Best Practice
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Indigo

Bp Premier Clinical Setup Guide

Indigo

Legal notices

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Last updated: April 2019

Intended for usage with Bp Premier version Indigo and later. Some features in this User Manual may be available only in versions later than Indigo.

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

Set up the Clinical module

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

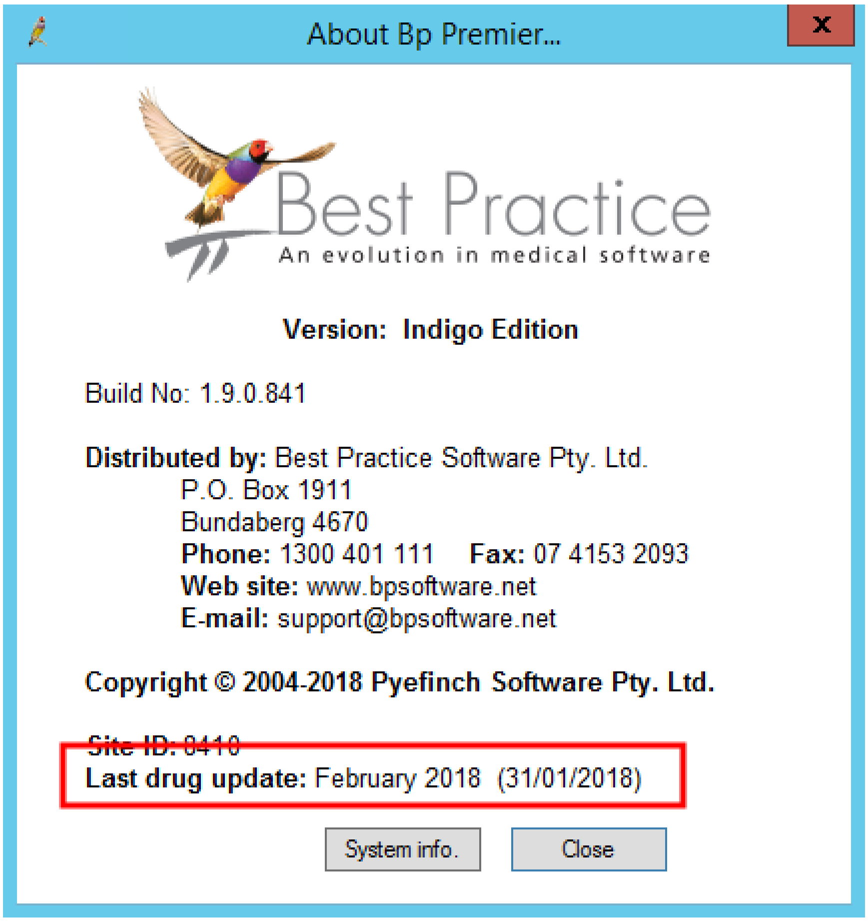
Before you begin

1. 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.
2. log in to Bp Premier on the server and each workstation to confirm the connection to the Bp Premier server.

Complete each setup procedure in sequence.

Update the drug database

Check that you have the latest drug database version installed. Select **Help** > **About**. The **About Bp Premier** screen will appear.



The last drug database version is shown in the **Last drug update** field. Check this date against the data update section of our website www.bpsoftware.net. If any newer data updates are available, download them in chronological order and install to the server only.

Select **Help** > **About** again to ensure that the updated version is now shown.

Enter practice details

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

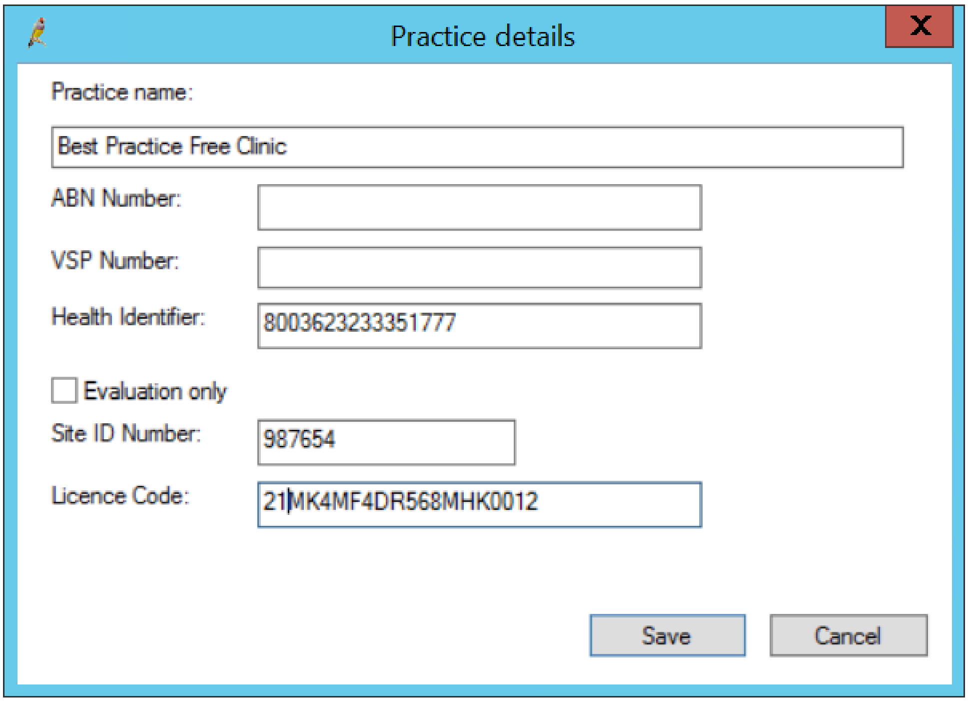
If you are starting from an empty database, you are prompted to enter the practice details when you first log in to Bp Premier.

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

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

To add practice details:

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

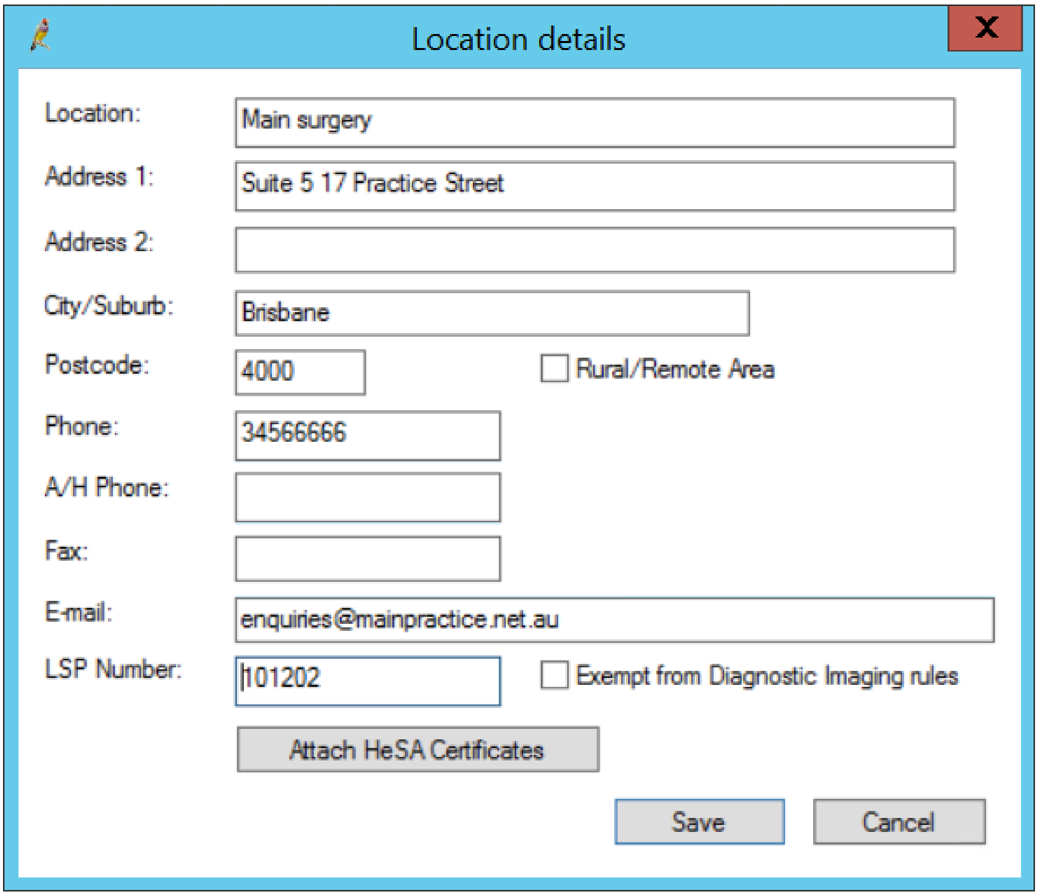


3. Update any details and click **Save**.

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

To add a location:

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



3. Complete the details for this location and click **Save:**
   - The **Rural / Remote area** checkbox controls which Medicare incentive is added to bulk-billed invoices for pensioners, health care card recipients, and children. If unticked, incentive '10990' is used; if ticked, '10991' is used.
   - **LSP Number** is the Location Specific Practice Number used when practices provide diagnostic imaging services or radiation oncology services.
   - The **Exempt from Diagnostic Imaging rules** checkbox is used in remote areas where Diagnostic Imaging Services are provided and the practice is exempt from the claiming rules.

