Bp Premier Pathology and Radiology Guide

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Best Practice Software Pty Ltd
PO Box 1911
Bundaberg Queensland Australia 4670
www.bpsoftware.net

Best Practice Software New Zealand Ltd
PO Box 1459
Hamilton New Zealand 3240

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Last updated: July 2018

Intended for usage with Bp Premier version Jade SP1 and later. Some features in this User Manual may be available only in versions later than Jade.

Understanding the pathology workflow

Pathology and radiology tests are ordered from the patient record, and the results are downloaded by third party secure messaging software to a location on the Bp Premier server hard disk. Bp Premier then imports the results files from the download folder into the database.

Request workflow

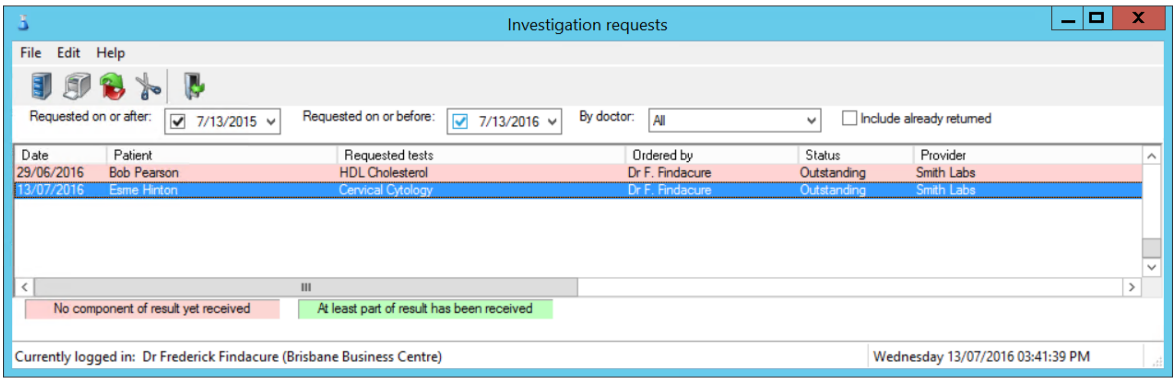
1. A provider generates an investigation request from the patient record.
2. Practice staff can review sent investigation requests to see if investigation results been returned.
3. When investigation results are imported into Bp Premier manually or by the overnight process, correctly formatted results are matched to a patient record or assigned to a provider Inbox.
4. Unmatched reports are reviewed and assigned manually from the Incoming Reports screen.
5. A provider reviews the incoming results in their Inbox and actions any results.
6. Practice staff review actioned results in the Followup Inbox so that patients can be contacted and return appointments booked.

If you have converted from another clinical software package, or have a backlog of outstanding requests, you may need to periodically clear outstanding requests.

Manage investigation requests

The **Investigation Requests** screen displays the investigation requests that have been ordered through Bp Premier. Use this screen to monitor outgoing requests for investigation and that results have been returned.

1. Select **View** > **Investigation requests** from the main Bp Premier screen.



2. Filter the requests displayed to a date range.
3. Select from the **By doctor** drop-down list to only show requests from a specific provider. Tick the **Include already returned** checkbox to include investigation requests that have had results returned by a pathology lab.

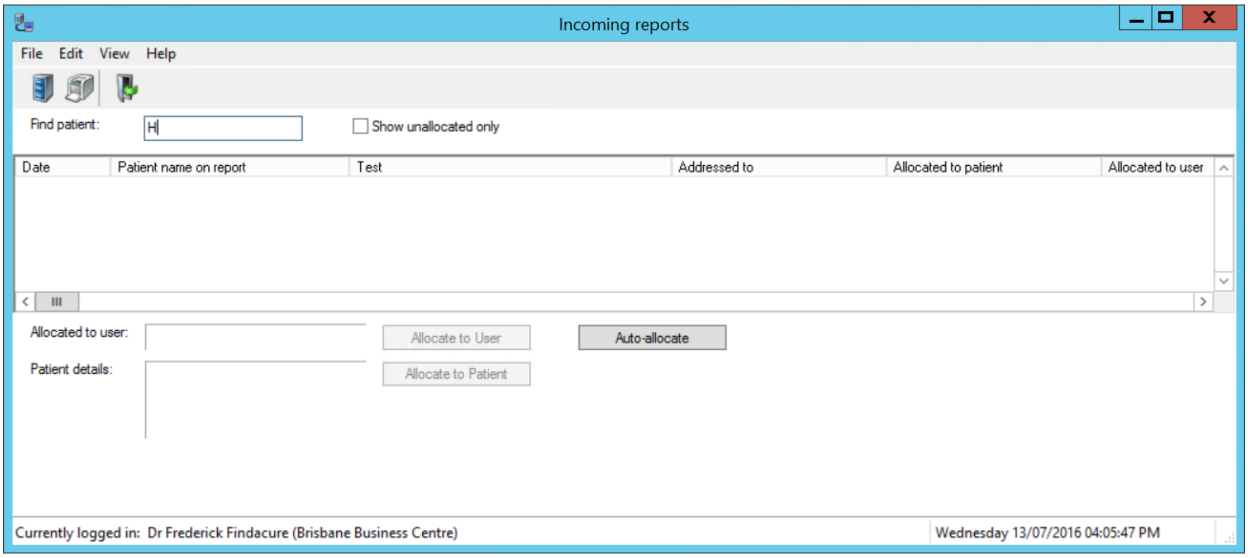
Bp Premier cannot determine automatically that a request has been received in entirety, because this data is not provided in the result file from the laboratories. You can, however, determine if at least some of the request has been returned:

- Where the result is shown in green and has a **Status** of 'Partial', the request has been partially received. This status relies on the laboratory including the order number from your request in the returned result file.
- If the result has not been returned (even partially) ,or the laboratory has not used the order number, the request will show in pink with a status of 'Outstanding'.

Manage incoming reports

This function monitors all pathology and radiology results and reports that are imported into Bp Premier. Opening the **Incoming reports** screen also forces an import of any results that are waiting to be imported.

Select **View** > **Incoming reports** from the Bp Premier main screen.



This screen shows all reports that have been received and imported into Bp Premier but have not yet been processed by the practitioner via their Inbox. Results will not appear in the patient's file until the provider has processed the result via the Inbox function.

TIP Results that cannot be matched to a patient will automatically be allocated to the provider's Inbox, unless the option in **Setup** > **Configuration** > **Don't allow unallocated reports into inbox** is selected.

