelled, the cancellation list will show any patients who are waiting on an appointment to become available.
<b>Include Inactive patients when making an appointment</b>	If ticked, both inactive and active patients are displayed in the patient search screen.
<b>Require a reason when cancelling an appointment</b>	If ticked, the user will be forced to enter a reason for cancelling and appointment.
<b>Display appointment type icons in Appointment book and Waiting room</b>	If ticked, appointment book icons will appear next to appointments in the appointment book and waiting room.
<b>Don't display appointment icon on standard appointments</b>	If ticked, and the option <b>Display appointment type icons...</b> is ticked, standard appointments will not have icons displayed. next to them.

Field	Description
<b>Automatically show attendance status on appointment book</b>	<p>If ticked, an attendance icon indicates whether an appointment's attendance has been confirmed or declined:</p> <ul style="list-style-type: none"> <li>■ A green circle icon means that the appointment has been confirmed.</li> <li>■ A red circle icon means that the appointment has been declined.</li> <li>■ A yellow circle icon means that the appointment has been sent an SMS reminder, but has not confirmed or declined the appointment.</li> <li>■ No icon indicates that the appointment has not been sent an SMS reminder, and the appointment has not been confirmed or declined.</li> </ul>
<b>Show uncompleted appointments in Waiting room when opened</b>	<p>If ticked, patients that are currently “With doctor” or “At billing” remain displayed in the <b>Waiting room</b> screen.</p> <p>If not ticked, the same patients are removed from the <b>Waiting room</b> screen as soon as the doctor opens the patient record and starts a visit.</p>
<b>Allow patients to be added directly to Waiting room</b>	<p>If ticked, patients can be added to the <b>Waiting room</b> screen without having had an appointment made in the Appointment book.</p>
<b>Allow patients to be added to Waiting room for ‘Any doctor</b>	<p>If ticked, patients can be added to the <b>Waiting room</b> screen without being allocated to a specific doctor. Patients will be visible in all doctors' Waiting room screens, and any doctor can choose to see them.</p>

### Set up SMS Reminders

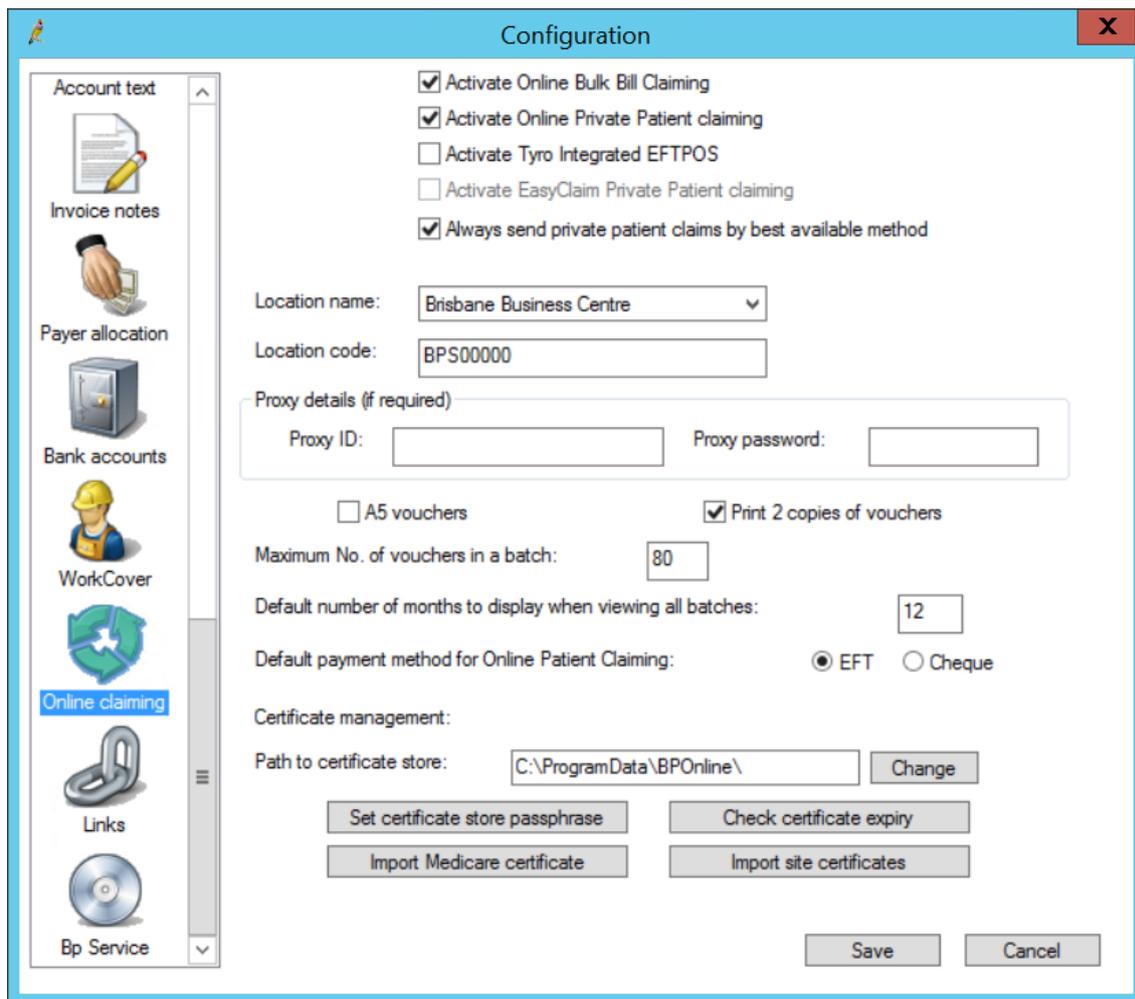
See **Setting up SMS reminders** in the Bp Premier Knowledge Base for more information.