To delete a location:

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

To restore a deleted location:

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

Set up results and secure messaging import

1. Set up **Results Import options** for importing pathology and radiology results as described in Set up results importing on page 14.
2. Configure Pathology and Radiology forms as described in Set up radiology forms on page 12 and Set up pathology request forms on page 9.
3. Set up **Messaging Providers** for secure messaging and electronic referrals (if required at your practice).
4. Start the Windows Service Bp Service.

   Bp Service checks periodically for results and patient demographic changes waiting to be processed, and also runs any configured scheduled backups. When run the first time, a bird icon will appear in the system tray.

Note: *Terminal Server sessions will not run BP service. You must start Bp Service from the Bp Premier server to enable automatic linking to billing, pathology import, and Bp Premier scheduled backups to occur.*

Review user settings

1. Check user permissions for all users to ensure they have appropriate access.
2. Give one trusted user full permissions and store the password for this user in a fireproof safe for emergency access.
3. Log each user into their workstation to:
   - Configure their preferences — **Setup** > **Preferences**
   - Configure their printers — **Setup** > **Configuration** > **Printers**
   - Update their password — **Setup** > **Users**.

Update standard lists

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

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

tice.

8. Click **Save** to save your configuration changes.

Configure Bp Premier Email (optional)

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

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

Configure Bp Premier Messages

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

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

Enter patient demographics

If the practice did not convert from another clinical package, you will need to input your patient demographic information by selecting **File** > **Open Patient** > **Add new**. You can also import patient records from another Bp Premier database.

Add Contacts

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

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

Configure Bulk Document Import

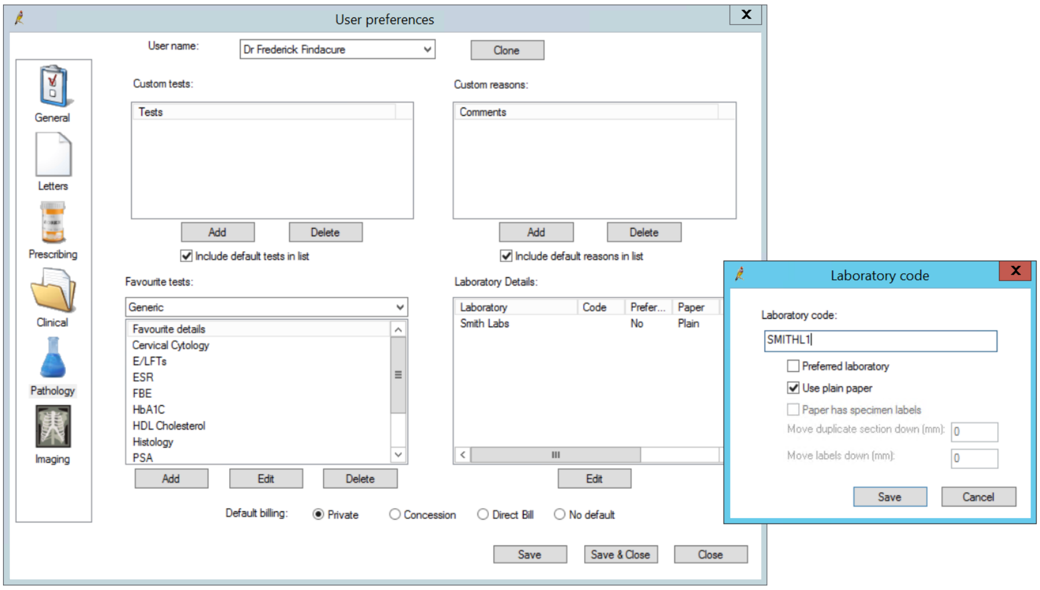
Bp Premier provides a Bulk Document Import utility for bulk scanning or importing documents. Configure this utility for each user who will be importing documents. The BDI tool is external to Bp Premier. To open the tool, click on the Windows flag icon in the bottom right, select the down arrow to view apps, and click on **Bulk Document Import** under **Best Practice Software**.

Set up pathology request forms

This article describes how to indicate in a provider's preferences whether a laboratory will use pre-printed stationery or plain paper.

Set a laboratory's request paper type

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



3. Complete the fields in this screen:

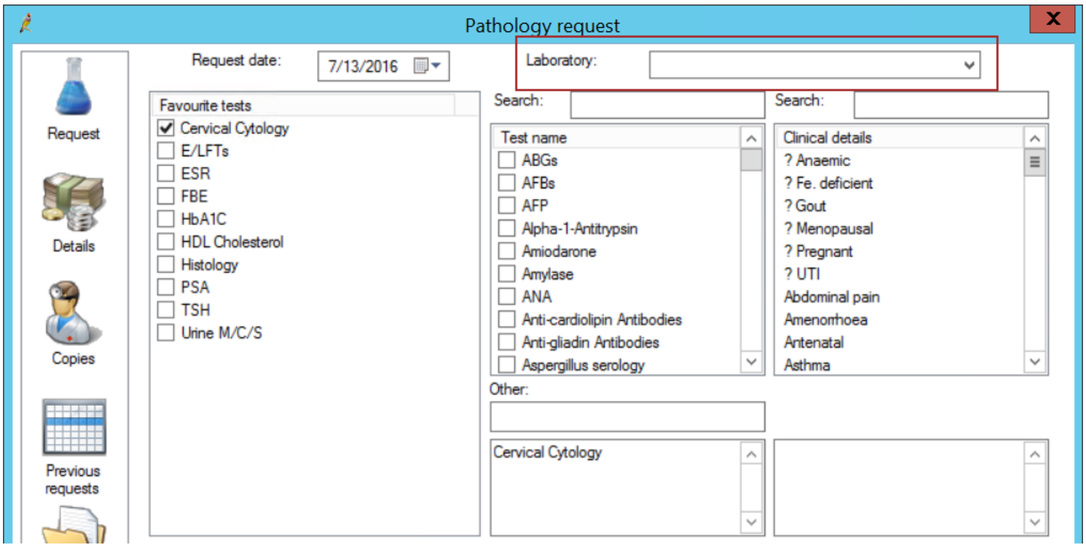
Field	Description
Laboratory code	If you are using pre-printed forms, enter the code for pathology form. The patient information will print in the correct places on the pre-printed form. Contact the pathology lab for the code.
Preferred laboratory	Tick this box if this laboratory is the user's preferred laboratory. When the user creates a pathology request from the patient record, the request will default to this pathology lab.
Use plain paper	Tick this box if the laboratory does not provide pre-printed stationery.

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

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

Print a pathology form

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



Plain Paper Form

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

Pre-printed Form

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

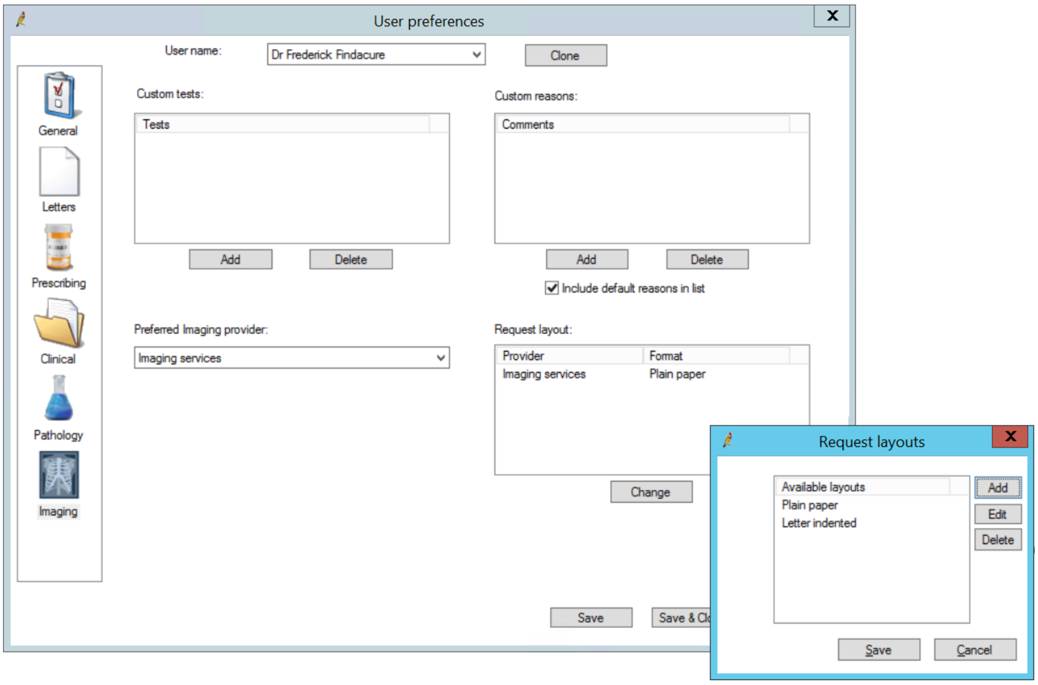
Set up radiology forms

This article describes how to create a template to use for radiology requests.

