

Indigo

Bp Premier Management Setup Guide

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Last updated: September 2018

Intended for usage with Bp Premier version Indigo.

This User Manual is sourced from the Best Practice Software Bp Premier Indigo [Knowledge Base](#).

Set up the Management module

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

Before you start configuring Management functionality, you should have arranged the following:

1. Obtain your **Site ID** and **Minor ID** from Best Practice Software. If your practice has multiple locations, each location will need a unique Minor ID.
2. Obtain your **Medicare Site certificate** and passcode from Medicare. If you have converted from a previous software package, you will need to let Medicare know your change in software and new Minor ID.
3. If you are using Tyro, purchase and install your Tyro terminal and obtain the **Merchant IDs** for each user who will be processing payments through Tyro.
4. Obtain a valid trial or production Bp Premier licence key and enter the licence key into the Bp Premier server. If you do not have a licence key, contact General Products Support on 1300 401 111

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.

Some procedures may ask you to view other topics in the knowledge base. To open a hyperlink in a new browser tab, right-click on the link and select **Open in a new tab**, or click with the middle mouse button.

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 Record.

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, 'dd/MM/yyyy' or 'dd/MM/yy'. Do not use a month-first format.

***Note:** To reduce the chance of confusion, SMS Reminders will always represent the <ApptDate> template field in the format 'dd/MM/yyyy', regardless of the Windows regional setting.*

6. Select the **Location** tab and set the **Location** to 'Australia'.
7. Click **Ok** to save and exit the **Region** dialog.

Region

Formats | **Location** | Administrative

Format:
English (Australia) ▼

[Language preferences](#)

Date and time formats

Short date: d/MM/yyyy ▼

Long date: dddd, d MMMM yyyy ▼

Short time: h:mm tt ▼

Long time: h:mm:ss tt ▼

First day of week: Monday ▼

Examples

Short date: 20/09/2016

Long date: Tuesday, 20 September 2016

Short time: 10:41 AM

Long time: 10:41:00 AM

Additional settings...

OK Cancel Apply

Enter practice details and locations

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, Bp Premier

will prompt to enter the practice details when you first log in.

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. A user selects a location when he or she logs in to the software.

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.

Practice details

Practice name: Best Practice Free Clinic

ABN Number:

VSP Number:

Health Identifier: 8003623233351777

☐ Evaluation only

Site ID Number: 987654

Licence Code: 21MK4MF4DR568MHK0012

Save 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.

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:

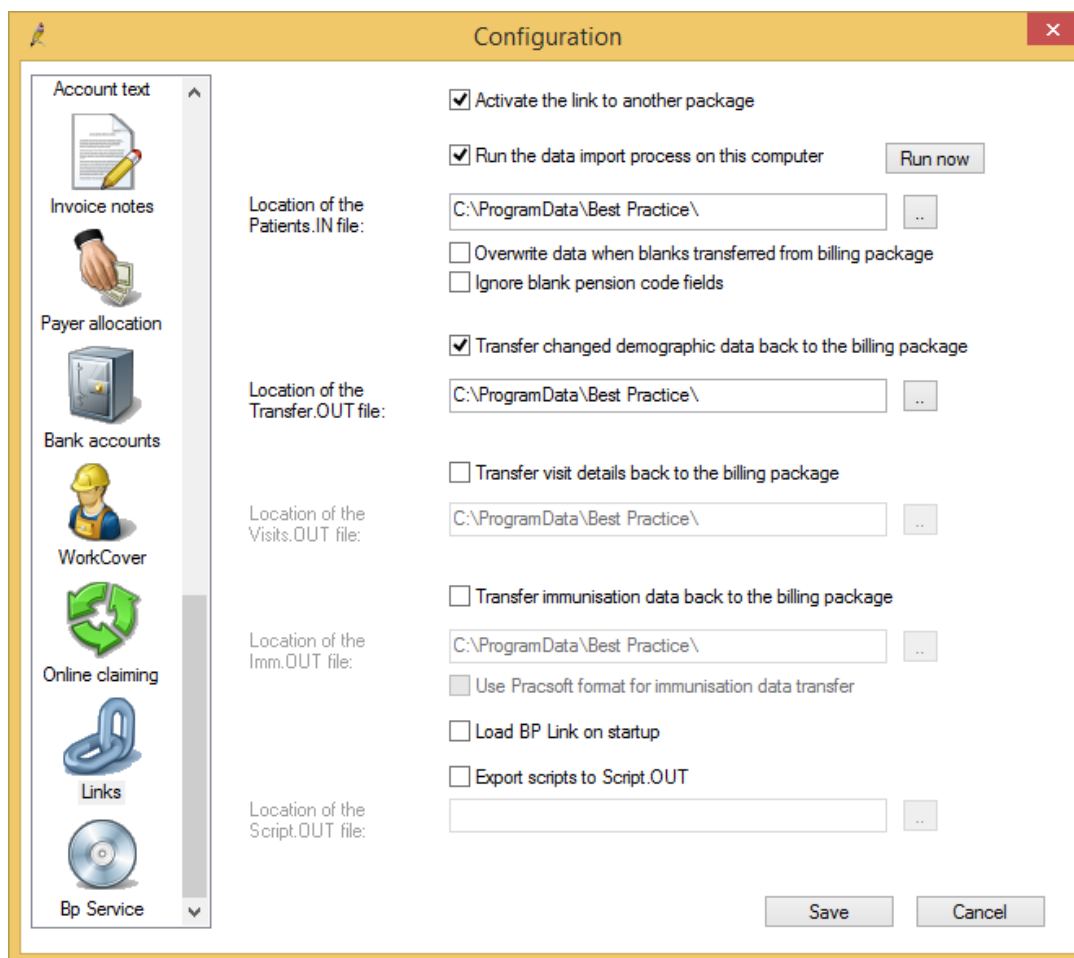
1. Select the location on the **Practice details** screen and click **Delete**. A prompt will appear if any users have provider numbers linked to that location.
2. If the location is deleted, users with linked provider numbers will still be visible, but the provider number linked to that location will 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