### Set up Appointment book layouts

See **Creating an Appointment Book layout** in the Bp Premier Knowledge Base for more information.

## CONFIGURE ONLINE CLAIMING

Medicare online claiming is configured from the **Online claiming** tab of the **Configuration** screen.



See **Setting up Online Claiming for single location** in the Bp Premier Knowledge Base for more information.

## Import and export contacts

You can import and export contact records between Bp Premier installations.

### Export contacts

1. From the main menu, select **View > Contacts**. The **Contacts** screen will appear.
2. Select **File > Export all contacts**.
3. Browse to the folder where you want to save the export file. Change the **File name** from the default if you want and set to **Save as 'XML'**.
4. Click **Save** to export the contacts to file.

### Import contacts

1. On Windows XP or Windows 7, go to Windows **Start > All Programs > Best Practice Software > Best Practice > BP Utilities**

On Windows 8 and higher, click on the Windows flag icon in the bottom right, select the down arrow to view apps, and click on **BP Utilities** under **Best Practice Software**.

2. Enter a Bp Premier username and password into the login prompt. The **Bp Premier Utilities** screen will appear.
3. Double-click the **Import Contacts** utility. The **Import Contacts** screen will appear.
4. Click **Load File** and browse to the folder containing the contacts export file. Click **Open**. The list of exported contacts will appear in the **Import Contacts** screen.
5. Tick the contacts you want to import, or click **Select All**.
6. Click **Import** to import the selected contacts.

If contacts are imported from an older version of Bp Premier, you may need to update any new fields in a contact record.

## Importing patient records

If a new patient signs up or a new doctor begins work at your practice, they may be able to bring electronic copies of their patient records from a previous practice.

If the previous practice used Best Practice software or Medical Director 3, and the files have been exported as XML files, you can import the patient record into your Bp Premier installation. XML files have the file extension '.xml'.

Files exported with the extension '.htm' or '.html' are HTML files that you view in an internet browser. You cannot import patient records in HTML into Bp Premier. You could print the pages from a browser and scan the printed copies into the new patient record, or you could ask the previous practice to provide XML versions of the patient record (only if the practice uses Bp or MD3).



**Important:** *If a patient already exists in Bp Premier before being imported, the patient record will be duplicated and you will have to merge the two records. See [Merging Patient Records on page 33](#).*

### Importing patients with custom preparations

From Lava Service Pace 1, custom preparations prescribed to patients will only be imported from an exported patient record if the **Site ID** of the patient record file and the Bp Premier server being imported into are the same. If a patient record is imported into a Bp Premier database with a different Site ID, custom preparations will not be imported.

## IMPORTING A SMALL NUMBER OF PATIENT RECORDS

Use this method when you only have one or two patient record files to import.

1. On Windows XP or Windows 7, go to Windows **Start > All Programs > Best Practice Software > Best Practice > Patient Import-Export**.