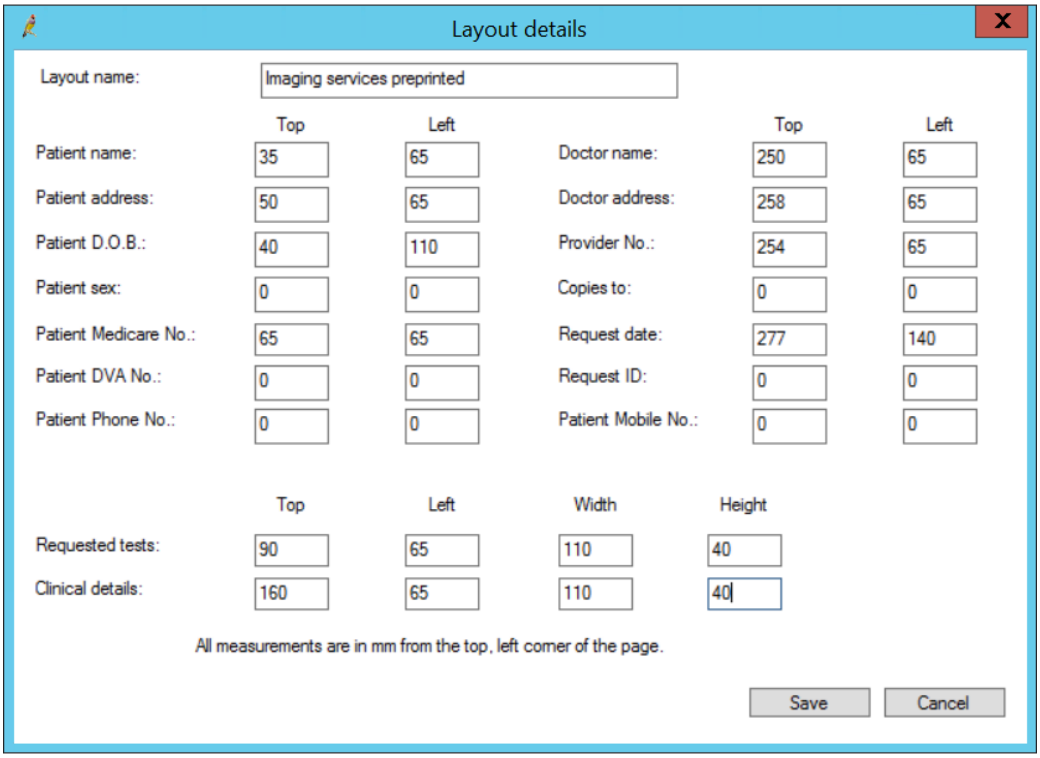
Unlike pathology forms, there is no standard radiology request form. You can assign a single request layout to more than one imaging laboratory.

Create a radiology request layout

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



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



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

Set up results importing

This article describes how to set up import of pathology and radiology results and electronic documents received through third party messaging providers. You can set up more than one third party provider for this purpose.

How results are imported

Divert different labs to different folders

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

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

Import results

There are two ways of importing results into Bp Premier:

1. Set up Bp Premier to automatically import results on the server. Bp Service will check every five minutes to see if there are any results and reports in any of the folders indicated in the **Report file search paths**, and if found will import them into Bp Premier.
2. Select **View** > **Incoming Reports** from the main Bp Premier screen. This will force an import of any results and reports found in any of the folders indicated in the **Report file search paths**.

Matching patients and users to results

- If the system can match the result to a patient and a doctor the results will appear automatically in the Doctor’s Inbox.
- If results cannot be matched to a patient and/or doctor they will remain in the **View** > **Incoming** screen and will need to be matched manually.

Failed result imports

If Bp Premier fails to successfully import a result file three times, on the third attempt an internal message is sent to the practice manager stating the import filename, the machine on which the import failed, and the sending facility (if known). If there is no practice manager user recorded, Bp Premier will message active principal doctors.

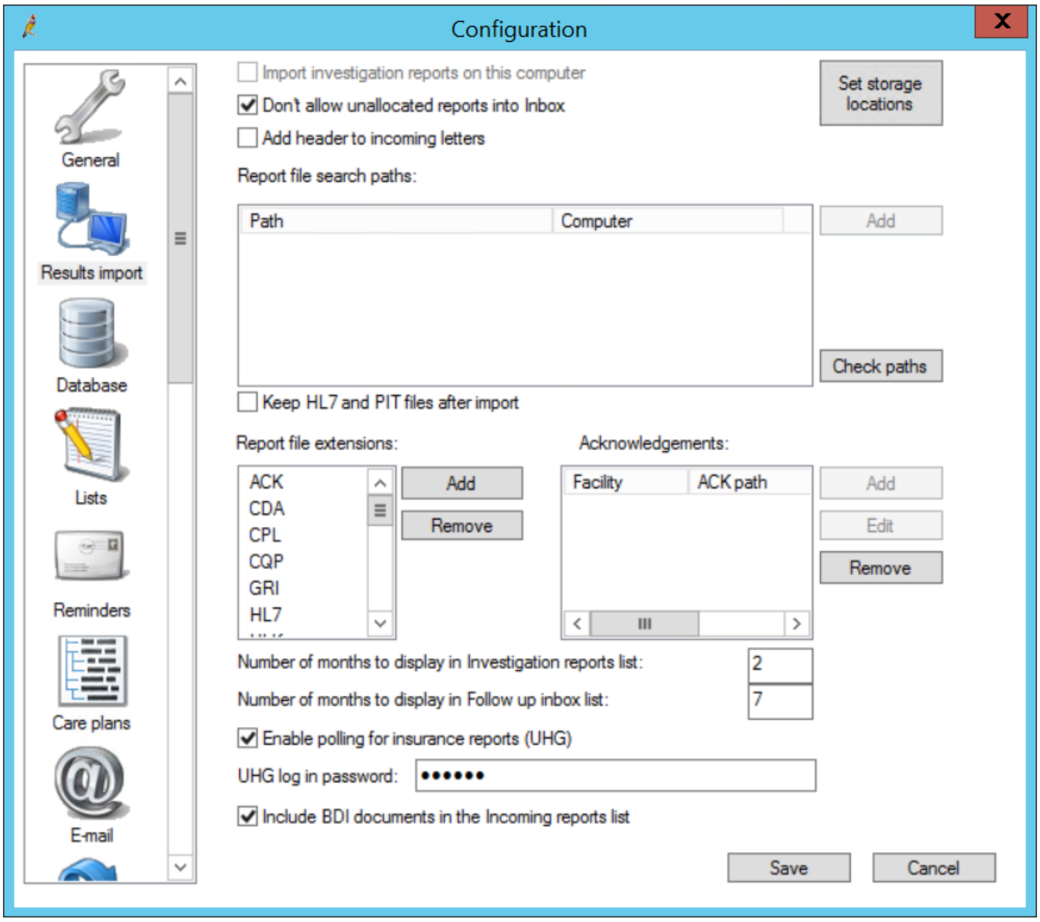
Result files that fail to import are moved to C:\ProgramData\Best Practice\Unprocessed. ‘C:\ProgramData’ depends on the version of Windows.

Set up results importing

Perform the following procedure on the server or workstation you will use to receive incoming results. This is usually but not necessarily the Bp Premier server.

Enable results import

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



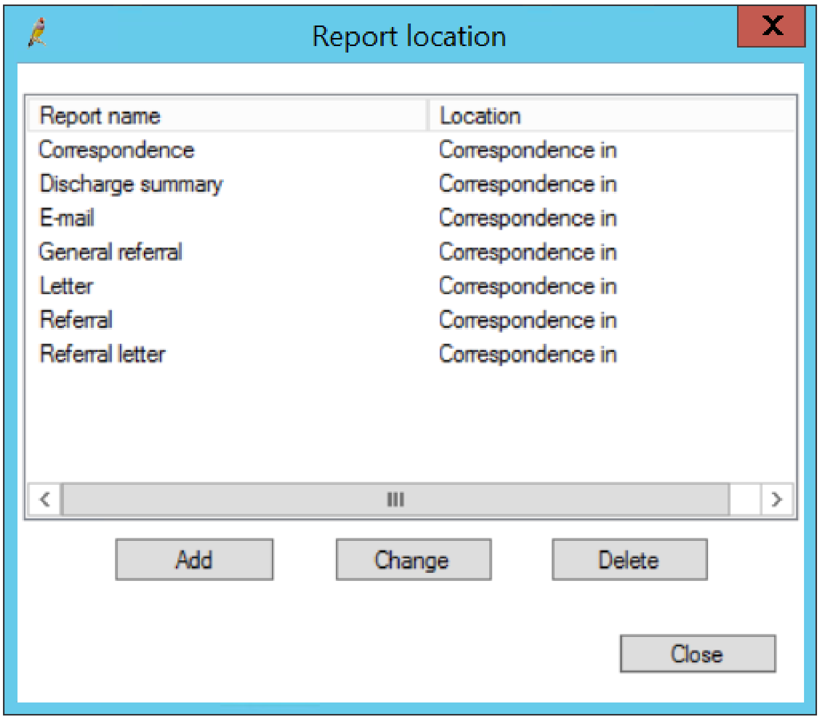
2. Set the following fields:

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

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

Set default storage locations

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



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

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

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

Add download paths

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

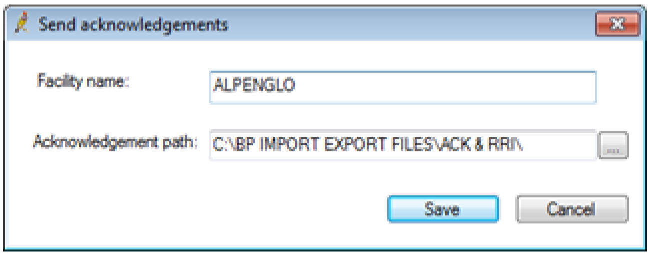
Field	Description
Keep HL7 and PIT files after import	Only tick this box if advised to do so by General Products Support to diagnose an issue with importing reports.
Report file extensions	Most labs will use the standard extension for their results file. However, additional file extensions can be added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