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. Billing preferences

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

Configuration

Default billing for: New providers: Practice fee New patients: Practice fee

Billing precedence: Doctor Payment Type: Cash

☒ Default to the patient's usual doctor for new accounts

☒ Enforce entry of reason for cancelling payments and invoices

☐ Create separate accounts in Debtor list for each doctor

☒ Print practice name on accounts, receipts and statements

☒ Prevent Direct Bill vouchers without Medicare or DVA No.

☒ Allow invoices with no services to be printed

☐ Print invoices and receipts on A5 paper

☒ Print header on invoices and receipts

☒ Bill direct to insurance company if known

☒ Prompt when there is a duplicate service on the same day

☐ Print Medicare No and DoB on invoices and receipts

☐ Print health insurance fund details on invoices and receipts

☒ Include outstanding balance on Invoices and Receipts

☒ Include 'Practice' in the list of billing providers

☒ Default to DVA List for DVA accounts for Allied Health Professionals

☒ Include Services when using 'Use previous account' button

☐ Round GST to the nearest 5 cents

☒ Apply Diagnostic Imaging rules to private accounts

☒ Check the 'Credit payments...' box when reversing payments

Print name & address on accounts and receipts 0 mm from left of page

Start printing body of accounts and receipts 20 mm from top of page

Layout of Medicare Claim form PC-1 (697.12.01.06)

Save Cancel

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

Field	Description
Default billing	Sets the default billing type when new providers are added.
New patients	Sets the default billing type when new patients are added.
Billing precedence	<p>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:</p> <ul style="list-style-type: none"> ■ If set to 'Doctor', all patients seen by that doctor will be billed according to the doctor's default billing. ■ If set to 'Patient', the patient will always be billed according to the patient's billing type.
Payment Type	Determines which payment type will be selected when you first open the Payments screen: None, Cash, EFT, or Credit card.

Field	Description
Default to the patients usual doctor for new accounts	If ticked, all new accounts generated from the Create Account screen will be billed to the provider listed in the patient's usual doctor field in the patient's demographics record.
Enforce entry of reason for cancelling payments and invoices	If ticked, users must enter a reason for cancelling payments and invoices.
Create separate accounts in Debtor list for each doctor	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.
Print practice name on accounts, receipts and statements	If ticked, the practice name and address entered in the Setup > Practice details > Edit 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.
Prevent Direct Bill vouchers without Medicare and DVA no.	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.
Allow invoices with no services to be printed	If ticked, accounts that do not contain any services can be printed. If unticked, blank accounts can not be printed.
Print invoices and receipts on A5 paper	If ticked, all invoices and receipts will print in A5 format. If unticked, all invoices and receipts will print in A4 format.
Print header on invoices and receipts	If ticked, all invoices and receipts will have the practice or doctor details printed at the top of the page (see also setting for Print practice name on accounts, receipts and statements). If unticked, nothing will be printed at the top of invoices and receipts. The letterhead will be used.
Bill direct to insurance company if known	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.
Prompt when there is a duplicate service on the same day	Tick this box to display, when saving an invoice, if an item number listed on the invoice has already been billed that day.

Field	Description
Print Medicare No and DoB on Invoices and receipts	Tick this box to print the patient's Medicare number and date of birth in their invoices and receipts.
Print health insurance fund details on invoices and receipts	Tick this box to print a patient's health care fund details from their demographic record in the patient's invoices and receipts.
Include outstanding balance on Invoices and Receipts	Tick this box to print outstanding balances on invoices and receipts.
Include Practice in the list of billing providers	Tick this box to include the provider's practice in the list of billing providers when creating an account.
Default to DVA list for DVA accounts for Allied Health Professionals	Tick this box to display the Allied Health DVA item list when creating accounts for DVA patients.
Include Services when using 'Use previous account button	If ticked, the Use previous accounts function is available when creating an account to default to, including services.
Round GST to the nearest 5 cents	Rounds GST amounts up or down to the nearest 5 cents.
Apply Diagnostic Imaging rules to private accounts	Apply the multiple services rules for diagnostic imaging, as applied to Medicare and DVA accounts, to private fee accounts also.
Check the 'Credit payment...' box when reversing a payment	<p>When reversing a payment, tick the Credit payment to payer's account checkbox on the Reverse Payment popup by default.</p> <p>If the Credit payment to payer's account checkbox is ticked, the refunded amount will be credited to the payer's account.</p>
Print name & address on accounts and receipts __ mm from left of page	Adjusts where the name and address is printed on accounts or receipts from the left of page.

Field	Description
Start printing body of accounts and receipts __ mm from to top of page	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.
Layout of Medicare Claim form	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. 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. 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: Main surgery

Standard account footer:

Accounts must be paid within 30 days. Prompt payment would be appreciated.