In most cases, the system will automatically allocate a result to the correct patient and provider. However, if the result has patient or provider names spelt or formatted differently to the way the names were entered in Bp Premier, the result will not appear in any Inbox. You can tell if the system has not been able to match a result, because both the **Allocated to patient** or **Allocated to user** fields will be blank. Tick **Show unallocated only** at the top of the screen to show only those results that are not matched.

Any unallocated results will need to be allocated manually from this screen. To allocate a report, right-click on a report in the list and select **Allocate to Patient** or **Allocate to User**.

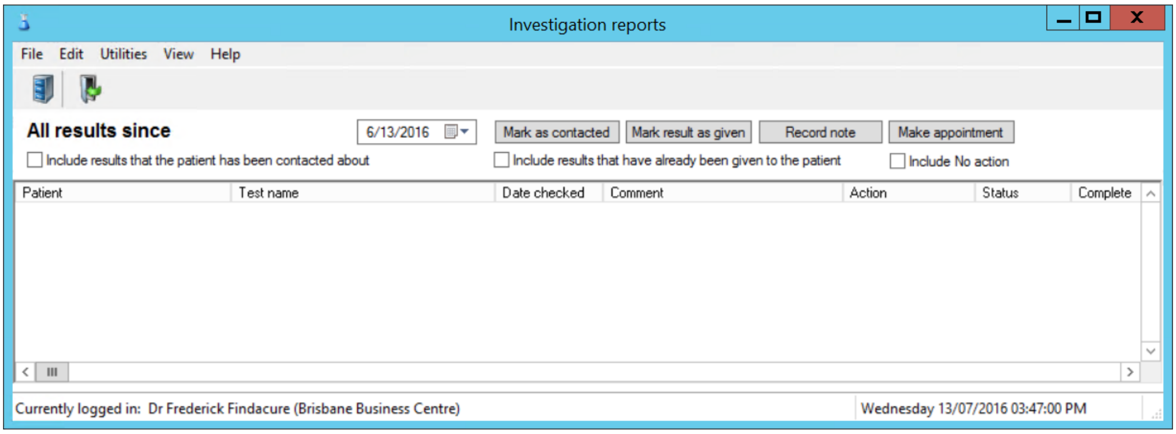
NOTE Best Practice Software recommends nominating a practice staff member to regularly check the **Incoming reports** screen to ensure that results are not missed.

View actioned investigation reports

The **Investigation Reports** screen displays all downloaded reports that have been reviewed by a provider in the 'Inbox' and had a 'Notation' and 'Action' assigned to it.

The screen allows staff to view patient results and reports, for example, when a patient calls the practice to find out if results have come back and the doctor's opinion. This screen can also be used to mark results as 'contacted' or 'given'; however, Best Practice Software recommend that you use the **Follow up Inbox** for this purpose.

1. Select **View** > **Investigation reports** on the main Bp Premier screen to display the **Investigation Reports** screen.



By default, the screen will show all results received in the last month that have not been actioned by staff (not marked as contacted or given).

2. Tick the **Show All Results** checkbox to display all investigation results.
3. Choose **File** > **Print** from the menu bar or click on the icon to print the Investigation report list.
4. To access all reports for a specific patient, select **Edit**> **Find** from the menu bar and search for the patient.

Investigation reports can be moved from one patient file to another if incorrectly allocated. Select **Edit** > **Move** and choose the correct patient using the **Select patient** screen. The report will be automatically transferred into the **Investigation reports** section of the selected patient record.

View investigation requests for a single patient

1. From the patient record, select **Request** > **List**. The **Investigation requests** screen will appear, showing all requests made for the patient.
2. Select a request and click **Mark as returned** to mark the request as returned to patient in the patient record.

View unchecked reports for a patient

A provider can view unchecked reports for a single patient.

From inside the patient record, select **Clinical** > **Unchecked reports**. The Provider's **Inbox** will open, showing any unactioned results for the patient.

Move investigation results

A report may be misfiled to the wrong section of the patient's file, or the wrong patient.

In the **Correspondence In** section of the patient record, right-click and select the option to move an entry into **Investigations** or another patient.

In the **Investigations** section of the patient record, right-click and select the option to move an entry into **Correspondence In**.

See for more information on managing results that have been allocated. See for more information on following up reports that have been actioned and require followup activities, such as booking a recall appointment.

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.

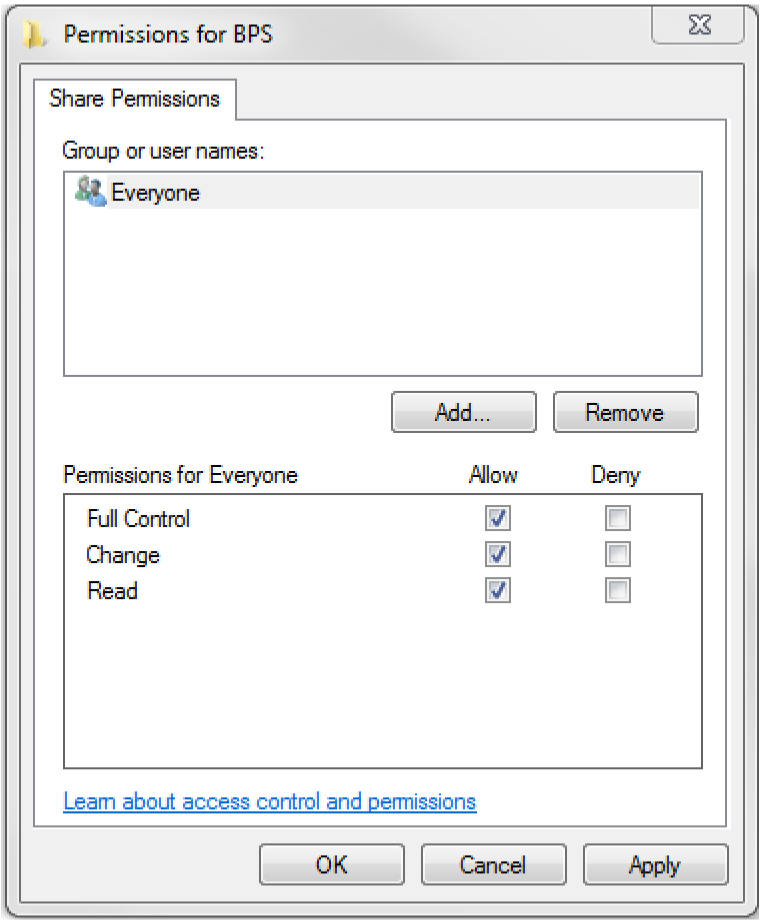
Before you begin

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**.

