



**Stay on course  
with Saffron!**

JADE SP4 TO SAFFRON

# UPGRADE GUIDE

 Bp Premier



Saffron



# Contents

Before you start .....	4
About this Guide .....	4
Legend .....	4
What you've missed .....	5
Features .....	6
Saffron .....	6

# Abbreviations

Abbreviation	Meaning
ABN	Australian Business Number
ACT	Australian Capital Territory
ADHA	Australian Digital Health Agency
AIP	Active ingredient prescribing
API	Application Programming Interface
App	Application
ASL	Active Script List
BHA	Best Health App
BMI	Body Mass Index
Bp	Best Practice
CST	Cervical Screening Test
DVA	Department of Veteran Affairs
eScript	Electronic Prescription
FHIR R4	Fast Healthcare Interoperability Resources (Release 4)
GBR	Guidance-based requests
HL7	Health Level Seven
HPV	Human papillomavirus
ID	Identification
IT	Information Technology
KB	Knowledge Base
LBC	Liquid Based Cytology

Abbreviation	Meaning
MBS	Medicare Benefits Schedule
MC	Masterclass
NASH	National Authentication Service for Health
NCSR	National Cancer Screening Register
NDE	National Data Exchange
NIP	National Immunisation Program
ORU	Observation Result
PBS	Pharmaceutical Benefits Scheme
PDF	Portable Document Format
QLD	Queensland
QRG	Quick Reference Guide
R <sub>x</sub>	Medical prescription
S8	Schedule 8 drugs - Drugs of addiction
SMS	Short Message Service
SP	Service Pack (i.e., SP1 – Service Pack 1)
XML	Extensible Markup Language (file)

# Before you start









## About this Guide

So, you're looking to upgrade your version of Bp Premier from JADE SP4 to the latest SAFFRON release? This Guide has been developed to help make the transition as smooth and as seamless as possible. We've put this together as a useful summary of the key information you need to know about what has changed between your current version of the software and SAFFRON.

## Legend



For ease of use, release information has been categorised under the following groupings to help you to identify the nature of the content. We've also included links to various resources throughout the Guide that will provide you with more information about the feature, function or workflow described.

Using the legend below, you can tell at a glance the nature of the release information and what type of resources are available on a particular topic.

Icon	Description
<b>Release Information</b>	
	<ul style="list-style-type: none"> <li>• <b>Workflows changes</b> Major workflow changes that, in many cases, must be incorporated or at least considered once using new version.</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Watch-outs for staff</b> Not necessarily a change of workflow but things that might throw staff off, such as warnings or new prompts that should be addressed in staff education.</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Quick wins</b> New features or updates that require little change management to incorporate - some nice added bonuses</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Long term benefits</b> New features or updates that offer significant strategic and/or procedural benefit but would likely require planned changed process</li> </ul>
<b>Resource Type</b>	
	This icon represents a <b>Quick Reference Guide</b> (QRG) which is developed as a summary of key points and instructions (where applicable) relating to a new feature, function or workflow.
	This icon represents <b>Masterclass</b> (MC) videos which are hosted on our Bp Learning Vimeo channel. Delivered by our training specialists, Masterclasses accompany each new release and introduce the main features of that release, and may include an overview of what's new, enhancements, bug fixes and system requirements.
	This icon represents the <b>Knowledge Base</b> (KB). The Knowledge Base is our most comprehensive repository of informational and instructional material relating to a particular release of Bp Premier.
	This icon represents a link to a <b>website</b> where you can find more information to the related feature.

## What you've missed

At Best Practice we are continuously working to improve our products and bring you the latest features and functionality that technology has to offer. While we go into the details of each release in the next section, here's a summary of the releases you missed since your purchase/install of the **Jade SP4** release of Bp Premier:

Release Version	Release Date	Release Resources
SAFFRON	January 2021	<ul style="list-style-type: none"> <li> • <a href="#">Release Notes</a> (PDF)</li> <li> • <a href="#">Saffron Series - Secure Messaging</a> [11:25]</li> <li>• <a href="#">Saffron Series - Management Reports</a> [02:13]</li> <li>• <a href="#">Saffron Series - Bp Comms for Clinical Only</a> [04:22]</li> <li>• <a href="#">Saffron Series - Next Phase ePrescribing</a> [16:49]</li> <li>• <a href="#">Saffron Series - NCSR</a> [11:21]</li> <li>• <a href="#">Saffron Series - Medicare Refunds</a> [11:25]</li> <li>• <a href="#">Saffron Series - Active Ingredient Prescribing</a> [04:42]</li> </ul>











**Important:**

The good news is that by upgrading to **SAFFRON**, you will have access to ALL the new features, functions and workflows included in the each of these release versions.