On Windows 8 and higher, click on the Windows flag icon in the bottom right, select the down arrow to view apps, and click on **Patient Import-Export** under **Best Practice Software**.

2. Log in using your username and password.
3. Click **Import Single Patient**.
4. Browse to the location of the patient XML and select the file you wish to import.
5. Bp Premier will check that the XML file is in the correct format. If any issues are found, a message will be displayed and an entry written to the *BPS Bulk Export Error.log* file with more information. The XML file may be in a format that Bp cannot import, or the file may have been edited or corrupted and contain errors.
6. If the file can be imported, Bp Premier will import the patient record and display a message to indicate that the patient has been successfully imported.
7. The patient will now appear in Bp Premier.
8. Repeat steps 3–5 for each individual record you want to import.
9. Click **Close** to close the **Patient Import-Export** utility.

## IMPORTING MULTIPLE PATIENT RECORDS

Use this method if you have an entire folder of patient records in XML format you wish to import into Bp Premier, for example, loaded onto a memory stick. There must be no other files in the folder.

1. On Windows XP or Windows 7, go to Windows **Start > All Programs > Best Practice Software > Best Practice > Patient Import-Export**.

On Windows 8 and higher, click on the Windows flag icon in the bottom right, select the down arrow to view apps, and click on **Patient Import-Export** under **Best Practice Software**.

2. Log in using your username and password.
3. Click **Import bulk patients**.
4. Browse to the folder containing the patients record to import. Click **OK**.
5. Bp Premier will check that all XML files in the folder are in the correct format. If any issues are found, a message will be displayed and an entry written to the *BPS Bulk Export Error.log* file with more information. The XML file may be in a format that Bp cannot import, or the file may have been edited or corrupted and contain errors.
6. Note down the name of any file that is not in a valid format. You will need to obtain a correct version of the file after the bulk import process and import the patient record individually.
7. At the end of the import process, a message will indicate how many patient records have been successfully imported.
8. Click **Close** to close the **Patient Import-Export** utility.

## Merging Patient Records

If your practice has converted to Bp Premier from a previous clinical application, you may have duplicate patient records present in the database. You can merge patient records from the **Patient list** screen.

To merge two patient records that have the same patient name, you select one record to keep, and one record to merge with the kept record and be removed from the database.