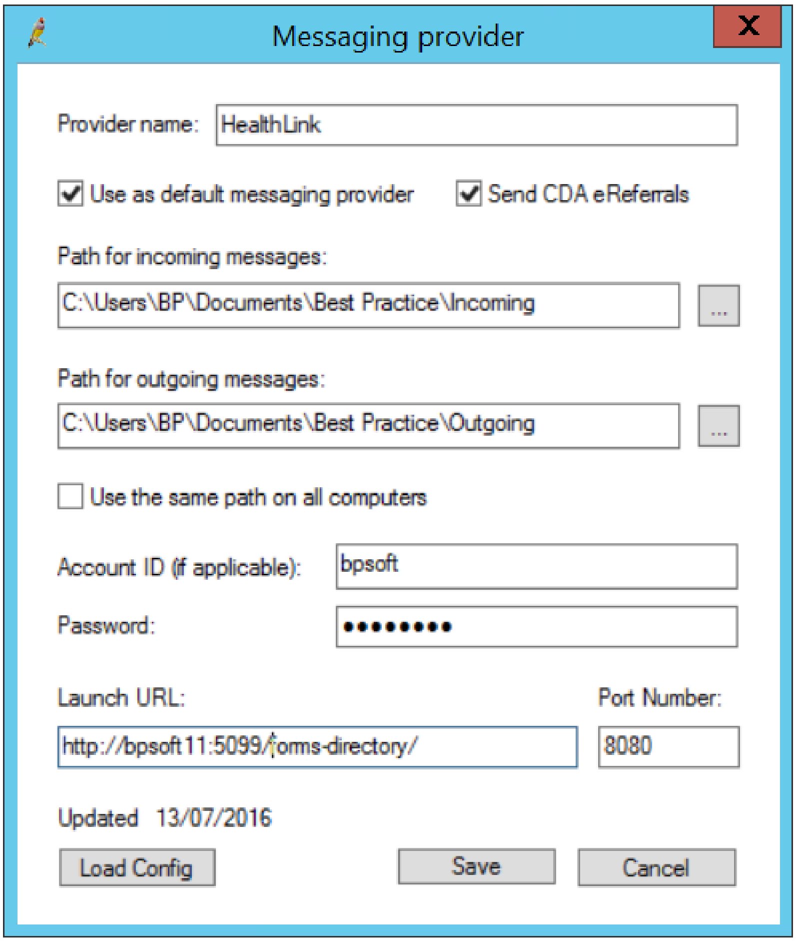


2. Click on **Advanced Sharing**, tick **Share this folder**, click on **Permissions**, select the user group **Everyone** and set **Full Control** to allowed.
3. Click **OK** to close the **Properties** screen.

Set up the 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

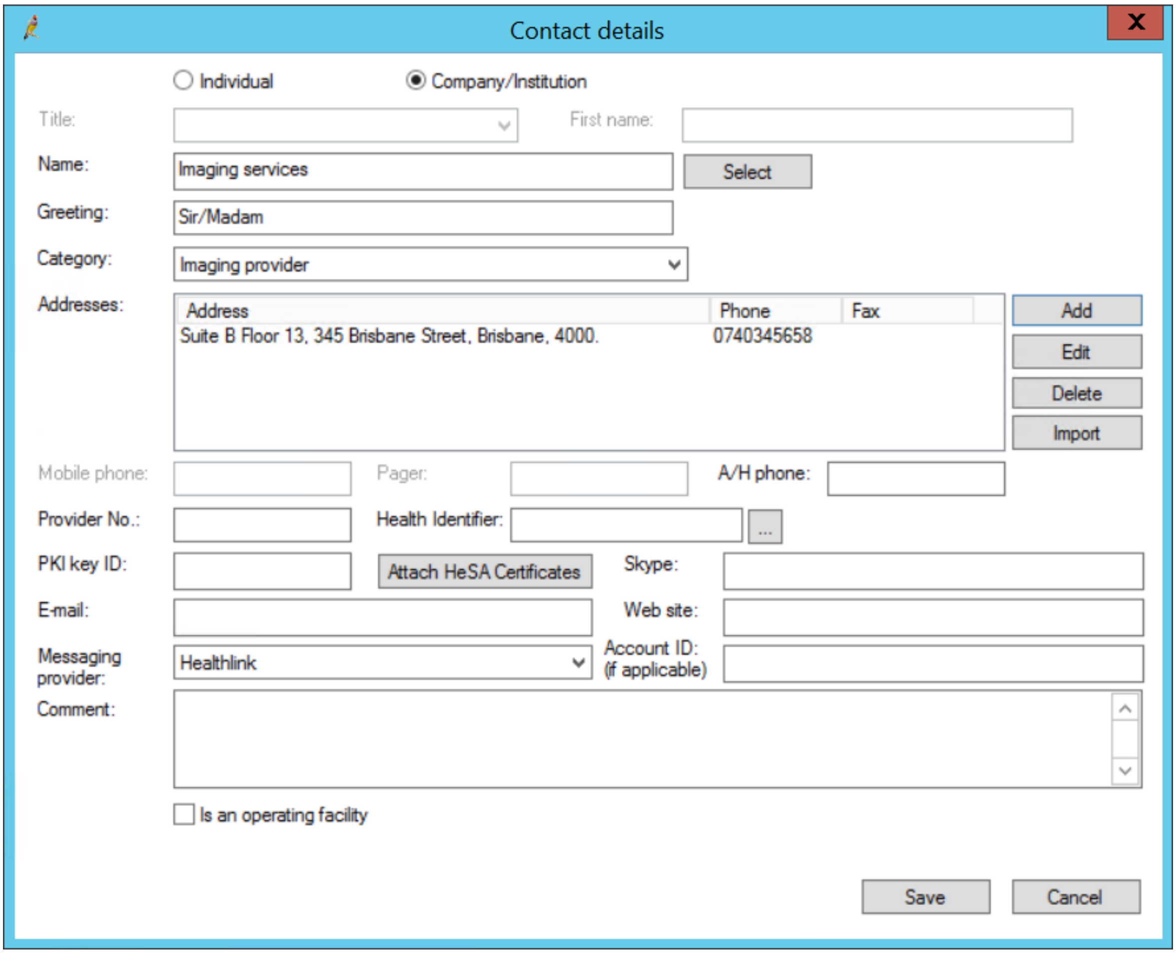
You need to configure each contact your practice will be sending messages to.