# Features





## Saffron

The Saffron release comprises a raft of new initiatives and features, including the next phase of Electronic Prescribing, Secure Messaging, National Cancer Screening Register integration, Medicare refunds and more.





Cat.	Feature	Who it affects / Resources...
	<ul style="list-style-type: none"> <li><b>Medicare Refunds &gt; Online claiming</b> – A new <b>Refund/Adjust Payment</b> screen is available to handle whole refunds of Medicare payments.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input checked="" type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input type="checkbox"/> IT  <ul style="list-style-type: none"> <li><a href="#">Medicare Refunds</a> (KB article)</li> </ul>
		 <ul style="list-style-type: none"> <li><a href="#">Medicare Refunds</a> (Saffron Series MC)</li> </ul>
	<ul style="list-style-type: none"> <li><b>Medicare Refunds &gt; Online claiming</b> – A new <b>Refund</b> column has been added to top half of Online Claiming screens, while the bottom half includes new <b>Refund, Invoice No</b>, and <b>Comment</b> columns.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input checked="" type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Medicare Refunds &gt; User permissions</b> – A new user permission now controls access to the Medicare refunds function.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Prescribing &gt; Remote download</b> – Only the password security settings <b>password lockout period</b>, <b>number of login attempts</b>, and <b>password complexity</b> remain in effect when in remote download mode.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input checked="" type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Other &gt; Bp Comms and Licencing</b> – Sending messages to SMS and Best Health App (BHA) are now available for sites with a Clinical-only licence. Clinical-only sites will be able to use all electronic prescribing sending methods after upgrading to Saffron.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input checked="" type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT
		 <ul style="list-style-type: none"> <li><a href="#">Bp Comms for clinical in Saffron</a> (KB article)</li> </ul>
 <ul style="list-style-type: none"> <li><a href="#">Bp Comms for Clinical Only</a> (Saffron Series MC)</li> </ul>		
	<ul style="list-style-type: none"> <li><b>Security</b> – New Security tab in <i>Setup &gt; Configuration controls password security options</i>.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT
		 <ul style="list-style-type: none"> <li><a href="#">Manage Password and access security</a> (KB article)</li> </ul>

Legend:

 Workflow	 Watch-outs	 Quick wins	 Benefits	 IT requirements
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Cat.	Feature	Who it affects / Resources...	
	<ul style="list-style-type: none"> <li><b>Security</b> – Security tab contains a link to the KB article for guidance on password security settings.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers	<input checked="" type="checkbox"/> Admin/Reception
		<input checked="" type="checkbox"/> Clinicians	<input checked="" type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Security</b> – New password security settings:</li> </ul>	<input checked="" type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception
	<ul style="list-style-type: none"> <li>– minimum password length</li> </ul>	<input checked="" type="checkbox"/> Clinicians	<input checked="" type="checkbox"/> IT
	<ul style="list-style-type: none"> <li>– enforced lockout timeout from failed login attempts</li> </ul>	<div style="display: flex; align-items: center;">  <ul style="list-style-type: none"> <li>• <a href="#">Password security QRG</a> (QRG PDF)</li> </ul> </div>	
	<ul style="list-style-type: none"> <li>– enforced inactivity timeout and account lock when using eScript functionality</li> </ul>		
	<ul style="list-style-type: none"> <li>– enforced creation of a new password after a set time</li> </ul>		
<ul style="list-style-type: none"> <li>– enforced password reuse time limit</li> </ul>			
<ul style="list-style-type: none"> <li>– passwords checked for compliance with password security settings</li> </ul>			
<ul style="list-style-type: none"> <li>– maximum password length increased to 20 characters</li> </ul>			
<ul style="list-style-type: none"> <li>– enforced password complexity, while case sensitivity enforced when logging in if 'Strong' enabled.</li> </ul>			
<ul style="list-style-type: none"> <li><b>Secure Messaging</b> – Alert if intended recipient for a FHIR R4 directory cannot accept that HL7 version and suggests sending as an alternate version.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers	<input checked="" type="checkbox"/> Admin/Reception	
	<input checked="" type="checkbox"/> Clinicians	<input checked="" type="checkbox"/> IT	
	<div style="display: flex; align-items: center;">  <ul style="list-style-type: none"> <li>• <a href="#">Secure messaging</a> (Saffron Series MC)</li> </ul> </div>		
<ul style="list-style-type: none"> <li><b>Prescribing &gt; eScripts</b> – Maximum quantity authorised to dispense included when prescribing controlled drugs via eScript.</li> </ul>			
	<input type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception	
	<input checked="" type="checkbox"/> Clinicians	<input type="checkbox"/> IT	
	<div style="display: flex; align-items: center;">  <ul style="list-style-type: none"> <li>• <a href="#">Next Phase electronic prescribing</a> (Saffron Series MC)</li> </ul> </div>		
<ul style="list-style-type: none"> <li><b>Prescribing &gt; eScripts</b> – Authorisation reference number included when prescribing controlled drugs via eScript. Label corresponds to the state of issue (e.g., “Approval number” in QLD and ACT).</li> </ul>			
	<input type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception	
	<input checked="" type="checkbox"/> Clinicians	<input type="checkbox"/> IT	
	<input type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception	
<ul style="list-style-type: none"> <li><b>Prescribing &gt; eScripts</b> – Revalidation prompt checks for password security compliance when prescribing controlled drugs via eScript.</li> </ul>	<input checked="" type="checkbox"/> Clinicians	<input type="checkbox"/> IT	