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

Set up results acknowledgement

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

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



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

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

There are two types of acknowledgement files:

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

Set up a messaging provider

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

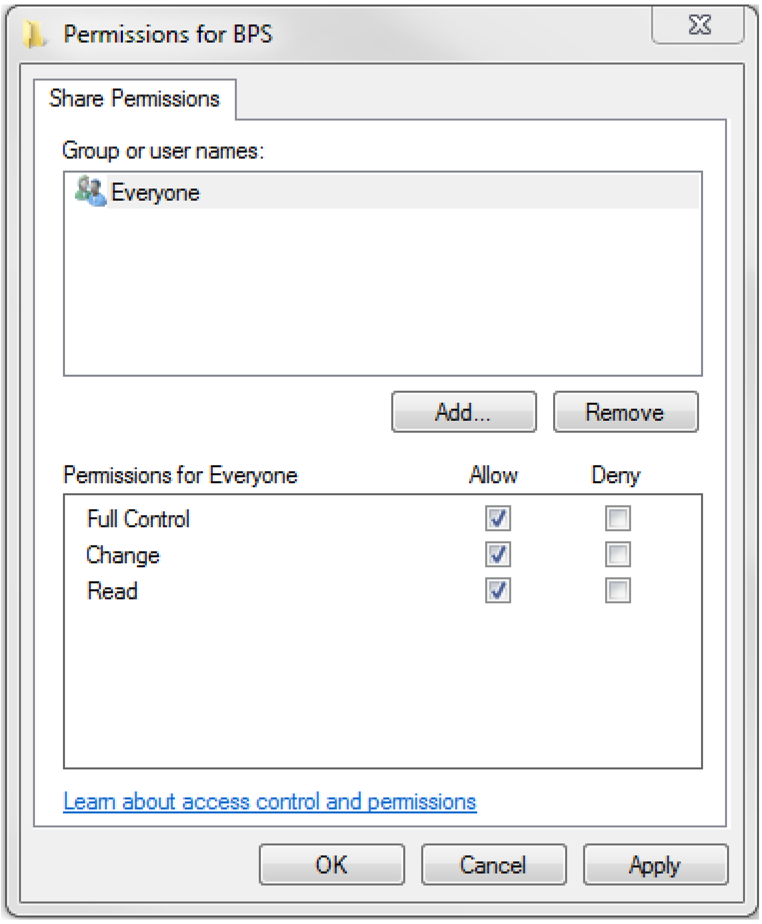
Before you begin

Check with each messaging provider your practice uses to identify the folder that the software will download documents to (Incoming) and retrieve documents from (Outgoing). Write the folder locations down; you will need to select the folders when setting up messaging.

Share the outgoing folder

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

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

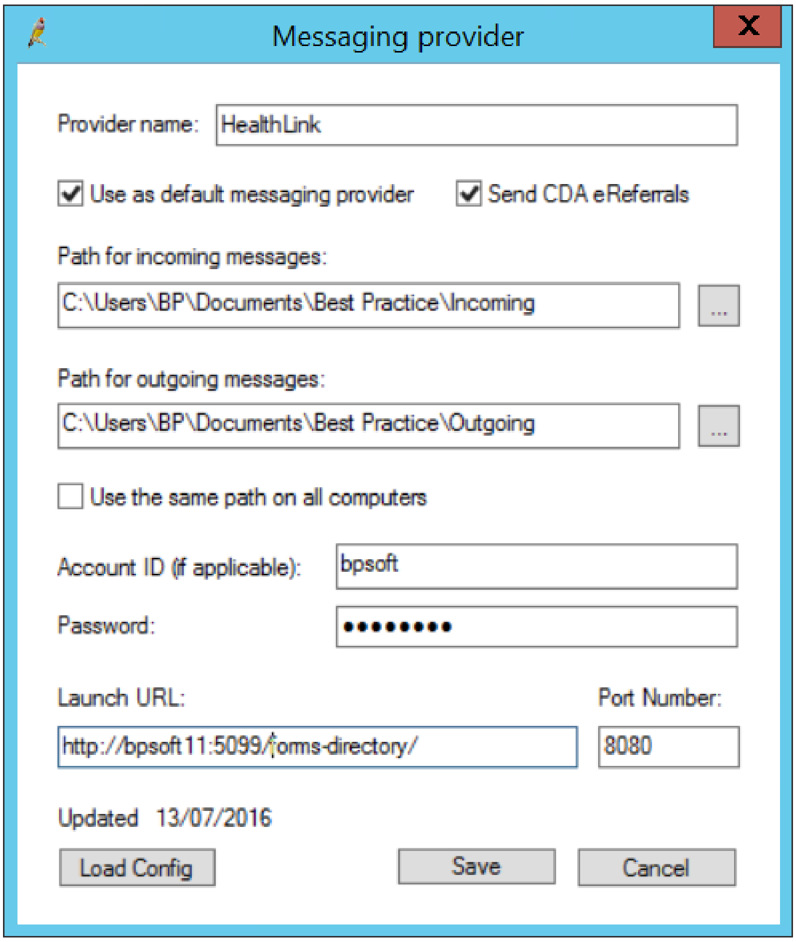


2. Click on **Advanced Sharing**, tick **Share this folder**, click on **Permissions**, select the user group **Everyone** and set **Full Control** to allowed.
3. Click **OK** to close the **Properties** screen.

Set up your messaging provider

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

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



3. Complete the fields in the screen.

Field	Description
Provider Name	Name of the messaging provider
Path for incoming messages	Location for the incoming messages. This can be either the local path or the UNC path.
Path for outgoing messages	Location for the outgoing messages. The outgoing path must be different to the incoming messages path. ***Note:*** *The path for outgoing messages must be the UNC path for the folder, so that users on workstations can access this folder across the network. An example of a UNC path is '\\server\messagingprovider\out'.*

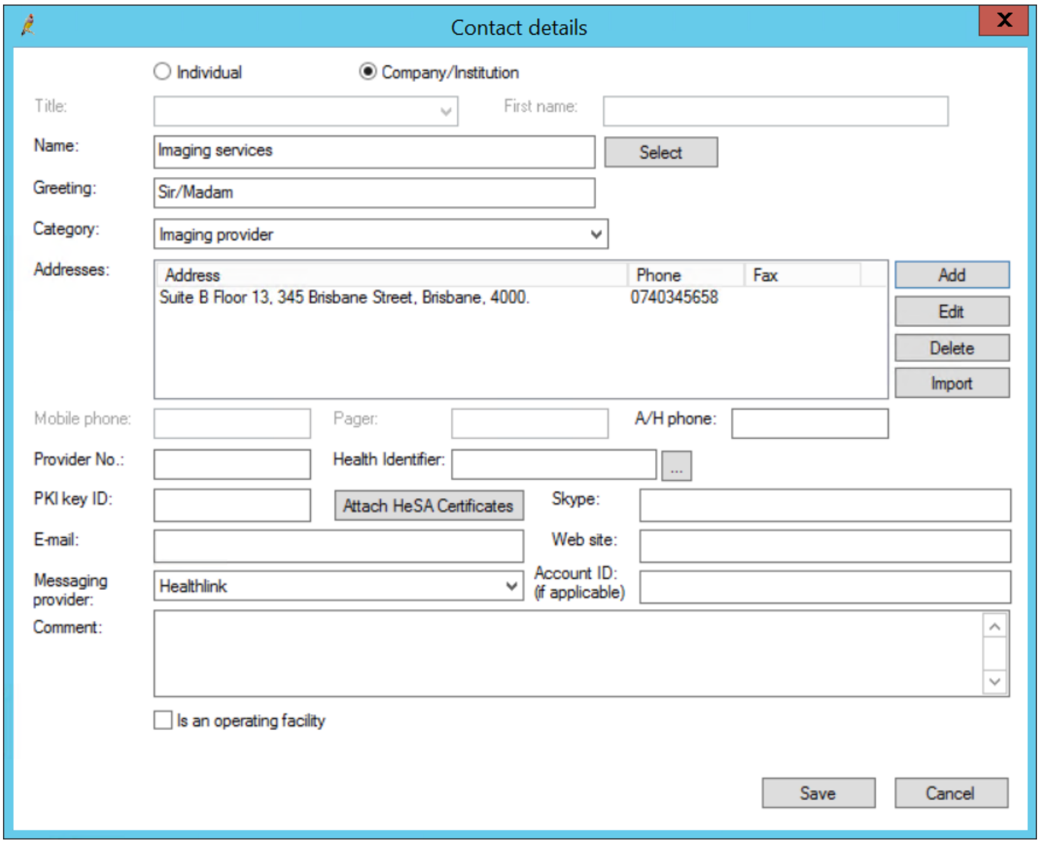
Field	Description
Use the same path for all computers	Tick this field so that this setting applies to all users.
Account ID	Account ID for this messaging provider (if applicable).
Send CDA eReferrals	Tick if your messaging provider has the functionality to transmit CDA format eReferrals. The messaging provider's user documentation or support will be able to tell you if CDA is supported.
Use as default messaging provider	Tick if this is your primary messaging provider. The messaging provider will be used if the contact you are sending a document to cannot accept eReferrals or does not have a preferred messaging provider.
Launch URL	If you are setting up an eReferral provider, for example, HealthLink, you may have been provided with a URL to enter into the Launch URL field. Enter only if applicable.
Port Number	The Port Number field works in conjunction with the Launch URL for eReferral providers. Enter only if applicable.