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**.

Add a pathology or imaging lab

A lab is a Bp Premier contact with a **category** of 'pathology provider' or 'imaging provider'. A user must have the **Contacts** user permission set to 'Add/Edit/Delete' to create and update lab contacts.

1. From the Bp Premier main screen, select **View** > **Contacts**. The **Contacts** screen will appear.
2. Click **Add new**. The **Contact details** screen will appear.



3. Select the **Company/Institution** radio button.
4. Select 'Pathology provider' or 'Imaging provider' from the **Category** drop down list. (If this option does not appear in the list, you will have to recreate the contact category.)
5. Complete the rest of the fields for the laboratory.
6. If the **Messaging provider** you select has **Accept CDA referrals** enabled, you will be able to send CDA-formatted eReferrals to this contact.
7. Click **Save**.

The next time an investigation request is made, the new lab will appear as an option from the **Laboratory** drop-down of the **Pathology request** or **Imaging request** screens.

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.

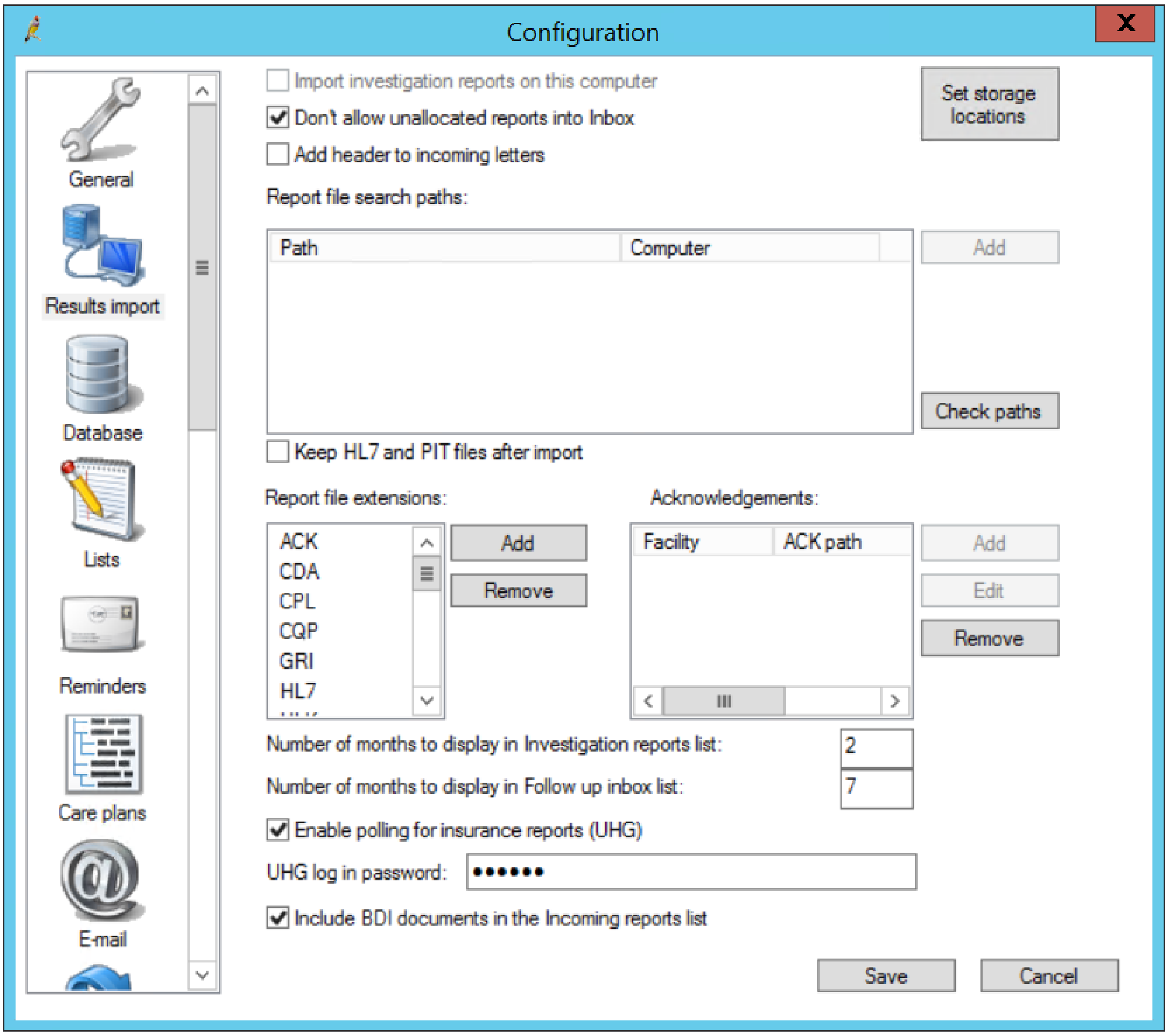
Result files that fail to import are moved to C:\ProgramData\Best Practice\Unprocessed. ‘C:\ProgramData’ depends on the version of Windows.

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.

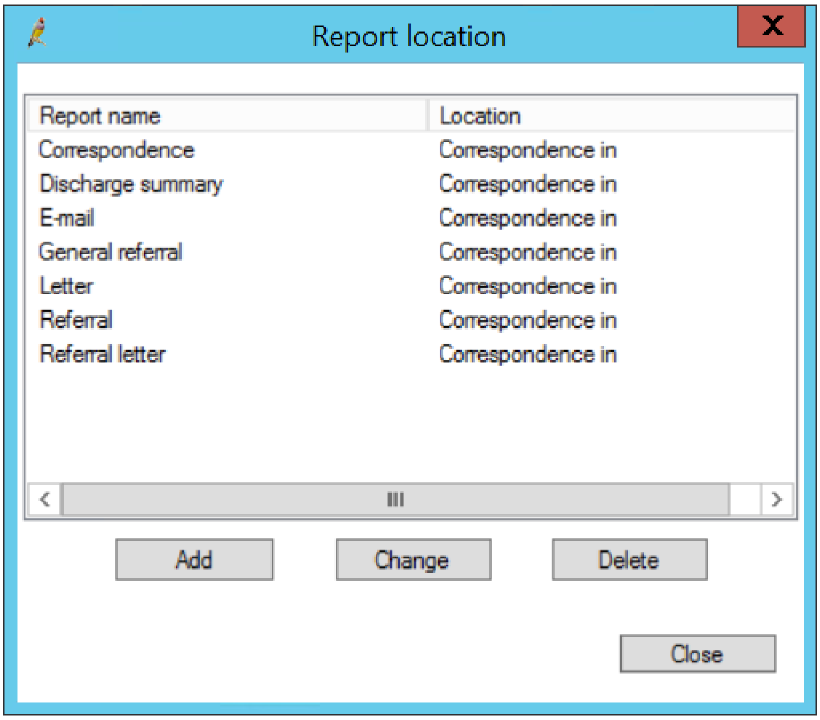


2. Set the following fields:

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.
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 **Invest-igations**.