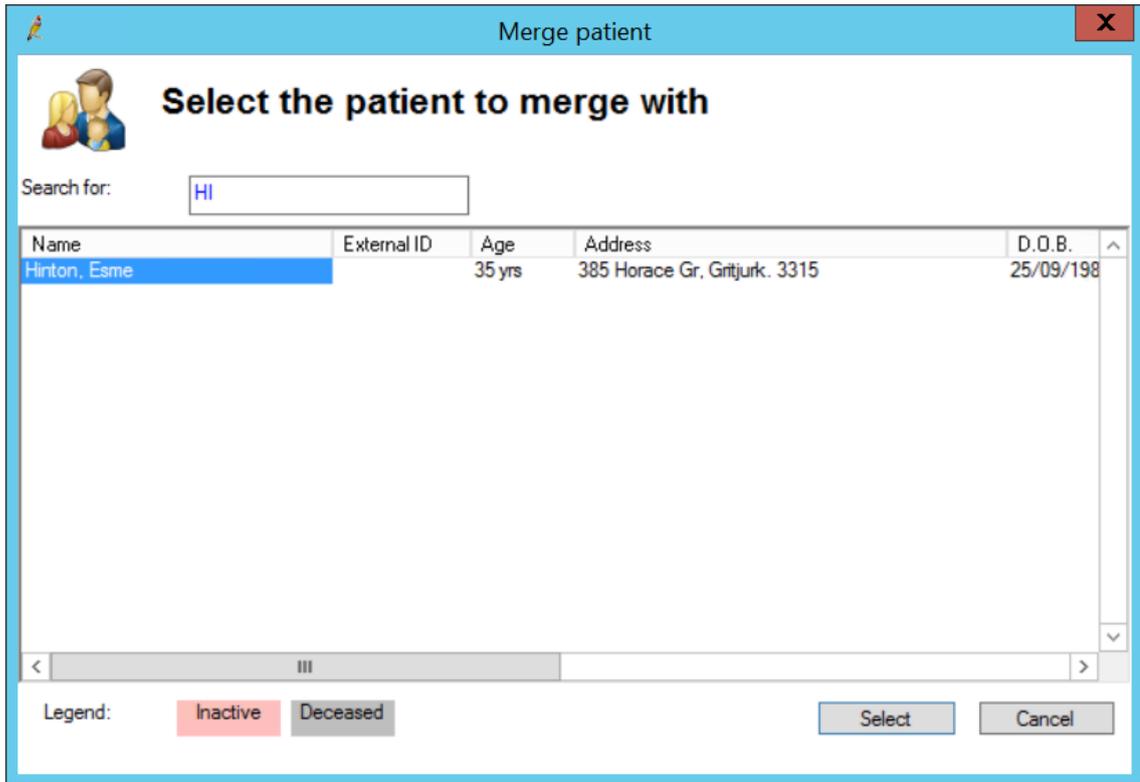


**Important:** *Merging patient records is permanent and cannot easily be reversed. User permission to merge patients should only be granted to senior practice staff.*

The merge process depends on whether your practice maintains a link to a third party billing package.

### MERGING PATIENTS IN AN UNLINKED BP PREMIER INSTALLATION

1. Select **View > Patients** from the main screen. The **Patient list** screen will appear.
2. Search for the patient by surname, firstname. Both records should be listed in the patient list. The records will have the same name and details.
3. Select the patient record that you want to keep.
4. Select **Edit > Merge** from the menu. If the **Merge** option is not available, speak to your system administrator to have the user permission added.
5. Read the **Merge Patients** warning prompt that appears. If you are sure you have the right patient, click **Yes**.
6. Search for the patient to merge by surname. The patient selected here will be merged with the first patient and the record removed from the database.



Name	External ID	Age	Address	D.O.B.
Hinton, Esmé		35 yrs	385 Horace Gr, Gritjurk. 3315	25/09/198

7. Select the patient and click **Select**.
8. The second patient record will now be removed and any notes, results, documents, and patient data recorded for the patient will be moved to the patient selected in step 3.

## MERGING PATIENTS WHEN LINKED TO A THIRD PARTY BILLING PACKAGE

### Adjust the patient file to identify which record is linked to Bp

This step requires you to edit the **patients** file in a linked installation. See **Linking to a third party billing package** in the Bp Premier Knowledge Base for more information.

1. Open the patients file in the billing package.
2. Adjust the patient street demographic. For example, change 'St' to 'Street', or some minor, easily identifiable change.
3. Allow the changes to be updated to Bp Premier. This can take up to 1 minute.
4. Open the duplicate records in Bp Premier to identify which record has been updated by the change. The updated record will be the 'kept' record when you merge in the next step. If the other record has not been updated by the change, it is 'unlinked' and can safely be merged.



**Important:** If a duplicate patient record exists in the billing package, then a matched record should exist in Bp. Do **not** proceed. Contact your billing package vendor to discuss duplicated records in the billing package prior to revisiting this procedure.

### Merge the unlinked duplicate to the linked patient record

1. Select **View > Patients** from the main screen. The **Patient list** screen will appear.
2. Search for the patient by surname, firstname. Both linked and unlinked records should be listed in the patient list.
3. Select the linked patient record.
4. Select **Edit > Merge** from the menu. If the **Merge** option is not available, speak to your system administrator to have the user permission added.
5. Read the **Merge Patients** warning prompt that appears. If you are sure you have the right patient, click **Yes**.
6. Search for the unlinked patient record. Select the patient and click **Select**.
7. The unlinked patient record will be removed and any notes, results, documents, and patient data recorded for the patient will be moved to the patient selected in step 3.

## Backing up and restoring Bp Premier

Best Practice Software recommend that you back up your Best Practice data daily using the supplied utility **BP Backup**, even if you use a third-party backup utility. BP Backup provides the simplest restore of the database. Best Practice Software Support staff can assist you with backing up and restoring the database through BP Backup, but may be unable to assist with restoring a database through third-party backup software.

Best Practice also recommend that a test restore of the backup is performed to a separate server on a regular basis to ensure that your backups are valid and can be restored. Store backups off-site in a secure location.

You can manually back up the database at any time, but it is better practice to set up a scheduled backup to run overnight or during a time of minimal server activity.

If you are experiencing problems with the backup process, see [Troubleshooting backups on page 41](#).

**Note:** Users performing backup and restore operations will require some or all of the **Configuration, Perform a backup, and Perform a restore permissions set to 'Allow access'**.