> 30 days overdue:

REMINDER: - this account is now overdue. Immediate payment would be appreciated. If payment has already been made, please disregard this reminder.

> 60 days overdue:

REMINDER: - this account is now overdue. Immediate payment would be appreciated. If payment has already been made, please disregard this reminder.

> 90 days overdue:

REMINDER: - this account is significantly overdue. Immediate payment must be made. If payment has already been made, please disregard this reminder.

Discount text:

This account has been discounted from the standard practice fee of %FEE%.

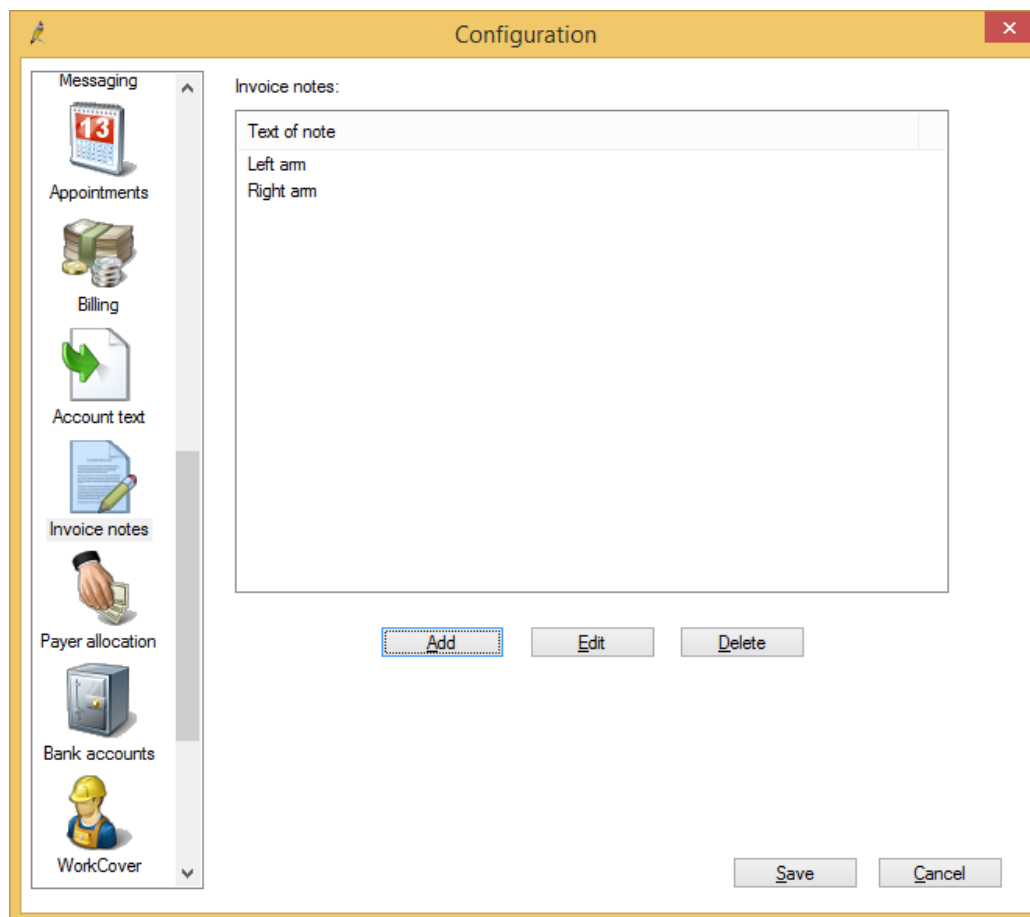
Base overdue for practice on: ☒ Invoice date ☐ Service date

Save Cancel

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. 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.



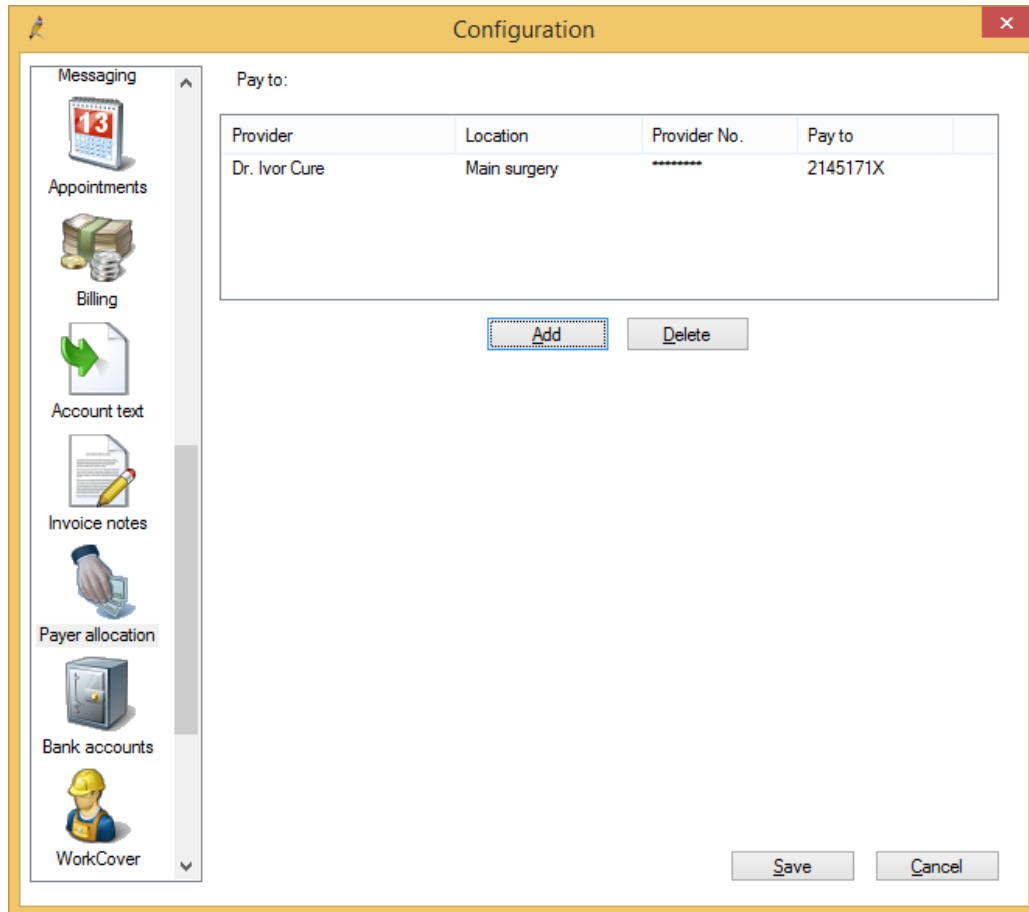
2. Select **Add** to add a new invoice note.
3. Click **Save** when you are finished creating invoice notes.