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:

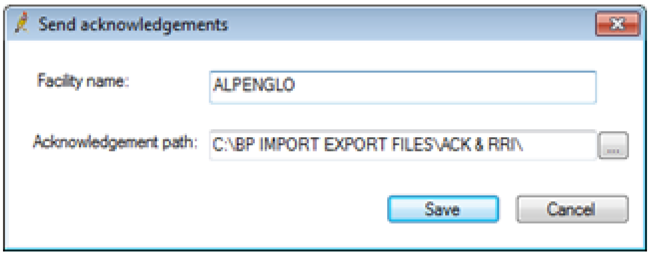
Field	Description
Keep HL7 and PIT files after import	Only tick this box if advised to do so by General Products Support to diagnose an issue with importing reports.
Report file extensions	Most labs will use the standard extension for their results file. However, additional file extensions can be added 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:

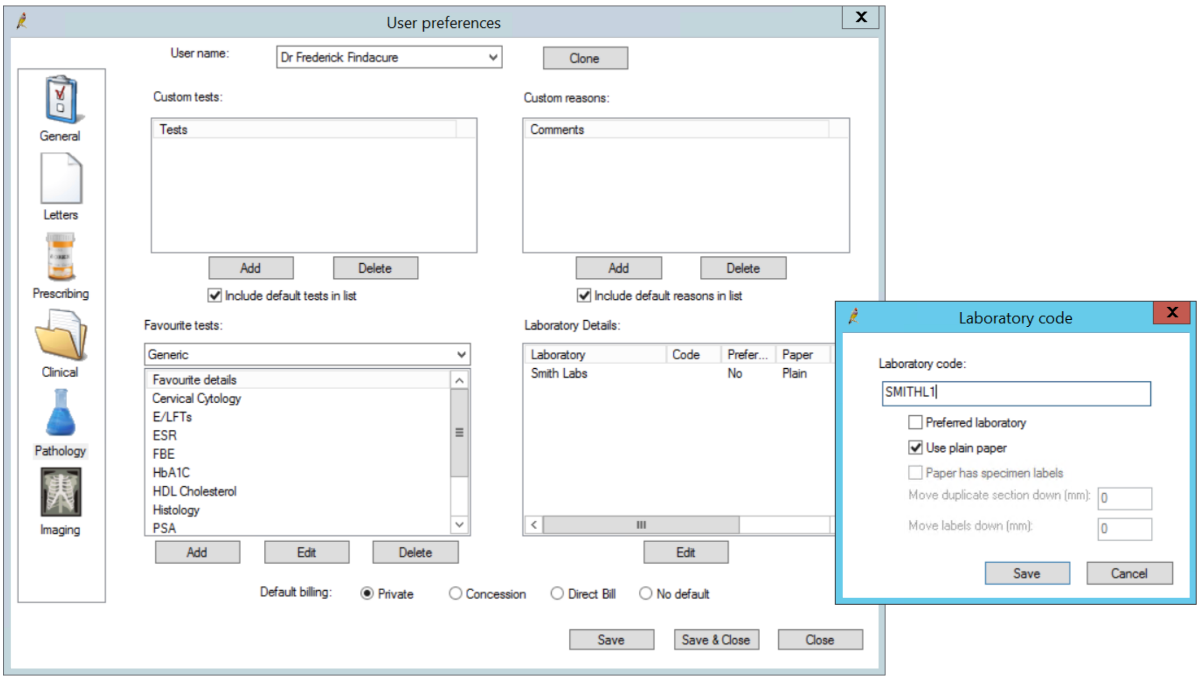
- acknowledgements related to results have the file extension '.ACK'
- acknowledgements related to reports and referrals have the file extension '.RRI'.

Set up pathology request forms

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

Set a lab's 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:

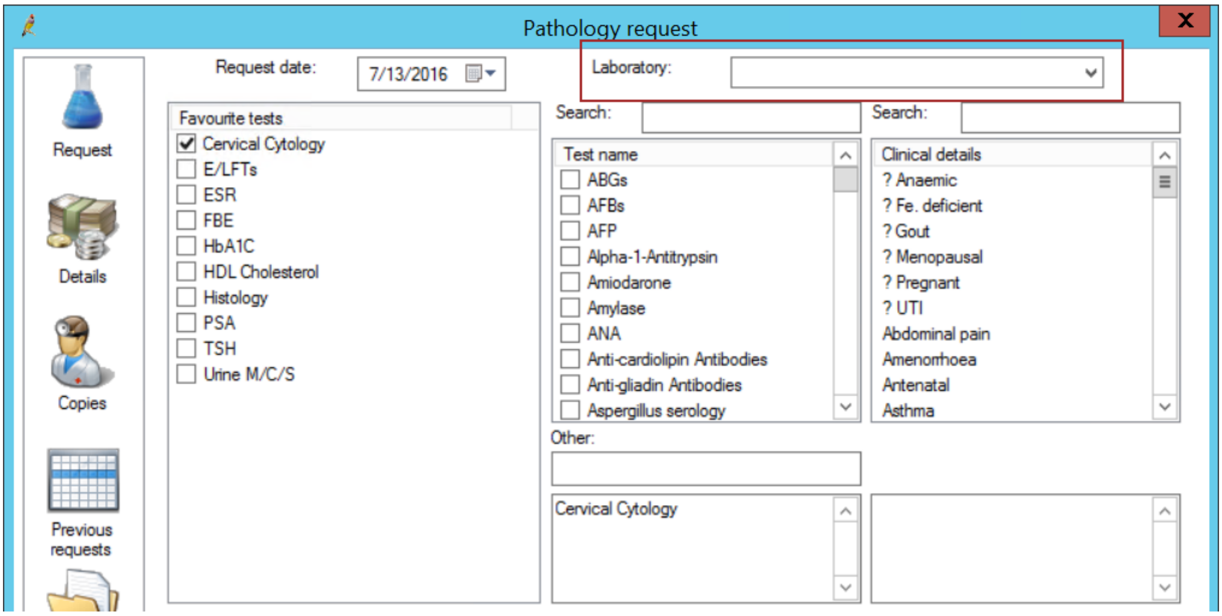
Field	Description
Laboratory code	If you are using pre-printed forms, enter the code for pathology form. The patient information will print in the correct places on the pre-printed form. Contact the pathology lab for the code.
Preferred laboratory	Tick this box if this laboratory is the user's preferred 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.