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

Add contacts

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

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



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

Import bulk clinical documents

The Bulk Document Import utility (BDI) tool can:

- Import document files in all popular formats: photos, images, PDF, MS Word documents (.doc and .docx), RTF, .txt, HTML files
- Import scanned documents using a local or network scanner
- Import photos directly from a digital camera.

The BDI tool does not require interaction through the Bp Premier user interface. BDI is a separate utility with the following advantages:

- Users do not require access to the patient clinical record
- Documents and images can be stored in any provider's Inbox or directly into the patient record
- Documents and images can be stored in the BDI utility until staff are ready to allocate them.

Note: *BDI storage of images is a practice-wide holding area, not user-specific. All documents scanned to the general Inbox will be visible to all users until processed.*

Using the BDI tool

Using the BDI tool is a three-step process:

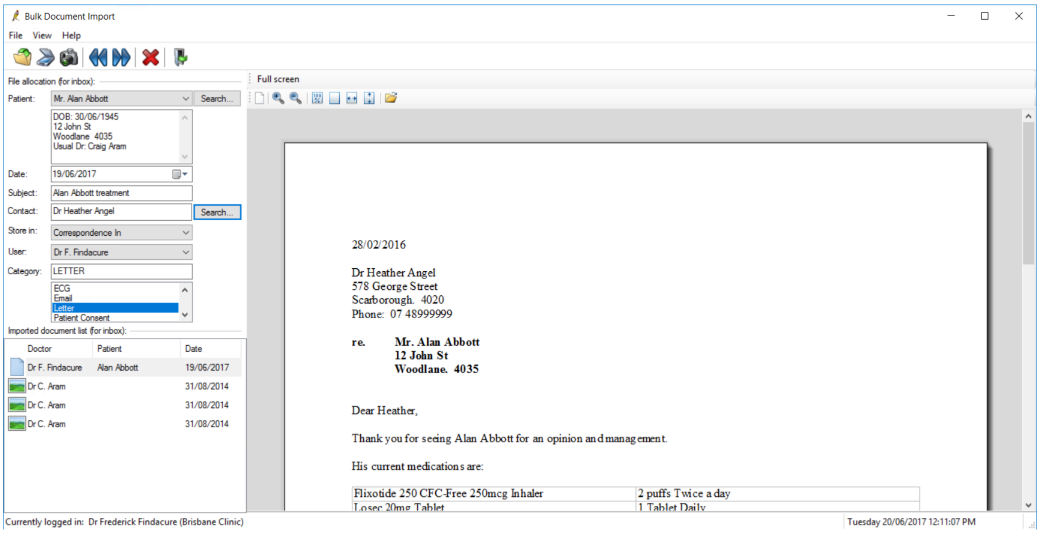
1. Import the documents from file, scanner, or camera.
2. Edit the image. This step is optional, but allows you to optimise imported documents for your practice.
3. Send the documents to a provider's Inbox, or send to a patient record.

1. On Windows 7, go to Windows **Start** > **All Programs** > **Best Practice Software** > **Best Practice** > **Bulk Document Import**

   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 **Bulk Document Import** under **Best Practice Software**.

2. Enter your Bp Premier username and password into the login prompt. The **Bulk Document**

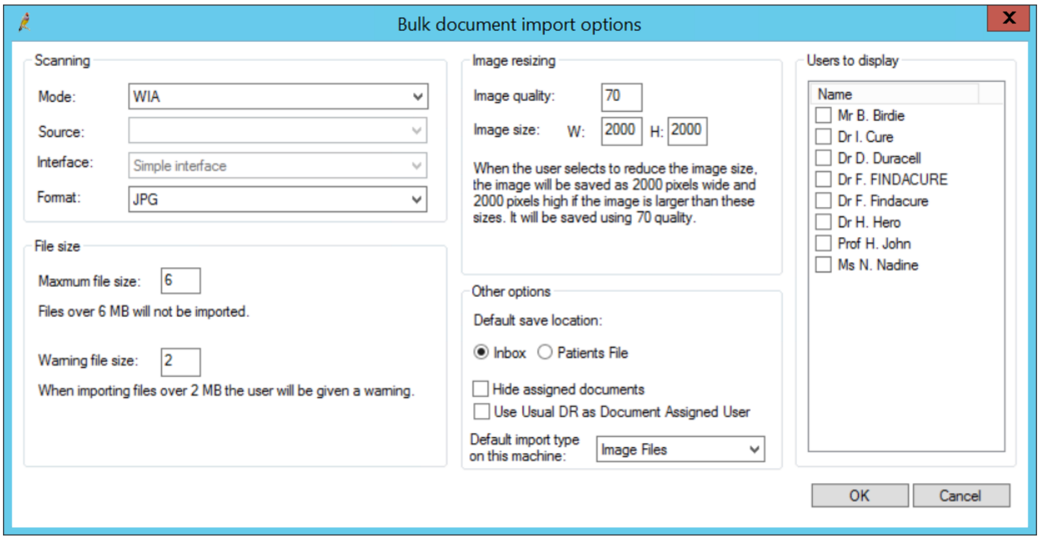
Import screen will appear.



Set up the BDI tool

Before using the utility for the first time, users should configure the import options to suit your practice's workflow and scanning device. BDI settings are specific to the logged-in user, not system-wide.

1. Select **File** > **Options**. The **Bulk document import options** screen will be displayed.



The following settings can be configured:

Field	Description
Mode	Depends on the type of scanner: 'Twain' or 'WIA'. Consult your scanner documentation if you are unsure of which type is your scanner.
Source	Scanner to use as the source for scanned images. The scanner can be connected to the computer you are running BDI from, or any scanner connected to the same network.
Interface	The 'Simple interface' option uses Bp Premier' interface for scanning documents. The 'Manufacturer's interface' option uses the manufacturer's scanning software, which may feature more options.
Format	The file format in which to save scanned documents.
File size	You can set the maximum size scanned image file that Bp Premier will accept, and a warning file size. If the file size is within the maximum file size limit but exceeds the warning file size, a **Reduce size** button appears. The user can reduce the file size using the **Image resizing** settings. Scanned files over the maximum file size can not be saved. Default settings are 6MB for a maximum file size and 2MB for a warning file size.
Image resizing	These settings are used in conjunction with the **File size** settings. The higher the **Image quality** value, the larger the file size. If the document can be reduced in width and height without sacrificing image quality, use the **Image size** dimensions in pixels to rescale the image.
Default Save Location	Indicates whether documents are saved to the provider's Inbox or the patient file by default.
Hide assigned Documents	Specifies whether already allocated documents are omitted from the **Imported document list (for inbox)** in the BDI utility. Ticking this option can make managing documents easier during an import, because the Imported document list will only show documents you haven't allocated yet.
Default import type on this machine	Specifies the default file type to look for when browsing for files to import into the BDI utility.

Field	Description
Users to display	Specifies which users are available in the **User** drop down list when allocating an imported or scanned document.

Zoom size preference

To set the default zoom size preference in the document viewer, view a document and set the **zoom %** to a setting that suits your screen size. Right-click in the main part of the document viewer screen and select **Set current view as default**.

Import from file

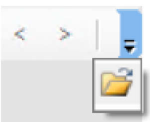
Use **Import from file** when you have documents that are saved or scanned externally to Bp Premier that you wish to import. The supported image types are JPG, TIF, TIFF, BMP, PNG, EXIF, RAW, JFIF, GIF, PMP, PDF, RTF, DOC, DOCX, TXT, and HTML file.

1. Click the **Import document** button  or select **File** > **Import from File**. The **Open** screen will be displayed.
2. Browse to the file or files you want to import. The **Default Import Type** configuration setting determines the default **Files of type** shown. Change the files of type shown if you need to.
3. Select the files you want to import. Use CTRL+ and SHIFT+ click to select multiple files. Click **Open**. The **Import new files screen** screen will appear.
4. You can now view and edit the imported image.

Importing secured PDF files

If you attempt to import a PDF file that has been secured with a password, Bp Premier will warn that you must open the file in an external viewer, print, and scan the file to import. You could also remove the password protection from the secure PDF, if the password is known.

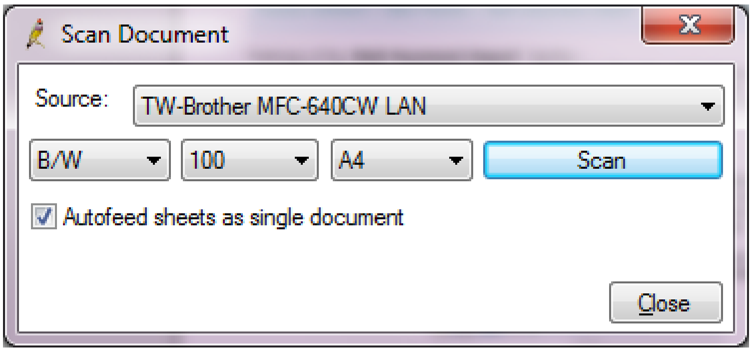
To open a file externally from BDI, click the down arrow at the end of the toolbar and click the **Open file externally** icon:



Import from scanner

Ensure that the scanner is installed and is working within the Windows environment. This procedures assumes that you have selected 'Simple Interface' for the **Interface** configuration setting.