Invoice notes help ensure that Medicare accounts are created consistently.

6. 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.

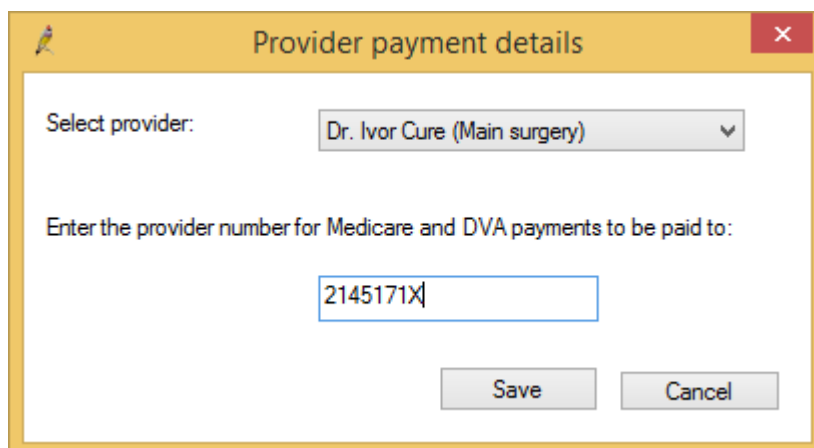


The Configuration window has a sidebar on the left with icons for Messaging, Appointments, Billing, Account text, Invoice notes, Payer allocation (selected), Bank accounts, and WorkCover. The main area is titled 'Pay to:' and contains a table with the following data:

Provider	Location	Provider No.	Pay to
Dr. Ivor Cure	Main surgery	*****	2145171X

Below the table are 'Add' and 'Delete' buttons. At the bottom right of the window are 'Save' and 'Cancel' buttons.

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



The Provider payment details window has a 'Select provider:' dropdown menu with 'Dr. Ivor Cure (Main surgery)' selected. Below this is a text input field with the value '2145171X'. At the bottom are 'Save' and 'Cancel' buttons.

- 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. 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:

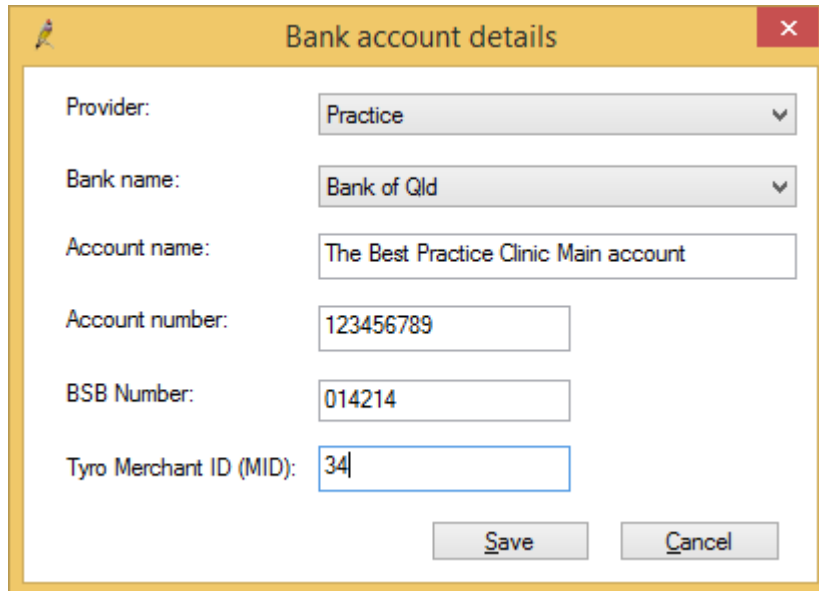
Provider	Account na...	Bank name	Account No.	BSB No.	MID
Dr Frederick ...	Dr Fred Find...	Bank of Qld	332244123	123123	

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. 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

Default bank names:

Bank name
Bank of QLD
Medical Bank of Australia

Add
Delete

Default drawers:

Provider
MBF
WorkCover

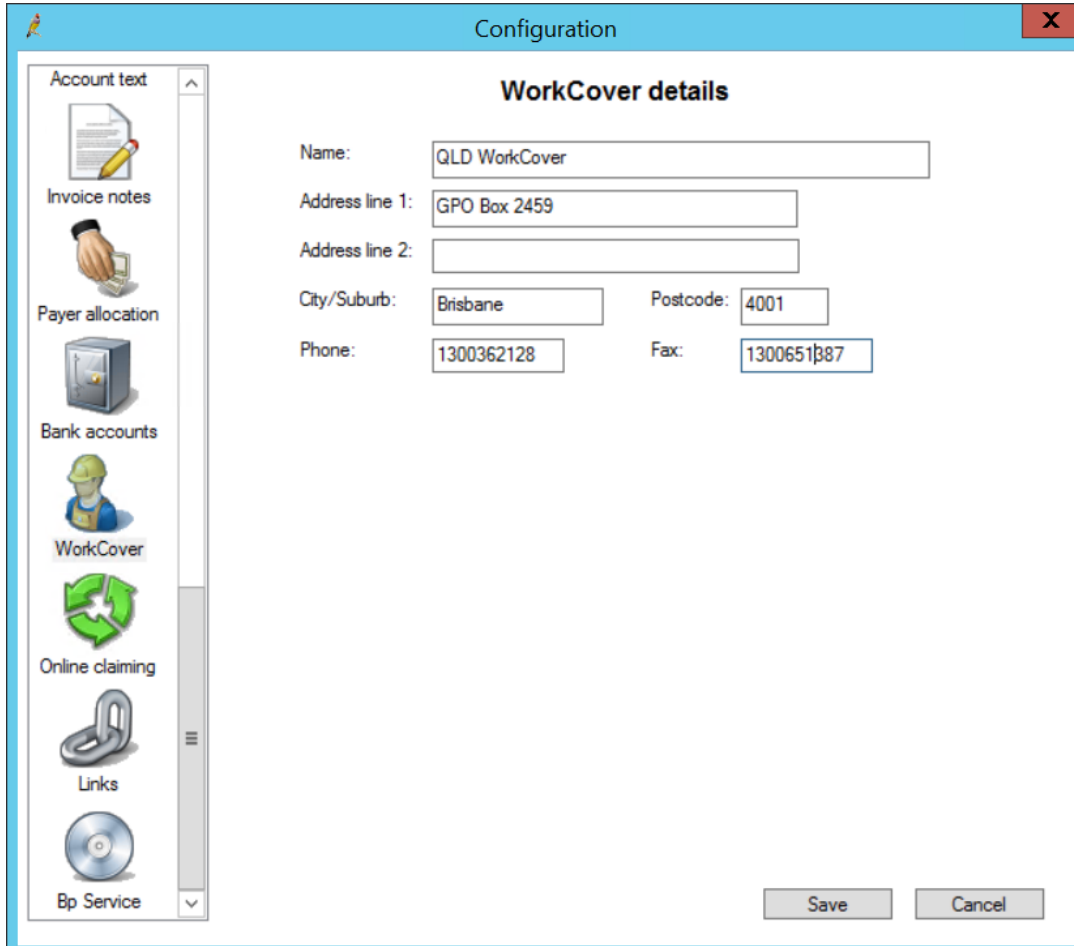
Add
Delete

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. 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 the 'Configuration' window in Bp Premier. On the left is a vertical sidebar with icons and labels for various settings: Account text, Invoice notes, Payer allocation, Bank accounts, WorkCover (selected), Online claiming, Links, and Bp Service. The main area is titled 'WorkCover details' and contains several text input fields. The fields are populated with the following information: Name: QLD WorkCover, Address line 1: GPO Box 2459, Address line 2: (empty), City/Suburb: Brisbane, Postcode: 4001, Phone: 1300362128, and Fax: 1300651387. At the bottom right of the main area are 'Save' and 'Cancel' buttons.

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

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.

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.*

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**.

4. 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.

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.

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.

Setup practice fees

Customised fees: Filter text: Search item no:

Description	MBS Item	Add GST
Custom item	No	
Workcover	Yes	

Fee list:

Fee schedule	Amount
Custom schedule	25.00
Practice fee	10.00
WorkCover	0.00

Custom fee schedules:

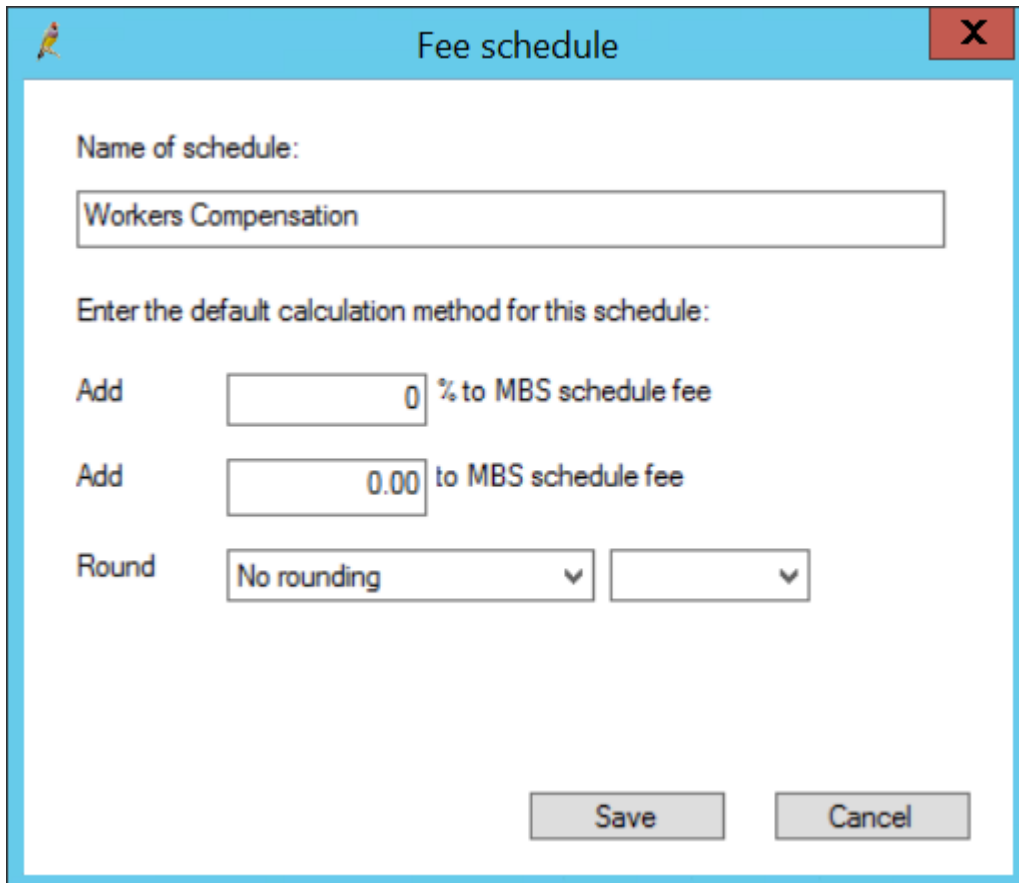
Fee schedule name	Calculation method
Custom schedule	Schedule fee + 0.25% + 5.00, rounded to the nearest 5 cents
Practice fee	Schedule fee, no rounding
WorkCover	Schedule fee + 5.0%, no rounding

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

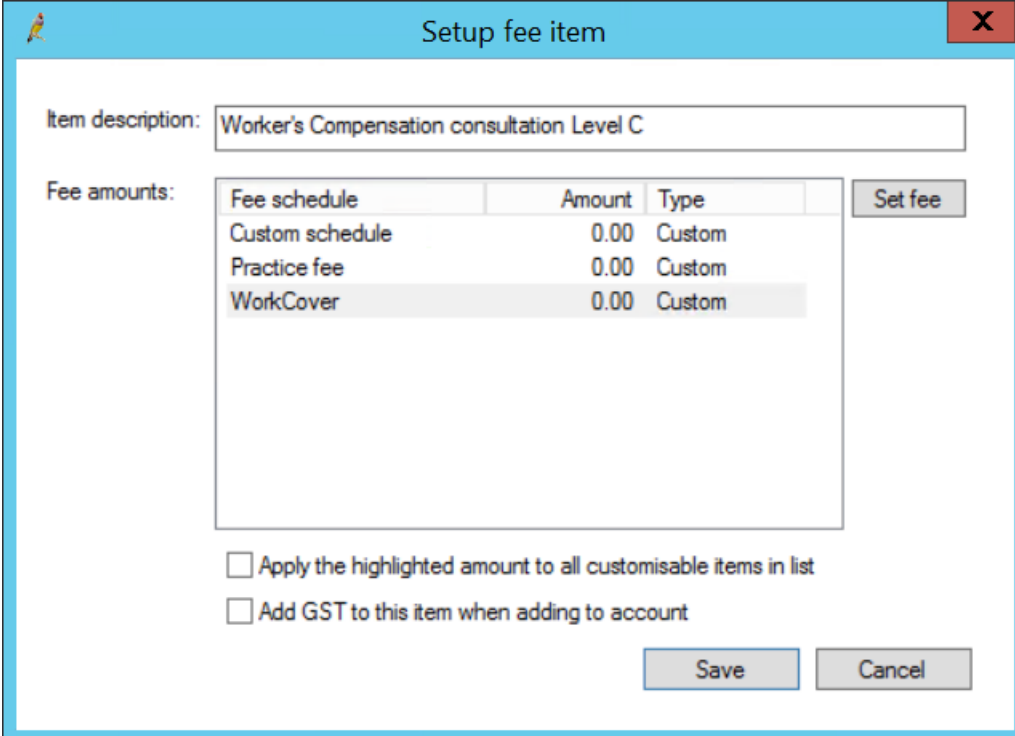
2. Enter the name of the schedule and indicate the default calculate method. No calculation method means users will enter the fees directly against the schedule.
3. Indicate the rounding method, if applicable.
4. Click **Save** to return to the **Setup practice fees** screen.

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 [X]

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**.

Add 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.

Add 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

Customised fees: Filter text: Search item no:

Description	MBS Item	Add GST
Custom item	No	
Workcover	Yes	

Fee list:

Fee schedule	Amount
Custom schedule	25.00
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

My Health Record

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.

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 icons. 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**.

Appointments

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

Configuration

Start time: 8 a.m. End time: 6 p.m.