Pathology request

Patient details
Abbott Alan M 30/06/1972 101
12 Jogger St
Albany Creek 4035

Requested tests
FBC, ESR, TSH, HbA1C, PSA, Test of free text section

Clinical details
? Fe. deficient, Abdominal pain, Antenatal, Constipation, Cough

Copies to
Dr. Andrew Atherton, 143 Flinders Street, Southport, 4215.

Requesting practitioner
Dr. Frederick Findacure
1 Best Avenue
Fax: 07 7620 6677

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.

QML Pathology.
PATHOLOGY REQUEST
LABORATORY COPY
QML Pathology.
PATIENT COPY

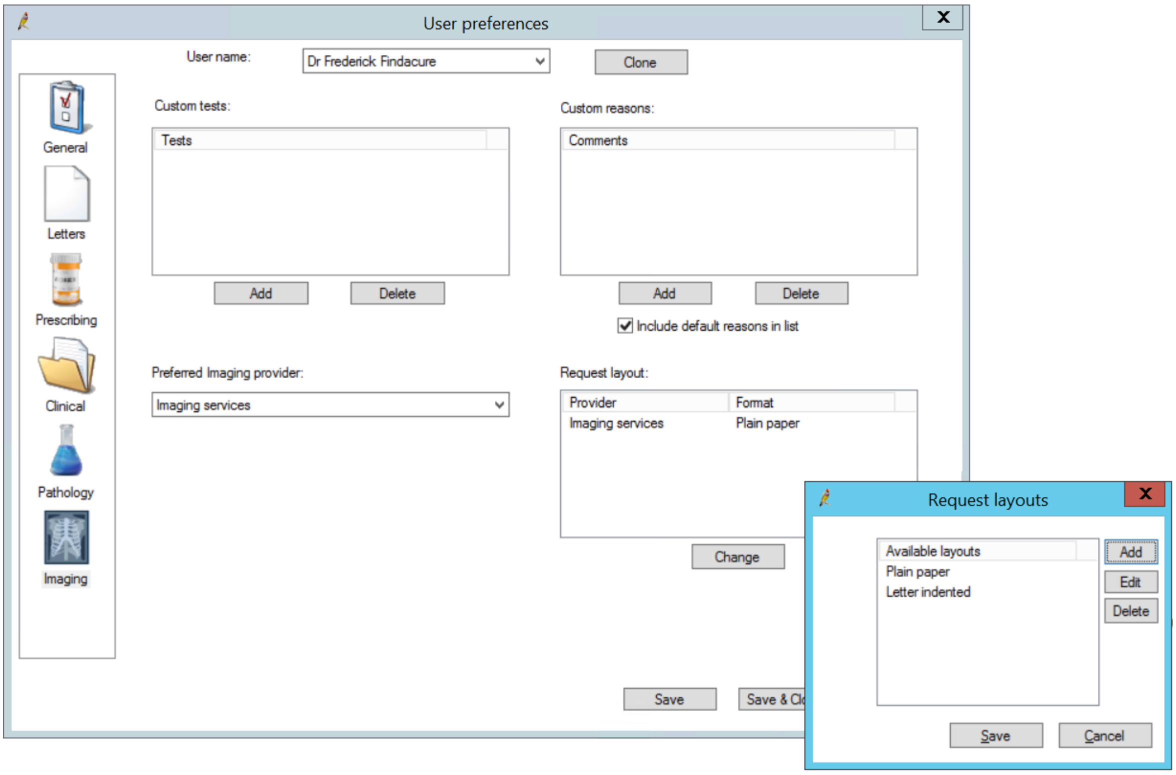
Set up radiology forms

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

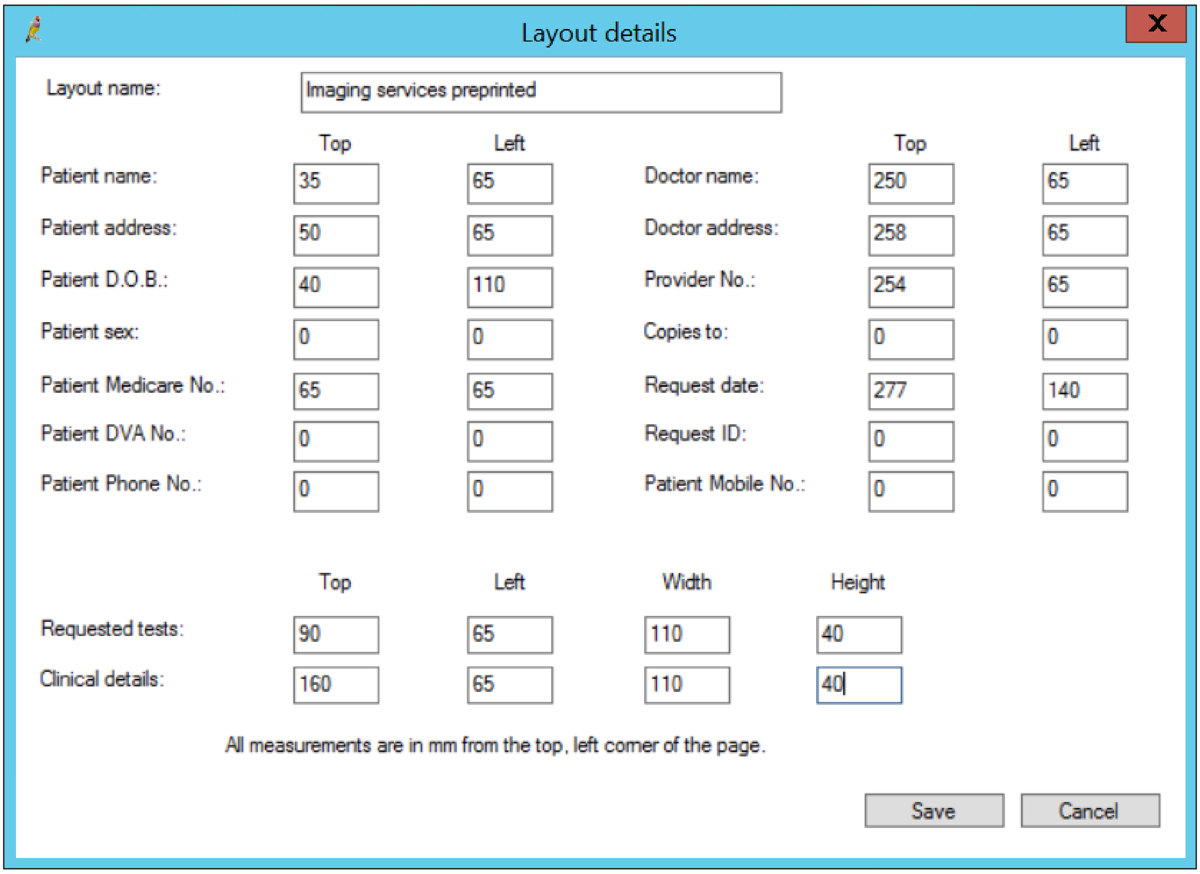
Unlike pathology forms, there is no standard radiology request form. You can assign a single request layout to more than one imaging laboratory.