Legend:

 Workflow	 Watch-outs	 Quick wins	 Benefits
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Cat.	Feature	Who it affects / Resources...
	<ul style="list-style-type: none"> <li><b>AIP</b> – Notification of generic substitution a particular brand is no longer valid when re-prescribing and the Active Ingredient is prescribed on the script.</li> </ul>	<input type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input checked="" type="checkbox"/> Clinicians <input type="checkbox"/> IT  <ul style="list-style-type: none"> <li>• <a href="#">Active Ingredient Prescribing</a> (KB article)</li> </ul> <ul style="list-style-type: none"> <li>• <a href="#">Active ingredient prescribing</a> (Saffron Series MC)</li> </ul>
	<ul style="list-style-type: none"> <li><b>AIP</b> – No NDE precheck is performed when prescribing a custom preparation, regardless of whether a monitored drug has been added as an ingredient.</li> </ul>	<input type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input checked="" type="checkbox"/> Clinicians <input type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Secure Messaging &gt; Certificate Validation</b> – Impending NASH certificate expiry alerted to Principal Doctor and Practice Manager on login.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT  <ul style="list-style-type: none"> <li>• <a href="#">Applying for a NASH PKI certificate</a></li> </ul>
	<ul style="list-style-type: none"> <li><b>Secure Messaging &gt; Messaging Configuration</b> – New dropdown list added to Online Directory Messaging Provider to record the messaging provider used for when a FHIR R4 compliant online directory is chosen.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Secure Messaging &gt; Messaging Configuration</b> – New button and popup screen (Configure Sending Facility) added to configure your practice as an endpoint in the secure messaging chain.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Secure Messaging &gt; Online directories</b> – Search by suburb and postcode enabled in online directories.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input checked="" type="checkbox"/> Admin/Reception <input checked="" type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Secure Messaging &gt; Online directories</b> – Specialty Code mappings updated to support Institutions.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Secure Messaging &gt; Online directories</b> – Local contacts access the most up-to-date details from the online directory when addressing a synchronised contact.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT

Legend:

Workflow	Watch-outs	Quick wins	Benefits
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Cat.	Feature	Who it affects / Resources...
	<ul style="list-style-type: none"> <li><b>Secure Messaging &gt; Results acknowledgment</b> – HL7 acknowledgements updated to support conformant HL7 2.4 standard.</li> </ul>	<input type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT <ul style="list-style-type: none"> <li><a href="#">Send and follow up eReferrals</a> (KB article)</li> </ul>
	<ul style="list-style-type: none"> <li><b>Secure Messaging &gt; Results acknowledgment</b> – Scheduled tasks run daily to identify sent messages not acknowledged or have received a negative acknowledgement.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT <ul style="list-style-type: none"> <li><a href="#">Set up results acknowledgement and notifications</a> (KB article)</li> </ul>
	<ul style="list-style-type: none"> <li><b>Secure Messaging</b> – Letters now sent via HL7 2.4 with a PDF display segment when a compatible online directory and recipient chosen.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Secure Messaging &gt; Medicare certificates</b> – Dual NASH SHA-1 certificate detected if a site imports a certificate with a policy number of 1.10.1.1, disabling the Medicare radio button in the import certificate utility.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Medicare Refunds &gt; Online claiming</b> – <i>Apply filters</i> button added to the Online Claiming screen to stop refresh slowness.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Medicare Refunds &gt; Report</b> – Management Reports show service adjustments as <i>'Written off'</i> and payment adjustments with a status of <i>'Medicare or DVA refund'</i>.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input type="checkbox"/> Clinicians <input type="checkbox"/> IT <ul style="list-style-type: none"> <li><a href="#">Management reports</a> (Saffron Series MC)</li> </ul>
	<ul style="list-style-type: none"> <li><b>Prescribing &gt; Contact notes</b> – New contact note reason <i>'eScript Token'</i> added and will automatically be created when an eScript is prescribed.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input checked="" type="checkbox"/> Admin/Reception <input checked="" type="checkbox"/> Clinicians <input type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Prescribing &gt; eScripts</b> <ul style="list-style-type: none"> <li>– tokens can be sent via BHA or SMS, Bp Comms credits required.</li> <li>– eScripts can be resent via BHA or SMS</li> <li>– eScripts sent via Bp Comms to patients instead of eRx.</li> </ul> </li> </ul>	<input checked="" type="checkbox"/> Practice Managers <input type="checkbox"/> Admin/Reception <input checked="" type="checkbox"/> Clinicians <input checked="" type="checkbox"/> IT