Appointment length: 15 minutes

Refresh interval: 15 seconds (minimum 15 seconds)

Minimum column width (pixels): 200 ☐ Use fixed minimum width

Default Daysheet layout: ☒ Portrait ☐ Landscape

☐ Display Sunday in appointment window ☒ Highlight row when Time column clicked

☒ Pop up notes when making appointment ☒ Pop up notes when patient arrives

☐ Check the Health Insurance Fund expiry ☐ Display record number on appointment

☒ Pop up notes when creating account

☒ Colour booked appointments differently from unbooked

☐ Allow users to open patient records from other user's appointments

☒ Allow users to change the 'Booked by' name when making appointments

☒ Show Cancellation list when an appointment is cancelled

☐ Include Inactive patients when making an appointment

☒ Require a reason when cancelling an appointment

☒ Display appointment type icons in Appointment book and Waiting room

☐ Don't display appointment icon on standard appointments

☐ Automatically show attendance status on appointment book

Appointment Book layout

Waiting room

☐ Show uncompleted appointments in Waiting room when opened


☒ Allow patients to be added directly to Waiting room

☒ Allow patients to be added to Waiting room for 'Any doctor'

Save Cancel

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

Field	Description
Start time	Sets the time of the first displayed appointment slot.

Field	Description
End time	<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> Tip: 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>
Appointment length	<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 Appointment length 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"> ■ 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. ■ 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. ■ 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. <p>Note: Individual doctor's appointment lengths are set when setting up their sessions.</p>
Refresh Interval	Sets the number of seconds between each refresh of the Appointment book.
Minimum column width (pixels)	Sets the minimum column width (in pixels) for each column on the Appointment book.
Default Day sheet layout	Portrait or Landscape.

Field	Description
Display Sunday in appointment window	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.
Highlight row when Time column clicked	This checkbox highlights an entire row on the Appointment book when the Time column is clicked.
Pop up notes when making an appointment	<p>Bp Premier records notes against a patient's name in the Appointment notes field on the Patient demographics 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 Pop up notes when making an appointment checkbox is ticked, any staff and system notes are displayed on the Add appointment screen when making an appointment.</p>
Pop up notes when patient arrives	If ticked, patient notes are displayed in a popup when a patient is marked as 'Arrived' in the Appointment book.
Check the Health Insurance Fund expiry date	If ticked, the Health Insurance Fund expiry date is checked when accounts are created and a prompt displayed if expired.
Display record number on appointment	Show the patient's record number from demographics, if any, in booked appointment book slots.
Pop up notes when creating account	If ticked, patient notes are also displayed in a popup when creating an account for the patient.
Colour booked appointments differently from unbooked	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.
Allow users to open patient records from other user's appointments	<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>
Allow users to change the 'Booked by' name when making appointments	If ticked, users can change the name of the person who has booked the appointment when creating the appointment.

Field	Description
Show Cancellation list when an appointment is cancelled	If ticked, when an appointment is cancelled, the cancellation list will show any patients who are waiting on an appointment to become available.
Include Inactive patients when making an appointment	If ticked, both inactive and active patients are displayed in the patient search screen.
Require a reason when cancelling an appointment	If ticked, the user will be forced to enter a reason for cancelling an appointment.
Display appointment type icons in Appointment book and Waiting room	If ticked, appointment book icons will appear next to appointments in the appointment book and waiting room.
Don't display appointment icon on standard appointments	If ticked, and the option Display appointment type icons... is ticked, standard appointments will not have icons displayed next to them.
Automatically show attendance status on appointment book	<p>If ticked, an attendance icon indicates whether an appointment's attendance has been confirmed or declined:</p> <ul style="list-style-type: none"> ■ A green circle icon means that the appointment has been confirmed. ■ A red circle icon means that the appointment has been declined. ■ A yellow circle icon means that the appointment has been sent an SMS reminder, but has not confirmed or declined the appointment. ■ No icon indicates that the appointment has not been sent an SMS reminder, and the appointment has not been confirmed or declined.
Show uncompleted appointments in Waiting room when opened	<p>If ticked, patients that are currently "With doctor" or "At billing" remain displayed in the Waiting room screen.</p> <p>If not ticked, the same patients are removed from the Waiting room screen as soon as the doctor opens the patient record and starts a visit.</p>
Allow patients to be added directly to Waiting room	If ticked, patients can be added to the Waiting room screen without having had an appointment made in the Appointment book.
Allow patients to be added to Waiting room for 'Any doctor	If ticked, patients can be added to the Waiting room 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.

SMS Reminders

SMS Reminders are configured from **Setup > Configuration > SMS Messages**. Patient consent to receive SMS messages is recorded in the patient demographics.

Appointment book layouts

SMS Reminders are configured from **Setup > Configuration > Appointments**.

Configure online claiming

Medicare online claiming is configured from the **Online claiming** tab of the **Configuration** screen. Search for 'set up online claiming' in the Indigo [Knowledge Base](#).