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 lay-out 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.

E-order pathology and radiology

Bp Premier supports **e-ordering** of pathology and radiology investigations from laboratories that accept e-orders.

Before you begin

You will need the **NATA code** for any pathology laboratories. The NATA code determines the list of tests available from a pathology lab. If you wish to set up recommended tests based on clinical details, you will need to consult the laboratory for a recommended test list. Radiology labs do not require a NATA code for e-ordering from Bp Premier.

You may also need to install messaging software on each Bp Premier server or workstation that will be generating e-orders. The lab can tell you if you need to install any software (such as **Fetch**) and if the HL7 e-order files need to be stored on a specific location on the machine.

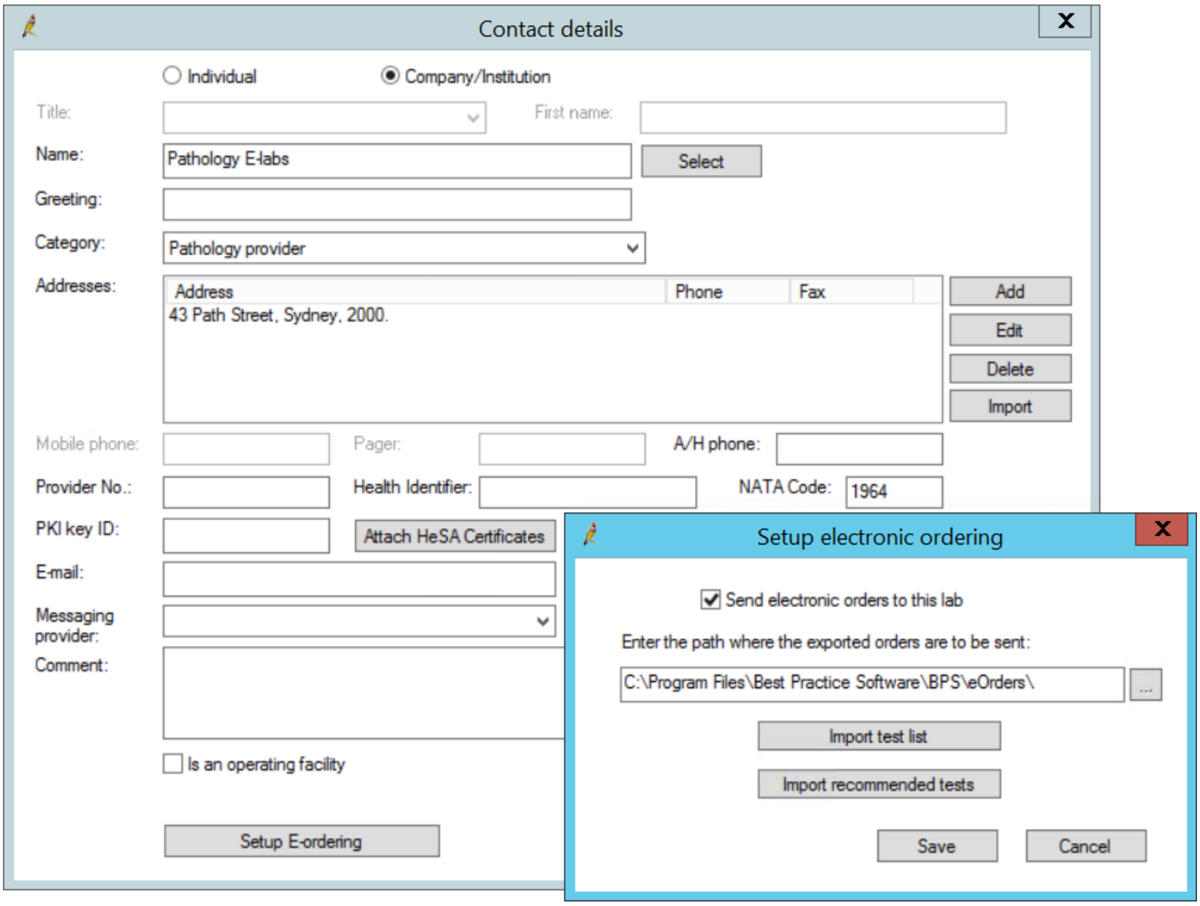
How do I update the test list?

The e-ordering test list for registered laboratories is checked for updates and included in each monthly Bp Premier drug and data update. You do not need to do anything to update the test list.

Set up e-ordering for pathology

You must add the laboratory as a contact in Bp Premier and enable e-ordering.

1. From the Bp Premier main screen, select **View** > **Contacts**. The **Contacts** screen will appear.
2. Click **Add new**. The **Contact details** screen will appear.
3. Select **Company/Institution** and select a **Category** of 'Pathology provider'.
4. Complete the rest of the contact and identity details.
5. Enter the **NATA code** for the laboratory and tab out of the field. If the NATA code is valid, the **Setup E-ordering** button will appear.
6. Click **Set up E-ordering**. The **Setup electronic ordering** screen will appear.



7. Tick **Send electronic orders to this provider**.
8. Enter the path on this machine to store electronic requests. The pathology laboratory can tell you if e-order files need to be in a specific folder.

   If the nominated folder does not exist, Bp Premier will not create the folder, but will place e-order files in a default system folder when the request is generated.

9. The **Import test list** button allows you to manually update the test list for the NATA code.

NOTE Test lists are updated with each Bp Premier data update; you will very rarely be required to manually update the list.