1. Click the **Scan document** button to display the **Scan Document** screen.



2. Select your scanner as the **Source**.
3. Select the colour depth from the **B/W** drop-down list.
4. Select the resolution. The default is 100 dots per inch.
5. Select the paper size.
6. If you are scanning using a document feeder and want the pages to be merged to a single document, tick the **Autofeed sheets as single document** checkbox.
7. Click **Scan**. The document will be scanned, ready to be allocated to a patient or Bp Premier user. The **Import new files** screen will appear.
8. You can now view and edit the imported image.

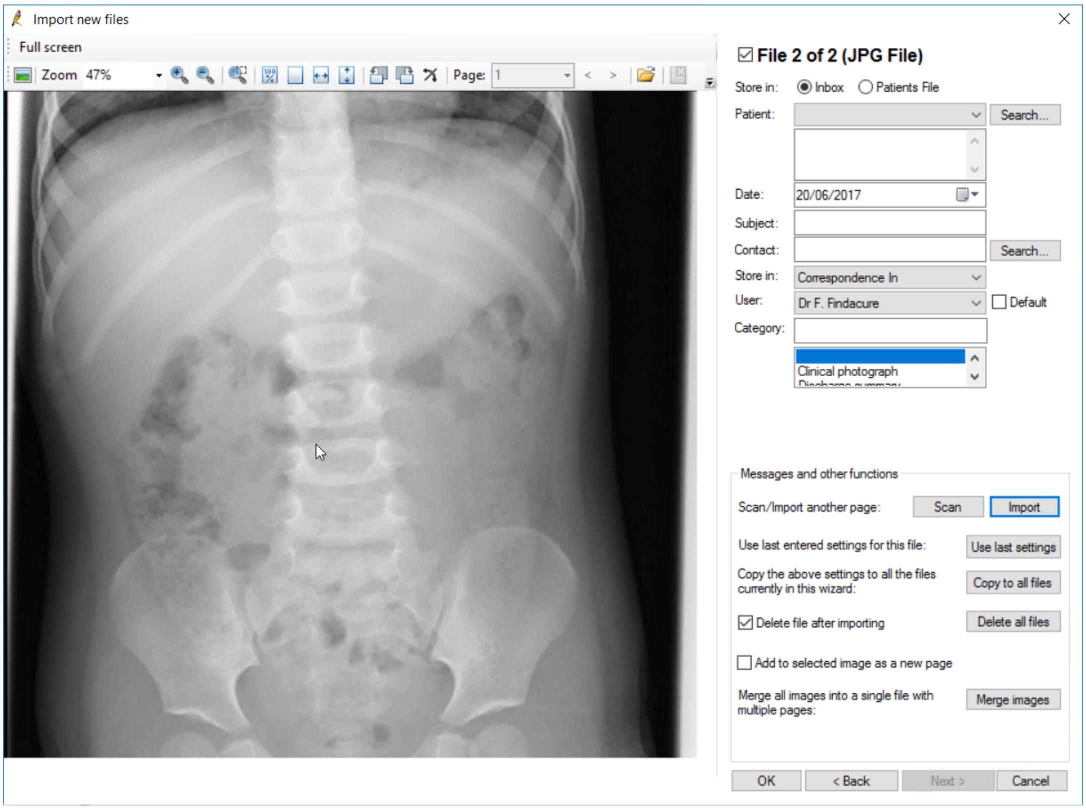
Import from camera

Ensure the camera is connected to the PC and can be accessed within the Windows environment (the camera device should be available in Windows file explorer).

1. Select **File** > **Import from Camera**, or click the camera icon in the toolbar to display the **Get picture from** screen. All images that are stored on the camera will be displayed.
2. To show an image in a larger view, click the **Detail** icon.
3. Select an image and click **Get picture** to import the image. The **Import new files** screen will appear.
4. You can now view and edit the imported image.

View and edit the image

The screen capture below shows the **Import new files** screen with an imported image.



The toolbar across the top manipulates the image in the following ways:

- zoom in and out, or zoom to a specific percentage
- marquee zoom in on a selected part of the image
- grip and move the image
- fit the image to actual size, screen width, screen height, or the visible part of the image
- rotate the image 90 degrees to the left or right.

If an imported document has multiple pages, the options at the right end of the toolbar allow you to:

- view as a single page or single column
- move back and forth between pages
- open a document outside of Bp Premier (you will be prompted for the external application to use)
- delete the current page
- change the page order.

The top right of the **Import new files** screen shows the selected file of the total number of files imported. Untick this checkbox to exclude the selected file from import.

After editing the image to your specification, you are ready to store the image in the Inbox or Patients file.

Store to the Inbox

1. From the **Import new files** screen, set **Store in** to 'Inbox'.
2. Click **Search** next to the **Patient** field to show the **Open Patient** screen.
3. Search for and select the patient associated with the image, if any, and click **Open**. The selected patient will appear in the **Patient** field.

   Note: *The **Patient** field can be left blank and allocated later. However, documents do not appear in the Inbox until they are allocated to a patient, if your practice has ticked **Configuration** > **Results import** > **Don't allow unallocated reports into Inbox**.*

4. The **Date** of the document defaults to today's date, but can be changed to reflect the date the document was written or received.
5. The **Subject** field supplies a brief description of the document contents. This field is optional.
6. Click **Search** next to the **Contact** field to show the **Select contact** screen.
7. Search for and select the contact who is the sender of the document. If the sender does not exist in the database, click **New contact** to open the **Contact Details** screen to create a new contact.
8. Select the section of the patient record to **store in**:
   - Investigations
   - Correspondence In
   - Clinical Images
9. Select the **User** to store the document in their Inbox. If you are importing multiple documents for the same provider, tick the **Default** checkbox.
10. If you need to import other images or documents into the current open document, click **Scan** or **Import** to scan or import from file. The file will be inserted at the end of the open document.
11. Click **Copy to all files** to copy your settings to all the files in the import list.
12. Tick **Delete file after importing** to delete the source file after the file has been successfully imported. Click **Delete all files** to apply this setting to all files in the current import list.
13. See **Merge and reorder pages on the facing page** for more information on the page and merge images options. These options will only appear if you have multiple images in the import list.
14. Click **Next** to set the options for the next file, or **OK** to begin storing to the user's Inbox. Bp Premier will report the number of successfully stored documents.
15. Make sure the counts for each import type are correct. You may need to reimport or scan the document again.

Note: *When storing to Inbox, you do not need to allocate all imported documents to a patient or a user before importing. If unallocated, documents will remain in the **Imported document list (for inbox)** waiting to be allocated. This list is useful if you are going to scan a large amount of information and don't want to allocate each document on the run. See* ***Manage the imported document list (for inbox) on page 33*** *for more information.*

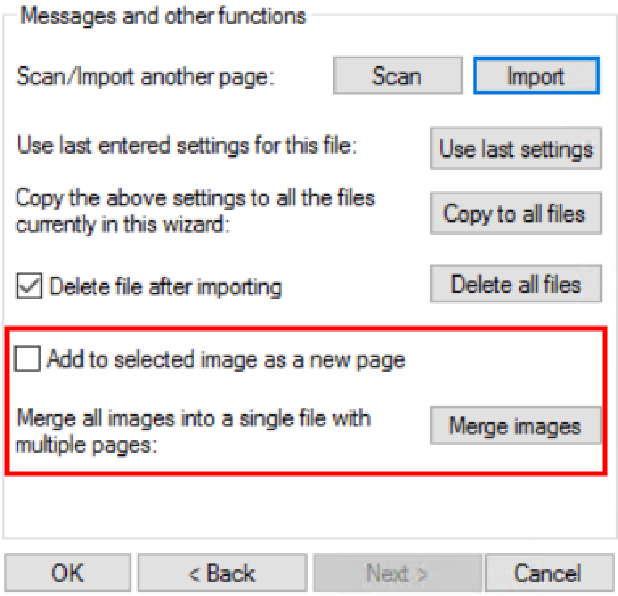
Store to a patient file

1. From the **Import new files** screen, set **Store in** to 'Patients file'.

2. Click **Search** next to the **Patient** field to show the **Open Patient** screen.
3. Search for and select the patient whose record you want to import the image into, and click **Open**. The selected patient will appear in the **Patient** field.
4. The **Date** of the document defaults to today's date, but can be changed to reflect the date the document was written or received.
5. The **Subject** field supplies a brief description of the document contents. This field is optional.
6. Click **Search** next to the **Contact** field to show the **Select contact** screen.
7. Search for and select the contact who is the sender of the document. If the sender does not exist in the database, click **New contact** to open the **Contact Details** screen to create a new contact.
8. Select the section of the patient record to **store in**:
   - Correspondence In
   - Correspondence Out
   - Clinical Images
9. If you selected to store in 'Correspondence In', select a **Category** that best describes this document.
10. Enter a detailed description for the document in the **Detail** field.
11. Enter a User Reference in the **User Ref** field, if your practice uses references. This field is optional, and does not apply to Correspondence out documents.
12. Tick **Confidential** if the document is confidential. The document will only be visible for the provider marked as **Usual provider** in the patient's record.
13. If you need to import other images or documents into the current open document, click **Scan** or **Import** to scan or import from file. The file will be inserted at the end of the open document.
14. Click **Copy to all files** to copy your settings to all the files in the import list.
15. Tick **Delete file after importing** to delete the source file after the file has been successfully imported. Click **Delete all files** to apply this setting to all files in the current import list.
16. See **Merge and reorder pages below** for more information on the new page and merge images options. These options will only appear if you have multiple images in the import list.
17. Click **Next** to set the options for the next file, or **OK** to begin storing to the patient's file. Bp Premier will prompt you with the number of successfully stored documents:
18. Make sure the counts for each import type are correct. You may need to reimport or scan the document again.