Legend:

Workflow	Watch-outs	Quick wins	Benefits
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Cat.	Feature	Who it affects / Resources...	
	<ul style="list-style-type: none"> <li><b>Prescribing</b> – Both quantity (no. of units) and unit size (e.g., 30 grams) sent to eRx when prescribing a cream or similar type of drug.</li> </ul>	<input type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception
		<input checked="" type="checkbox"/> Clinicians	<input type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Prescribing &gt; RTPM</b> – Medications prescribed by eScript checked against NDE when sent.</li> </ul>	<input type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception
		<input checked="" type="checkbox"/> Clinicians	<input type="checkbox"/> IT
		<ul style="list-style-type: none"> <li><a href="#">Real Time prescription monitoring</a> (KB article)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>Prescribing &gt; Utilities</b> – Bp Utilities updated to handle new password security parameters.</li> </ul>	<input type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception
		<input type="checkbox"/> Clinicians	<input checked="" type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>NCSR &gt; Patient record</b> – Reason column fills full width of notifications table when screen expanded.</li> </ul>	<input type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception
		<input checked="" type="checkbox"/> Clinicians	<input type="checkbox"/> IT
		<ul style="list-style-type: none"> <li><a href="#">NCSR</a> (Saffron Series MC)</li> </ul>	
<ul style="list-style-type: none"> <li><b>NCSR &gt; Patient record</b> – NCSR data automatically updated when patient's record opened.</li> </ul>	<input type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception	
	<input checked="" type="checkbox"/> Clinicians	<input type="checkbox"/> IT	
<ul style="list-style-type: none"> <li><b>Other &gt; Appointment Book</b> – Loads and refreshes significantly faster.</li> </ul>	<input type="checkbox"/> Practice Managers	<input checked="" type="checkbox"/> Admin/Reception	
	<input type="checkbox"/> Clinicians	<input type="checkbox"/> IT	
<ul style="list-style-type: none"> <li><b>Other &gt; Auditing</b> – <i>Bp Utilities &gt; Security audit</i> can be exported as CSV document containing data on screen according to selected filters.</li> </ul>	<input type="checkbox"/> Practice Managers	<input checked="" type="checkbox"/> Admin/Reception	
	<input type="checkbox"/> Clinicians	<input type="checkbox"/> IT	
<ul style="list-style-type: none"> <li><b>Other &gt; Database viewer account</b> – BPSRawData and other views in the Database Browser utility will not have access to SCID (eRx) and Barcode (MediSecure) columns in any table.</li> </ul>	<input type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception	
	<input type="checkbox"/> Clinicians	<input checked="" type="checkbox"/> IT	
<ul style="list-style-type: none"> <li><b>Other &gt; eRx</b> – Blank Medicare expiry fields transmitted as 'NULL' to eRx.</li> </ul>	<input type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception	
	<input checked="" type="checkbox"/> Clinicians	<input type="checkbox"/> IT	
<ul style="list-style-type: none"> <li><b>Other &gt; Installation</b> – SQL Server 2019 an option for new installations of Bp Premier Saffron.</li> </ul>	<input type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception	
	<input type="checkbox"/> Clinicians	<input checked="" type="checkbox"/> IT	
<ul style="list-style-type: none"> <li><b>Other &gt; Patient Demographics</b> – 'Practice nurse' users can be selected as a patient's <b>Usual Doctor</b> in demographics.</li> </ul>	<input type="checkbox"/> Practice Managers	<input checked="" type="checkbox"/> Admin/Reception	
	<input checked="" type="checkbox"/> Clinicians	<input type="checkbox"/> IT	



Legend:

Workflow	Watch-outs	Quick wins	Benefits
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Cat.	Feature	Who it affects / Resources...	
	<ul style="list-style-type: none"> <li><b>Prescribing &gt; eScripts</b> – Additional information (e.g., 'for ocular treatment only') included in eScript depending on practice location and user category of the prescriber.</li> </ul>	<input type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception
		<input type="checkbox"/> Clinicians	<input type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Prescribing</b> – 'Consent to Upload to ASL' checkbox added to <b>Add/Edit Rx</b> workflow to indicate that Rx will be uploaded to the patient's ASL.</li> </ul>	<input type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception
		<input checked="" type="checkbox"/> Clinicians	<input type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>Prescribing &gt; RTPM</b> – 'Enable real-time prescription monitoring' checkbox available in user preferences for all Australian states. NB: RTPM is currently available in Victoria only.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception
		<input type="checkbox"/> Clinicians	<input type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>NCSR &gt; FHIR</b> – New 'FHIR' tab added to <i>Setup &gt; Configuration</i> for setting FHIR permissions for FHIR-enabled vendors.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception
		<input type="checkbox"/> Clinicians	<input checked="" type="checkbox"/> IT
		<ul style="list-style-type: none"> <li><a href="#">Set up a FHIR online directory</a> (KB article)</li> </ul>	
	<ul style="list-style-type: none"> <li><b>NCSR &gt; FHIR</b> – Install FHIR API on server and run ports utility run before configuring FHIR-enabled vendors.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception
	<input type="checkbox"/> Clinicians	<input checked="" type="checkbox"/> IT	
	<ul style="list-style-type: none"> <li><a href="#">Set up a FHIR connection</a> (KB article)</li> </ul>		
	<ul style="list-style-type: none"> <li><a href="#">Setting up FHIR for NCSR</a> (QRG PDF)</li> </ul>		
<ul style="list-style-type: none"> <li><b>NCSR &gt; FHIR</b> – User alert if FHIR API not installed when setting permissions in <i>Setup &gt; Configuration &gt; FHIR</i>.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception	
	<input type="checkbox"/> Clinicians	<input checked="" type="checkbox"/> IT	
<ul style="list-style-type: none"> <li><b>NCSR &gt; FHIR</b> – New <b>Port</b> setting in the 'FHIR' tab to choose port used by FHIR service.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception	
	<input type="checkbox"/> Clinicians	<input checked="" type="checkbox"/> IT	
<ul style="list-style-type: none"> <li><b>NCSR</b> – NCSR integration enabled for <b>practice</b> in <i>Configuration</i>.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception	
	<input checked="" type="checkbox"/> Clinicians	<input checked="" type="checkbox"/> IT	
	<ul style="list-style-type: none"> <li><a href="#">Set up NCSR Integration</a> (KB article)</li> </ul>		
<ul style="list-style-type: none"> <li><b>NCSR</b> – NCSR integration enabled for <b>provider</b> in <i>User preferences</i>.</li> </ul>	<input checked="" type="checkbox"/> Practice Managers	<input type="checkbox"/> Admin/Reception	
	<input type="checkbox"/> Clinicians	<input checked="" type="checkbox"/> IT	

Legend:

Workflow	Watch-outs	Quick wins	Benefits
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Cat.	Feature	Who it affects / Resources...	
	<ul style="list-style-type: none"> <li><b>NCSR</b> – Notifications written to the patient record by the NCSR utility, and then displayed in the notifications panel for actioning.</li> </ul>	<input type="checkbox"/> Practice Managers <input checked="" type="checkbox"/> Clinicians	<input type="checkbox"/> Admin/Reception <input type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>NCSR</b> – Open <b>NCSR Hub</b> from the patient clinical record.</li> </ul>	<input type="checkbox"/> Practice Managers <input checked="" type="checkbox"/> Clinicians	<input type="checkbox"/> Admin/Reception <input type="checkbox"/> IT
			<ul style="list-style-type: none"> <li><a href="#">Using the NCSR Hub</a></li> </ul>
	<ul style="list-style-type: none"> <li><b>NCSR</b> – Open <b>NCSR Forms screen</b> from the patient clinical record.</li> </ul>	<input type="checkbox"/> Practice Managers <input checked="" type="checkbox"/> Clinicians	<input type="checkbox"/> Admin/Reception <input type="checkbox"/> IT
	<ul style="list-style-type: none"> <li><b>NCSR &gt; Patient Record</b> – NCSR Hub or Appropriate form opens when NCSR notification ticked.</li> </ul>	<input type="checkbox"/> Practice Managers <input checked="" type="checkbox"/> Clinicians	<input type="checkbox"/> Admin/Reception <input type="checkbox"/> IT

Legend:

 Workflow	 Watch-outs	 Quick wins	 Benefits
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