## PERFORMING A MANUAL BACKUP

1. Log into Windows on the Bp Premier server as a Windows Administrator user.
2. On Windows 8 or later, select the Windows logo in the bottom left > **Apps** > **BP Backup**.

On Windows 7 or earlier, select **Start** > **Programs** > **Best Practice Software** > **Best Practice** > **BP Backup**.

3. The **BPS Backup Utility** screen will appear. Click **Backup database**. Enter the username and password of a Bp Premier user with the permission **Perform a backup** set to 'Allowed'. A file explorer will open.
4. Browse to the folder you want the Best Practice Software backup file to be stored.
5. From the **Save as type** drop-down, select the type of compression. This step is optional.

A compressed backup creates one zip file containing a file for each Best Practice database and requires free space on the Bp Premier hard disk at least three times the size of the database, to allow creation of temporary files.

An uncompressed backup creates one file for each Best Practice database.

6. Click **Save**. The filename will default to a timestamp format, for example, 'BP\_20080513105335'.

After the backup has completed, BP Backup will notify the success or failure of the backup. Best Practice Software recommend that you copy or move the backup files to an external device that can be stored in an off-site location.

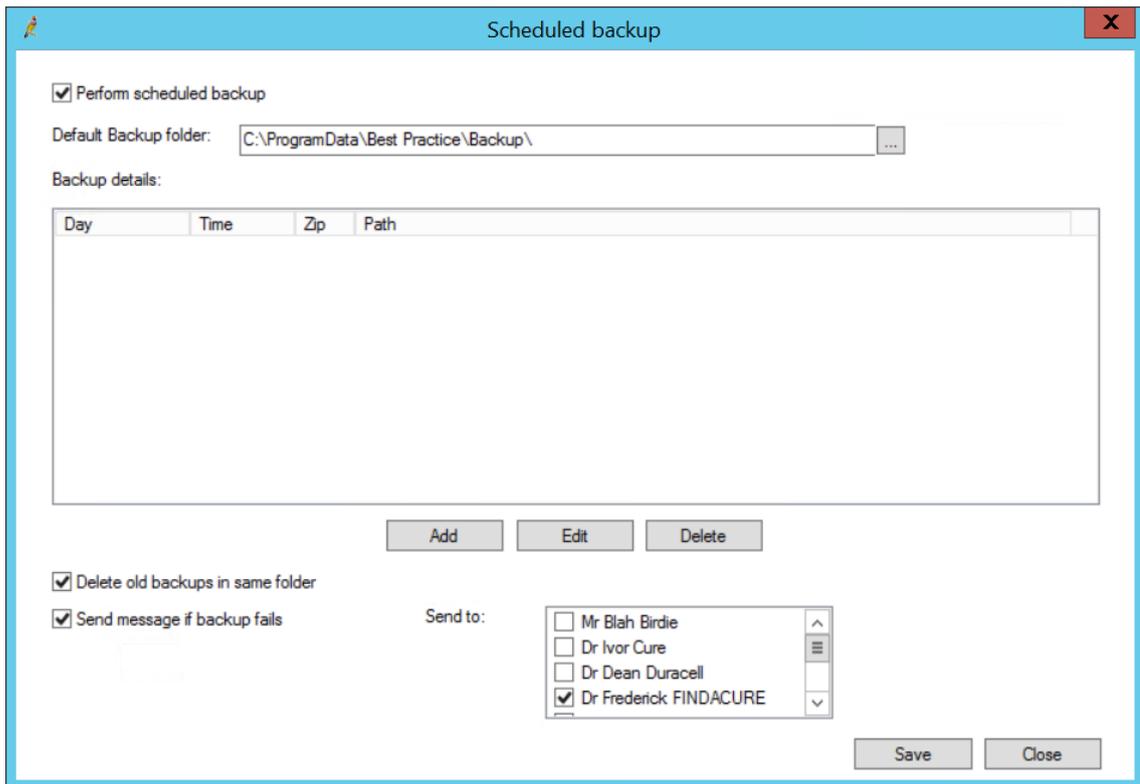
## SCHEDULING A BACKUP

Scheduled backups allow you to back up Bp Premier data while the system is unattended, and schedule a backup several times a week or on the same day (a lunchtime and evening backup, for example).



