



JADE

Bp Premier Clinical Software Conversion Guide

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Intended for usage with Bp Premier version Jade SP2 and later. Some features in this User Manual may be available only in versions later than Jade.

Conversion Checklist

Converting your data from one software package to another can be a daunting process. To facilitate a smooth transition to Bp Premier, the practice should prepare for both the Trial and Live conversions.

The Conversion Checklist below provides a summary of the steps involved when performing a trial and then live conversion. Read this checklist in conjunction with the detailed instructions for your clinical package to gain an overview of the conversion process.

IMPORTANT To mitigate issues, Best Practice Software insists that all sites perform a trial conversion **at least 2 weeks prior** to the expected Go Live date.

How to get assistance

Best Practice Software provide a conversion utility free of charge to enable you to convert your data to Bp Premier. The conversion process would be performed by your own staff or your IT technician. General Products Support will provide as much assistance as possible via phone on 1300 40 1111 or email support@bpsoftware.net.

The Best Practice Forum on our website www.bpsoftware.net is an invaluable source of information, advice, views, ideas, questions and answers from hundreds of Bp Premier users across Australia. Click on **Register** in the menu at the top to join.

To access the online knowledge base for Bp Premier, select Help > Online from inside the software.

Obtain a trial licence

Contact our relationship support team on 1300 40 1111 for a quote to install Bp Premier. You can obtain a free trial licence to evaluate the software before purchase.

Go to www.bpsoftware.net and select **Learning** to see the training options available for Bp Premier.

Trial conversion

To run the trial and live conversion, you will need a spare computer referred to as the conversion machine. You cannot use your practice's current live database for a trial or live conversion.

1. Confirm your server PC and network meet the hardware, hard disk space and operating system requirements.
2. Contact Best Practice Software support to obtain the required conversion utility, matching Bp Premier version and free trial licence.
3. Ensure the pre-converted data in the original software database is in good condition.
4. Back up the original practice management software database.
5. Install the original practice management software on your conversion machine and restore the backup you just made to this installation.

6. Install the version of Bp Premier obtained from Best Practice Software on a conversion machine as a **Server** installation. This computer can be the same machine as in step 5.
7. Run the conversion utility on the conversion machine and follow the prompts.
8. Check data in the trial Bp Premier database thoroughly to ensure that all data converted correctly.

IMPORTANT Best Practice Software recommends that the principal doctors perform a thorough check of as many patient records as possible to ensure that all data is present and accessible. We suggest opening a range of patients in your current application (long term, medium term, and new patients) and comparing the data with this same patient in Bp Premier. We also recommend checking the last patient seen before the conversion to ensure that the most recent data has been converted.

9. Complete, sign, and fax or email the form *BP_FAQ-Trial Conversion completion form* to General Products Support on +61 7 4153 2093. Email the file *BPSConversion.log* to support@bpsoftware.net. This file can be found in the folder you installed the conversion utility in.
10. Best Practice Software Support will contact you with your 30 day activation licence key.

Live conversion

Carry out the following steps if you have successfully performed a trial conversion with no issues, and have confirmed the most recent data has been converted.

1. Ensure you have your invoice and 30 day activation licence key. If you have not received your licence key after submitting your Trial Conversion completion form, contact Best Practice Software support.
2. Compare the drug database date in Bp Premier (**Help > About**) with the most recent drug database update from www.bpsoftware.net. If your installation does not have the most recent drug database, download and install an incremental or comprehensive update.
3. On conversion day, perform a complete backup of the old practice management system and database, including any components specific to that software package, such as MD3 ManageEzy documents.
4. Install the conversion utility on the conversion machine. Run the conversion utility.
5. Enter the 30 day activation key when prompted. This will convert your trial version of Bp Premier to a licensed version.
6. Install the [latest version](#) of Bp Premier as a **server** on your live server. This is the server that will be used during daily operation.
7. Install the [latest version](#) of Bp Premier as a **client** installation on all workstations.
8. Open Bp Premier on each workstation and connect to the Bp Premier server.

Post-conversion check

1. Check ALL data carefully to ensure that conversion has been successful. Access the last patient updated in the old system prior to the conversion to ensure the visit record is present.
2. Set up practice details and ensure that the licence key is for the correct number of users. Ensure that only valid locations are displayed in practice details.
3. Review user permissions and reset user passwords. Ensure one trusted user has full permissions, and that the password for this user is secured in a fireproof safe for emergency access.

4. Back up the converted live data from your conversion machine.
5. Restore the converted data to your live Bp Premier server.
6. Disable all shortcuts to the old software to ensure staff can't accidentally use the wrong system.
7. Have each user log into their Bp Premier workstation and configure their printer settings and preferences.
8. Undertake training for staff new to Bp Premier.

Converting from other software with no conversion utility

There are a number of third party clinical packages that require a manual conversion to transfer patient details to Bp Premier, including:

- Monet
- Surgiware
- RXMedical
- CSS
- ZedMed
- Compudoc.

Best Practice Software recommends carrying out a trial conversion from your old software at least two weeks prior to your proposed Go Live date.

Follow the instructions to convert data from another practice management software. Read the checklist summary in Conversion Checklist on page 3 before following the instructions.