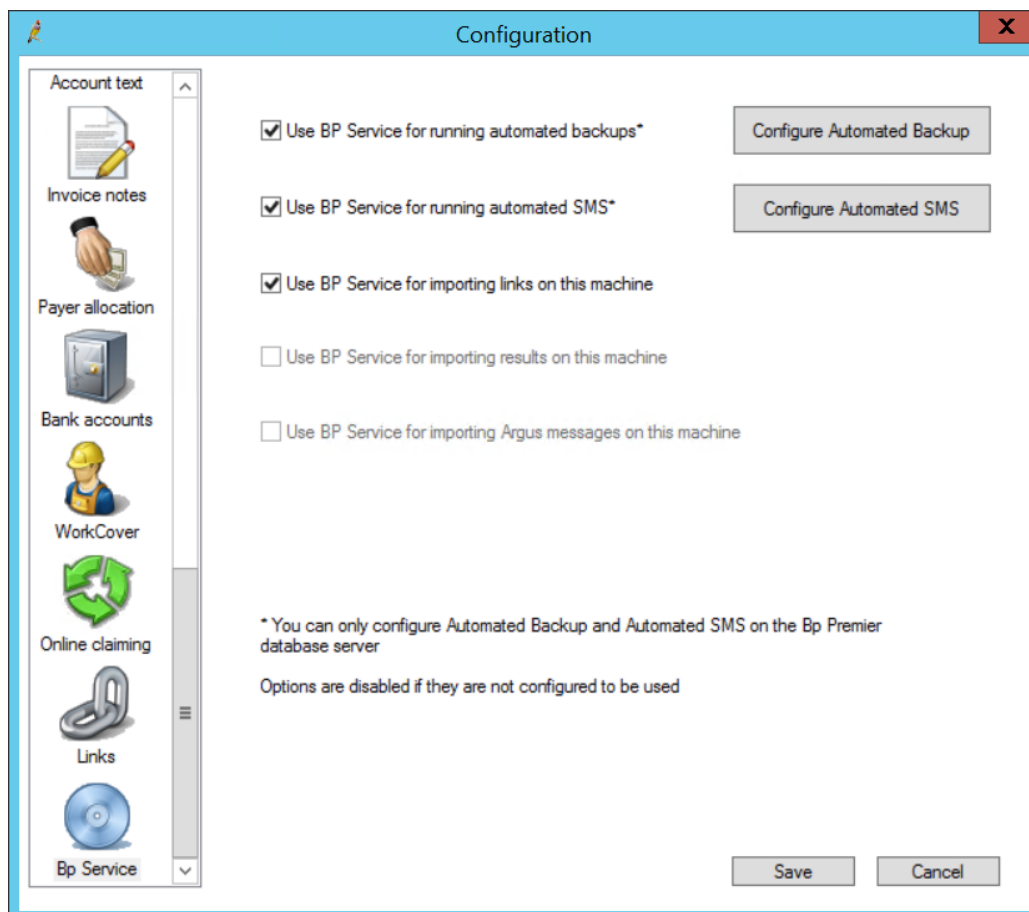
Set up Bp Service

Bp Service is a Windows operating system service that runs on the server to perform various functions such as scheduled backups, importing of results, and scheduled SMS communication. Bp Service is configured from within Bp Premier.

Bp Service replaces Bp Link, which was used by versions of Bp Premier prior to Lava. If you are running Lava or later, Best Practice Software strongly recommend discontinuing use of Bp Link and using BP Service to manage integrated functions.

Set up Bp Service

1. Select **Setup > Configuration** from the main Bp Premier screen. Select the **Bp Service** tab.



Bp Service runs the following functions:

- Scheduled and automated backups
- Scheduled and Automated SMS messages
- Importing linked files

- Importing results
- Importing Argus messages.

Tick the functions you want to run through Bp Service:

- To run scheduled backups through BpService, tick **Use BP Service for running automated backups**. Click **Configure Automated Backup** to display the details of any scheduled backups.
- To run scheduled SMS reminders through BpService, tick **Use BP Service for running automated SMS**. Click **Configure Automated SMS** to display the details of active SMS schedules. You must configure SMS reminders in Bp Premier first.
- To run third-party link file imports, such as billing data and patient demographic data exchange with billing software, through the BpService, tick **Use BP Service for importing links on this machine**. You must configure linking through the **Links** tab first.
- To run Result files imports through the Bp Service, tick **Use Bp Service for importing results on this machine**. You must configure Results importing from the **Results import** tab first.
- To import Argus messages through the BpService, tick **Use Bp Service for importing results on this machine**. You must have installed Argus first.

Click **Save** to save your Bp Service settings. Restart the service from Windows.

Start or restart the Bp Service

For any Bp Service changes to take effect, you will need to stop and start the Windows Bp Service.

1. From the Windows desktop, select **Start > Control Panel > Administrative Tools > Services**. The exact path will depend on your version of Windows.
2. Find the service 'Bp Service' in the list. Right-click Bp Service and select **Start** or **Restart**.

Stop Bp link

Prior to the Lava version, Bp Link was the process responsible for running automated functions. If you are running version Lava or later, Best Practice Software recommend that you use Bp Service over Bp Link for these functions.

If you have configured all Bp Link processes to run through BpService, you no longer need Bp Link running as a background process and can shut the process down.

***Note:** After you have configured a function to run via BpService, that function will no longer be run via BpLink. Best Practice Software recommend that if you move to using BpService for any function, you use BpService for **all** functions. Select all checkboxes on the **Bp Service** tab of the **Configuration** screen.*

Stop Bp Link from auto-starting on server reboot

1. Click on the **Links** icon on the **Setup > Configuration** screen.
2. Untick **Load BpLink on Startup**.
3. Click **Save**.

Close Bp Link on the machine you are currently using

1. Bp Link could be running as a background process. This is indicated by the Best Practice Software bird icon in the Windows system tray along the bottom of the screen.
2. Right-click the bird icon and select **Exit**. Enter the Bp Premier username and password of a user with permission to edit Configuration settings.

If Bp Link has been configured by a Windows administrator to run as part of a service, disable the service.

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 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.