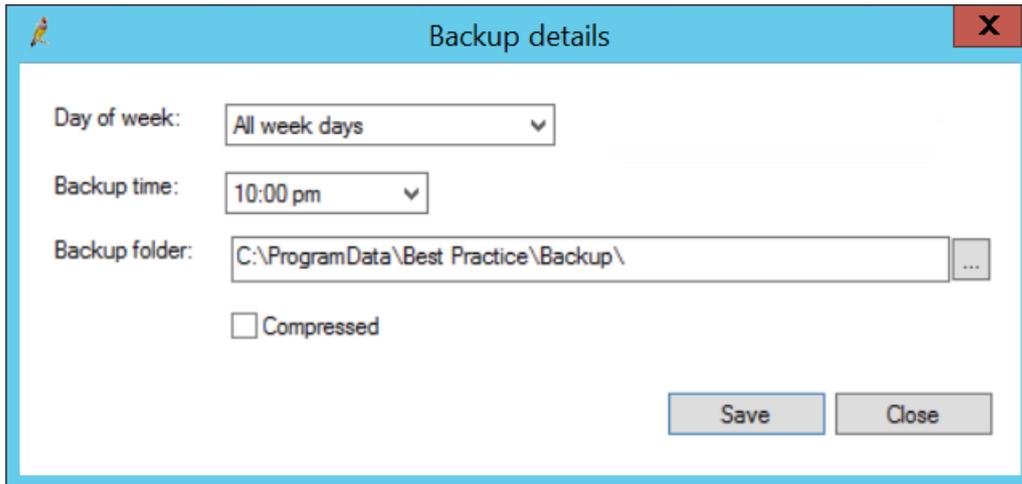
**Important:** Prior to Bp Premier version Lava, scheduled backups were configured through the Bp Link utility. If you have upgraded to Lava, Best Practice Software recommend running scheduled backups through the Bp Service instead. See **Configuring Bp Link as part of the BpService** in the Bp Premier Knowledge Base for more information.

1. Select **Setup > Configuration > Bp Service** tab.
2. Click **Configure Automated backup**. The **Scheduled backup** screen will appear.



Day	Time	Zip	Path
-----	------	-----	------

3. Tick **Perform scheduled backup**.
4. Set a **Default backup folder** to store backup files in. You can override this setting when you create a schedule.
5. Click **Add** to add a new schedule. The **Backup details** screen will appear.



6. Select the **Days of week** to run the backup.
7. Select the **Backup time** to run the backup.
8. Select the **Backup folder** to store the backup files. Ensure the hard disk has enough space for the backup process and files. If you are running an uncompressed backup and the backup folder is on a network, you must use a mapped drive. UNC paths are not supported.
9. Select **Compressed** to run a compressed backup. Compressed backups require free space on the Bp Premier hard disk at least three times the size of the database.

***Note:** Ensure that the destination directory for backups has permissions set to allow read/write/delete. Set the permissions level to 'full control' for the 'network service' user-name. Your IT support can assist.*

10. Click **Save** to return to the **Scheduled backup** screen.
11. If you do not wish to keep old backup files, tick the checkbox **Delete old backups in the same folder**.
12. Tick **Send message if backup fails** and select one or more Bp Premier users if you want staff notified if a backup fails.
13. Click **Save** to exit.

## RESTORING THE DATABASE

1. Log all users out of Best Practice. Restoration will replace all existing data.
2. Log into Windows on the Bp Premier server as a Windows Administrator user.



***Important:** When restoring, **always** log in to the Bp server on the local machine or through a console connection. If you attempt to restore the database through a Remote Desktop session, Bp Premier will return an SQL error and will not restore.*

3. On Windows 8 or later, select the Windows logo in the bottom left > **Apps** > **BP Backup**.

On Windows 7 or earlier, select **Start** > **Programs** > **Best Practice Software** > **Best Practice** > **BP Backup**.

4. The **BPS Backup Utility** screen will appear. Click **Restore database**. A file explorer will open.
5. Browse to the folder where the backup file is stored that you wish to restore.
6. Select the file to restore and click **Save**. The restore process will begin.

## BACKING UP AND RESTORING INDIVIDUAL DATABASES

You can back up and restore an individual database on the Bp Premier server only by using **sqlcmd** at the command prompt screen.

To use **sqlcmd**, you will need to set up your bpsviewer account password. You may need to reapply your database browser password if you have recently upgraded, because the BPSBackup account may not yet be associated with the correct password.