Merge and reorder pages

If you have a file open in the **Import new files** screen, you can insert a scanned or imported from file image into the current image as a new page instead of a new document. Use the following options to merge and delete images:

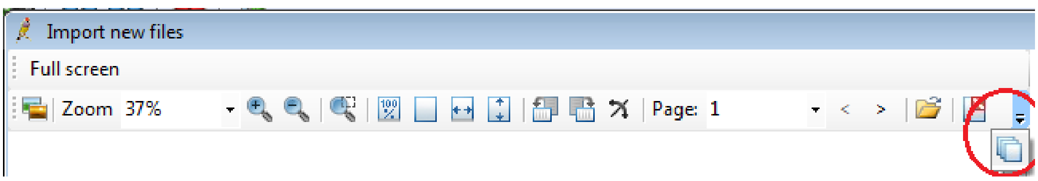


- **Add to selected image as a new page** — adds the currently displayed page to a document that is currently listed in the **'Imported document list' (for inbox).** You will need to highlight the relevant document in the **'Imported document list' (for inbox)** before you open the **Import new file screen**.
- **Merge** — Some files of the same type (for example, .tiff, .jpg, and some PDFs) can be merged together. This function merges open files into one single document.

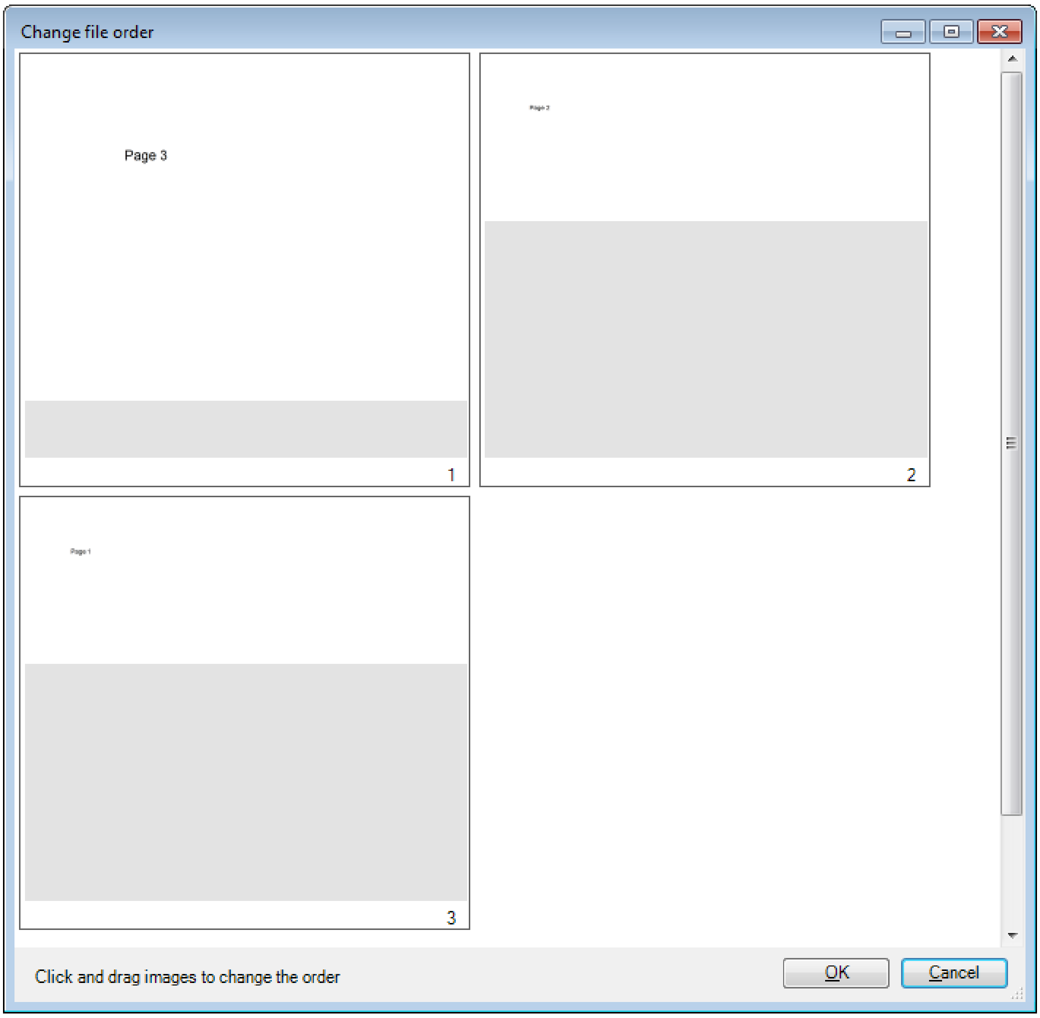
***Note:** The merge options will only appear for images, or a combination of merged and scanned PDFs. You cannot merge only imported PDFs or PDF and image files.*

To reorder pages in a merged file:

1. Click on the down arrow at the right of the image toolbar.



This will open the **Change file order** screen.



2. Click on the file to move and drag it into the position required.
3. When you have reordered the pages, click **OK**.

Manage the imported document list (for inbox)

The **Imported document list** in the BDI main screen displays all imported or scanned documents that have been marked as **Store to Inbox**, and:

- have not been allocated to a user or patient record
- have been allocated to a user, but the user has not yet actioned the document from their Inbox.

Note: *Documents do not appear in a user's Inbox until they are allocated to a patient. This prevents bulk scans from being stored in the Inbox without patient allocation.*

When you select a document in the list, the file details are displayed in the **File allocation** section above. You can edit the fields in this section; changes will be saved automatically.

To assign file allocation details to multiple files

1. Hold down the Ctrl key and click on each document you want to update details for. The image preview will change to **Multiple files selected**.
2. Make changes as required to the **File Allocation** fields. Changes will be applied to all selected documents.

To merge documents

1. Hold down the Ctrl key and click on each document you want to merge into one.
2. Select **File** > **Merge Selected items**. The **Merge file** screen will appear.
3. Reorder pages or change file allocation details and click **OK**. See **Merge and reorder pages on page 31** for more information.

Note: *When two files have been merged, the icon on the Imported document list will change from a single page to a nested page.*

To append to a document in the imported document list

You can attach a scanned or imported image to a document in the imported document list, if the selected document is an image file (for example, .jpg, .bmp).

1. Click on the document in the Imported document list that you want to append to.
2. Click either the **scan** or **import** button to import or scan the new document. The **Import new files screen** will appear.
3. Tick the checkbox **Add to selected image as a new page** and click **Ok**. The imported image will be appended to the one selected in the Imported documents list.

Import patient records

Bp Premier can import one or more patient records into the database.

For example, 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.

What file format can I import?

If the previous practice used Bp Premier 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 Premier or MD3).

What if an imported patient record already exists?

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.

Who can import patient records?

A user needs the **Import clinical data** permission set to 'Allow access' to be able to import patient records. You also need 'Add/Edit/Delete' privileges for the **Configuration** permission.

Importing patients with validated Health Identifier numbers

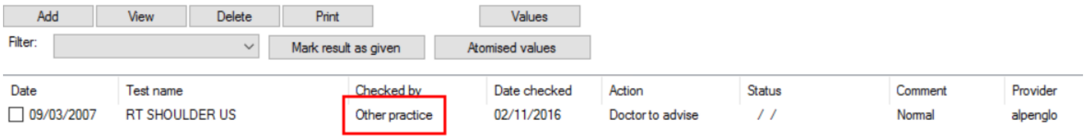
Depending on the age of an imported patient's last validation for their My Health Record identifier, an attempt to access My Health Record for a patient will trigger a revalidation attempt of the patient's Health Identifier.

Importing patients with custom preparations

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 patients with actioned investigations

If you import a patient record by XML from another practice, Bp Premier can tell if an investigation has been checked and actioned, but has no way of knowing *who* in the other practice has checked an investigation. In these instances, Bp Premier will mark the **Checked by** field on the investigation report as 'Other practice', so that users can see that an investigation has been checked elsewhere.