Obtain update-to-date version of Bp Premier

Please check with General Products Support via phone on 1300 40 1111 or email support@bpsoftware.net. The latest version at present is Bp Premier - Jade SP2 edition but it is recommended to confirm the version before proceeding.

NOTE If an (old) previous installation of Best Practice is present on the server you should either upgrade to this latest version or uninstall completely and reinstall if the version is too old to upgrade.

Confirm the Hardware Requirements

Ensure all machines that will be required to run Bp Premier meet the hardware system requirements.

Confirm Hard Disk space Requirements

By default, Bp Premier program files and databases are installed to the C:\ drive. It is recommended that prior to GO LIVE that an estimate of the disk space requirements is made to ensure that there is sufficient space on the server on the C:\ drive to cater for:

- Size of the Bp Premier databases (following the import of your clinical data)
- Sufficient room for expansion of the databases due to normal operation.

If **compressed** backups are to be performed, there will need to be free space approximately twice the size of the Bp Premier databases to allow for temporary files to be created during the backup process (for example, 6 GB of databases will need approximately 18GB free space to perform compressed backups)

To check the size of the databases following the data import, check the size of the databases stored in the folders (these are the default locations – you may have installed your data to another folder during installation):

- **SQL Express 2008 Installations** - C:\Program Files\Microsoft SQL Server-\MSSQL10.BPSINSTANCE\MSSQL\DATA
- **SQL Express 2008R2 Installations** - C:\Program Files\Microsoft SQL Server\MSSQL10_50.BPSINSTANCE\MSSQL\DATA
- **SQL Express 2012 Installations** - C:\Program Files\Microsoft SQL Server-\MSSQL11.BPSINSTANCE\MSSQL\DATA
- **SQL Express 2014 Installations** - C:\Program Files\Microsoft SQL Server-\MSSQL12.BPSINSTANCE\MSSQL\DATA

TIP The full installation DVD of Bp Premier provides the ability to create your data in an alternate location.

Confirm software required for data migration

The procedure required to move your data without a utility requires a software printer. There are several options available for this and commonly available programs include:

- Microsoft Office Document Image Writer or other image viewing software
- Adobe Acrobat PDF writer
- Cute PDF writer, a free PDF Software Printer.

Move your data across

There are two options for transferring your data to Bp Premier:

- Write a database migration script unique to your installation
- Transfer patient demographics to Bp Premier and transfer patient information as needed.

Option 1 - Write a database transfer utility or script

This option is not a process that Best Practice Software has input in and therefore it is the practice's responsibility to ensure the data that's converted by the 3rd party is accurate and complete. You may need an database administrator or IT technical resource to create a migration script for your installation.

Once these checks are complete, the practice should complete the form BP_FAQ-Trial Conversion completion form external.pdf and fax to General Products Support on +61 7 4153 2093. Best Practice Software will then issue a 30 day key and invoice.

Option 2 - Perform a patients.in demographics transfer and transcribe patient information

IMPORTANT As the processes requires interaction by staff other than Best Practice Software, any data that is lost during this procedure is the responsibility of the practice.

This process is performed in two parts. The first is to generate the list of patients and the second is to import the patient information.

NOTE Items like prescriptions, outstanding pathology requests, reminders, actions and allergies will need to be entered again.

Import patient demographics

1. Install Bp Premier as a Server
2. On first opening Bp Premier, new practice details and a new user will need to be created
3. Configure Bp Premier to link to an external billing package.
4. In your existing clinical package, ensure that the patients that are active are the patients required for the transfer.
5. From your existing clinical package, perform a bulk demographic export. This should create a file with the demographics of all of the currently active patients. The file must conform to the patients.in format (ASCII v2 or v3).
6. Rename the file created in step 3 to patients.in.
7. Copy this file into the location that Bp Premier is configured to find this file.
8. Bp Premier will import this file and generate a list of patient demographics with empty clinical records
9. Configure the Clinical and Management components of Bp Premier.
10. Part of this setup should include a new document type, which can be added in **Setup > Configuration > Lists**. Click the **Add** button below the list and enter a new category for health summaries e.g. **Converted Health Summary**.

Copy clinical data across

1. Ensure the printer settings in your existing package are set to use the software printer mentioned in the Prerequisites section above.
2. For the process of printing a patient health summary or complete patient record from your existing package, consult their documentation and help files. Ensure that when this is being printed to your software printer, that you save it in an accessible location.
3. Once you have printed the health summary to a PDF or similar file you can now import this into Bp Premier.
4. Open the patient record in Best Practice and click on the Patient Tree item for Correspondence In.
5. Click the **Add** button and navigate to the file created from the software printer and open it.
6. You will be prompted for the document information. Enter details relevant to the file.

This information will now be accessible from the patient's Correspondence In. Each patient's prescriptions, outstanding pathology requests, reminders, actions and allergies will need to be entered again.

TIP It is worthwhile making a note against a patient record or inactivating them completely in your existing system once a patient has been exported so that you can see whether or not you need to produce an electronic summary for that patient.

TIP The appointment book can be a useful tool in staying days or weeks ahead of what's booked by doing the following day or week's patients in advance.

As the process in this FAQ isn't something that can be easily done for all patients at once, conversion will be a continuing process until all of the patients have been brought across. There will be no log files generated as part of this process. However, Best Practice Software need to be advised of your expected Go Live date and practice details so that a licence key and invoice can be generated.