The following are two examples of using sqlcmd:

Back up the active BPSPatients database:

```
sqlcmd -U BPSBackup -P <pwd> -S \BPSINSTANCE -Q "BACKUP DATABASE <database> TO DISK=
='<path>'"
```

Restore a backed-up BPSPatients database:

```
sqlcmd -U BPSBackup -P <bp pwd> -S \BPSINSTANCE -Q "RESTORE DATABASE <database>
FROM DISK='<path>' WITH REPLACE"
```

where:

- <pwd> = the bpsviewer account password
- <database> = the name of the database
- <path> = the path and filename of the backup or restore file.

For example:

```
sqlcmd -U BPSBackup -P password123 -S \BPSINSTANCE -Q "BACKUP DATABASE BPSPATIENTS
TO DISK='c:\backups\bpspatients.bak'"
```

## 3RD PARTY BACKUPS

Third-party backups are not supported by Best Practice Support. The Best Practice support team are unable to provide comprehensive support to sites trying to recover a backup performed by a third-party product.

When using a third-party backup software that has an SQL agent, the user details required to access the database are set in Setup > Configuration > Database:

User: BPSBackup

Password: See **Accessing the database through the 'viewer' account** in the Bp Premier Knowledge Base for more information.



**Important:** Do not lose the password that you set for this account, because it cannot be reset. Store the password in a secure location such as the practice safe.

## Troubleshooting backups

The following steps address some common problems encountered when backing up the Bp Premier database.

Best Practice Software recommend that you:

- back up your Bp Premier data at least daily
- store backup files off-site in a secure location
- test restores of backup data to a test server at least monthly.

The source of failed backups often includes:

- Lack of disk space on c:\ drive
- No permission within Windows to write files to the destination drive
- Issues with corrupt storage media (for example, damaged DVDs).

### Identifying if the backup has worked

1. Check the backup log.

Each time a backup is performed, a record is written to the log file *BPSBackup.log*. This file can be found in the folder:

- Windows 2000, XP, or 2003 Server — C:\Documents and Settings\All Users\Application Data\Best Practice\Log
- Windows Vista, Windows 7 or 2008 Server — C:\ProgramData\Best Practice\Log.

This log contains a record for each backup, whether it was successful or not, and if the backup was compressed or uncompressed.

Examples of log file entries include:

```
*****  
  
Date: 10/12/2009 Time: 12:19:44  
  
Backing up to H:\, Compressed  
  
Backup failed - There is not enough free space on the destination drive for this backup!  
  
*****
```

Date: 10/12/2009 Time: 12:22:55

Backing up to H:\, Compressed

Backed up to H:\BP20091210122218.zip

\*\*\*\*\*

Date: 10/12/2009 Time: 12:39:27

Backing up to H:\, Uncompressed

Backed up to H:\BP20091210123908.bku

2. Check that the files have been created on the destination drive.

The backup log lists the location in which the backup files were created. Browse to this folder to ensure that the backup files exist.

### To check the size of your database

1. Log in the Bp Premier server and go to **Help > About > System info**. The **Server data path** shows the location of your data.
2. Browse to this folder, right-click on the folder name and check the properties. You will need approximately three times this size free on the hard drive on which the database is installed.
3. If the hard disk on the server is short of disk space, consider an uncompressed backup, or backing up to a network location.

### Restoring to a test server

It is good practice to perform a restore of the backup on a test server. This is recommended because backup media is often damaged in transit.

Test servers have two benefits: you can regularly test that your backups are working, and also provide a fallback should your main server fail. If the practice has only a few users, you may be able to use a medium specification PC as a test server. However, at larger practices, you would require a higher specification for the PC or even a true server machine.

Install Bp Premier on the test server with the same version as the live server, and upgrade the test server each time a drug and data update and program update are released. The test server also **must** have the same SQL version as the live server.

Discuss your backup process with your IT support company when you are discussing your disaster recovery plan.

### Compressed and uncompressed backups

Compressed backup pros:

- creates a single zip file containing a file for each Best Practice database
- this one file ensures that you have the entire backup in one simple file no chance of missing data

Compressed backup cons:

- much slower than uncompressed backups
- requires plenty of free space on C:\drive of the server to create temporary files during the zipping process.

Uncompressed backup pros:

- Much quicker than compressed backup
- Good to use if you have limited disk space on c:\drive

Uncompressed backup cons:

- creates one file for each Best Practice database so have to ensure that all files are stored together in case a restore is required