Import a small number of patient records

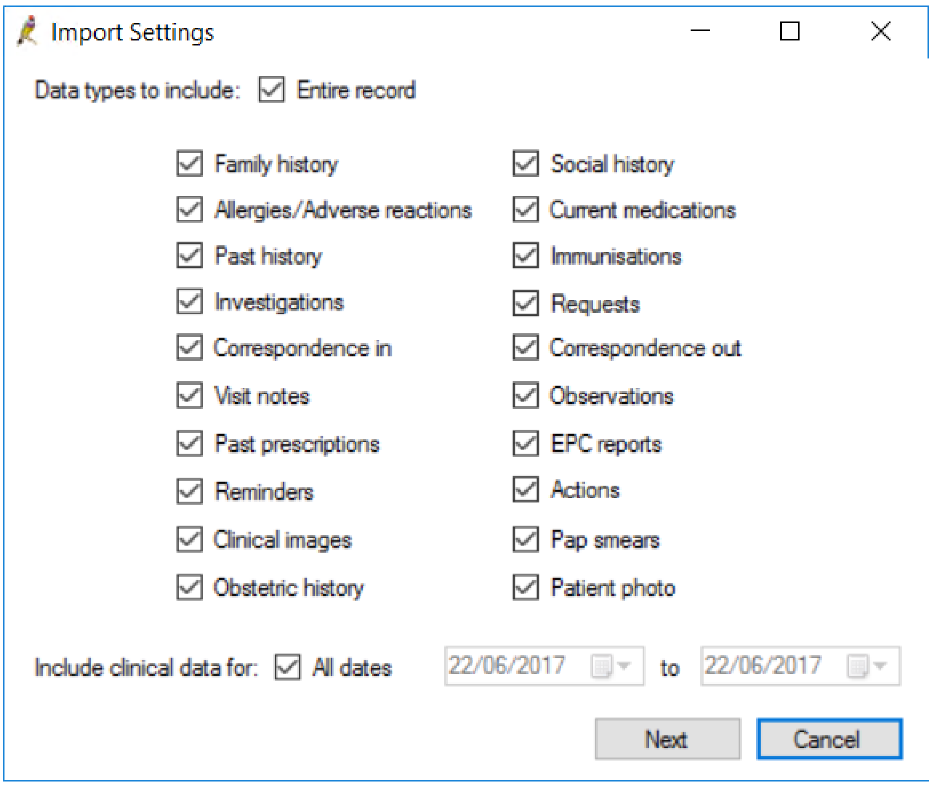
Use this method when you only have one or two patient record files to import.

1. On 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**.

   You can also navigate directly to the utility .exe file in a file explorer. Browse to the default install directory C:\Program Files\Best Practice Software\BPS\BPSupport\ and double-click the file **BPS_ImportExportUtility.exe**.

2. Log in using your username and password. The **Import/Export utility** screen will appear.
3. Click **Import Single Patient**. The **Import Settings** screen will appear.



4. Tick the data you want included in the import.

5. Tick **All dates** to import all data in the file, or select a start and stop date range to import only data between the dates.

   An item is included if the *clinically significant* date falls between the date range; the clinically significant date is the date of administering, not the date when the item is recorded by a Bp Premier user. Items without clinically significant dates, such as demographic information, are imported by default.

6. Click **Next**. Browse to the location of the patient XML and select the file you wish to import.

   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 Premier cannot import, or the file may have been edited or corrupted and contain errors.

7. 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. The record can now be viewed in Bp Premier.
8. Repeat steps 3–6 for each individual record you want to import.
9. Click **Close** to close the **Patient Import-Export** utility.

Import multiple patient records

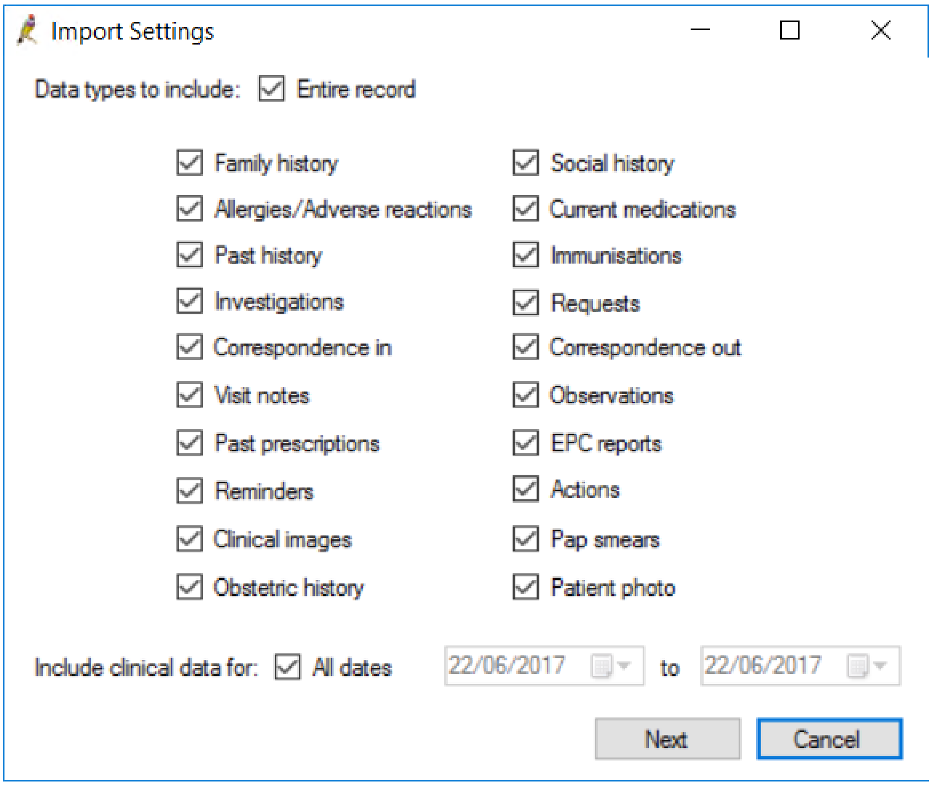
Use this method if you have an entire folder of patient records in XML format you wish to import into Bp Premier, for example, loaded onto a memory stick. There must be no other files in the folder.

1. On Windows 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**.

   You can also navigate directly to the utility .exe file in a file explorer. Browse to the default install directory C:\Program Files\Best Practice Software\BPS\BPSupport\ and double-click the file **BPS_ImportExportUtility.exe**.

2. Log in using your username and password.
3. Click **Import bulk patients**. The **Import Settings** screen will appear.



4. Tick the data you want included in the import.
5. Tick **All dates** to import all data in the file, or select a start and stop date range to import only data between the dates.

   An item is included if the *clinically relevant* date falls between the date range; the clinically significant date is the date of administering, not the date when the item is recorded by a Bp Premier user. Items without clinically significant dates, such as demographic information, are imported by default.

6. Click **Next**. Browse to the folder containing the patients record to import. Click **OK**.

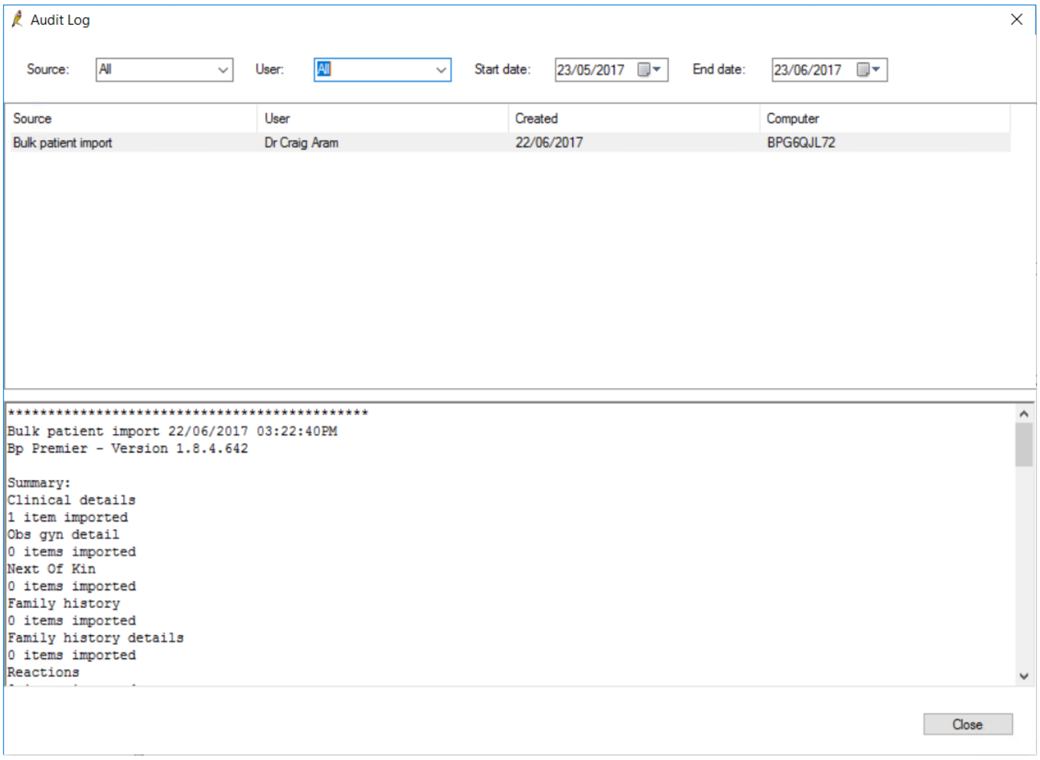
   Bp Premier will check that all XML files in the folder are in the correct format. If any issues are found, a message will be displayed and an entry written to the *BPS Bulk Export Error.log* file with more information. The XML file may be in a format that Bp cannot import, or the file may have been edited or corrupted and contain errors.

7. 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.
8. At the end of the import process, a message will indicate how many patient records have been successfully imported.
9. Click **Close** to close the **Patient Import-Export** utility.

View a patient record's import history

Bp Premier records details of imported patient records, including the data imported. This allows providers to which patient data was imported from another practice, and who imported the record.

1. Select **View** > **Audit Log** from the patient record to open the **Audit Log** screen.



2. Filter by **Source** (type of import), **User** (who imported), and date range.
3. Select a record in the top half to view the details in the bottom half of the screen.