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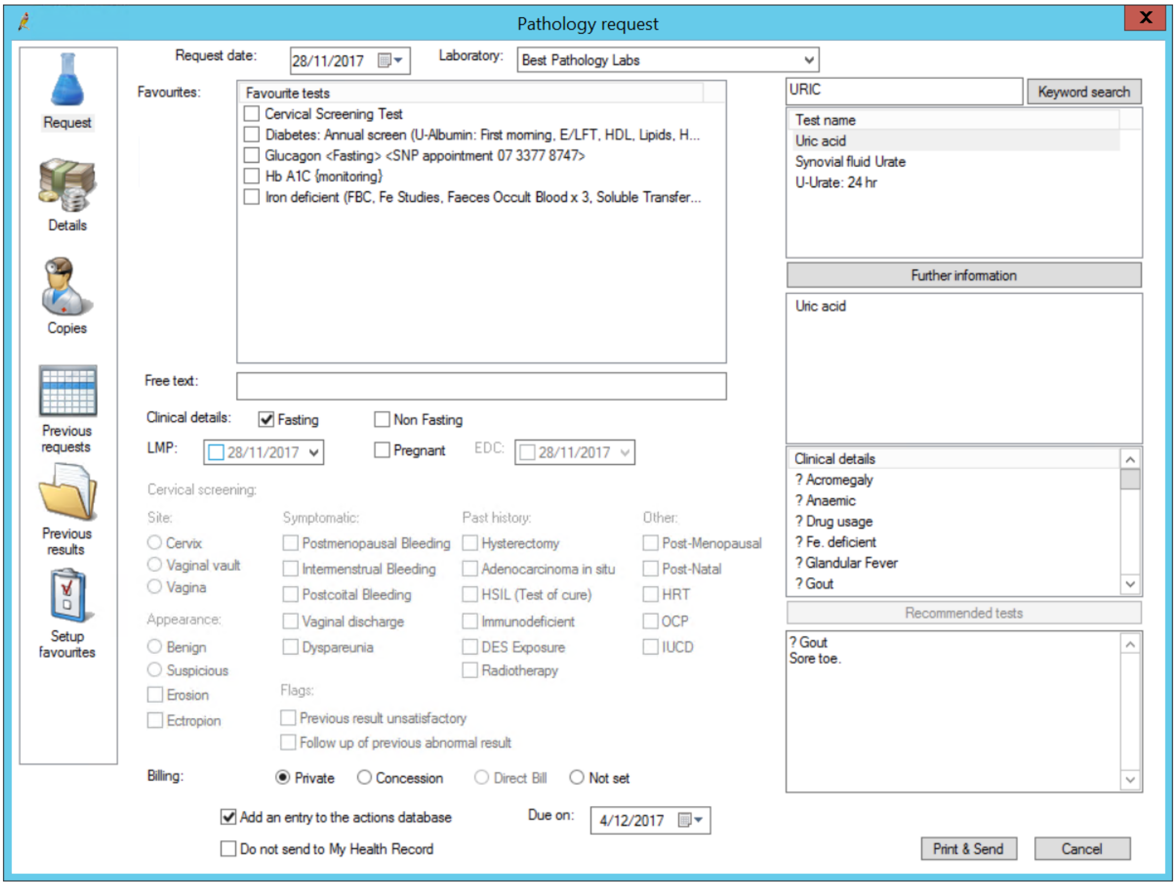
10. If the pathology lab has supplied you with a list of recommended tests, click **Import recommended tests** and supply the location of the recommended tests .csv file.
11. Click **Save** and click **Save** again to save the Contact record.

You can now send e-orders to this laboratory.

Submit a pathology e-order

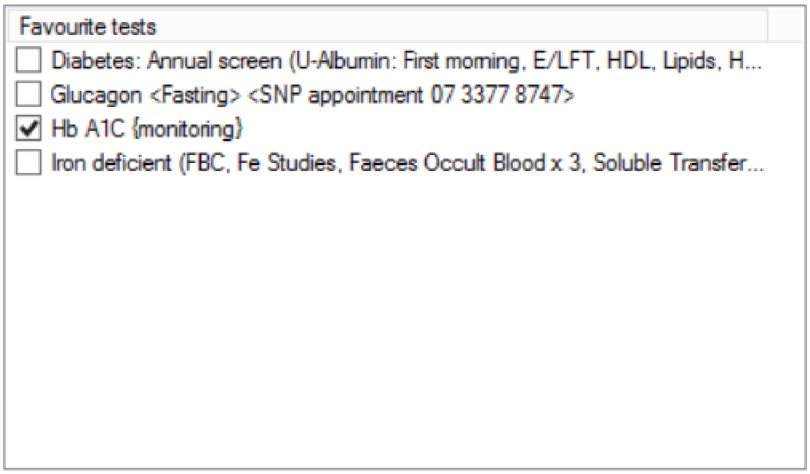
1. Open the patient record for whom you are requesting pathology.
2. Select **Request** > **Pathology** from the menu. The **Pathology Request** screen will appear.
3. If the e-ordering lab is set to the provider's preferred laboratory (**Setup** > **Preferences** > **Pathology**), the **Pathology Request** screen will show the 'e-ordering' version of the screen.

   Otherwise, select the e-ordering **Laboratory** from the drop-down menu at the top of the screen. The screen will change to reflect e-ordering.



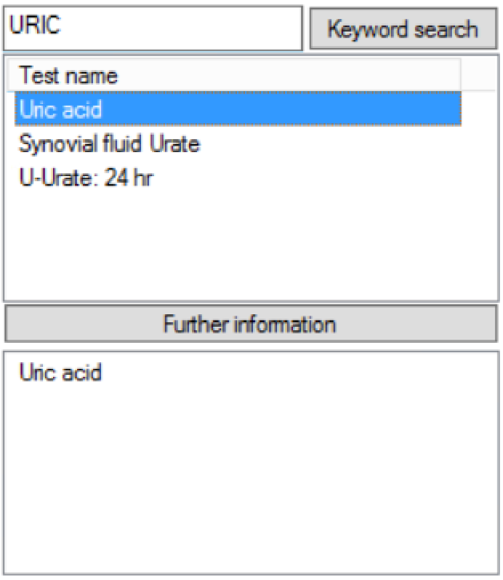
Order favourites

4. If you have a list of **Favourite tests** set up, tick the tests you want to request. Ticked tests will be added to the test list on the right hand side.



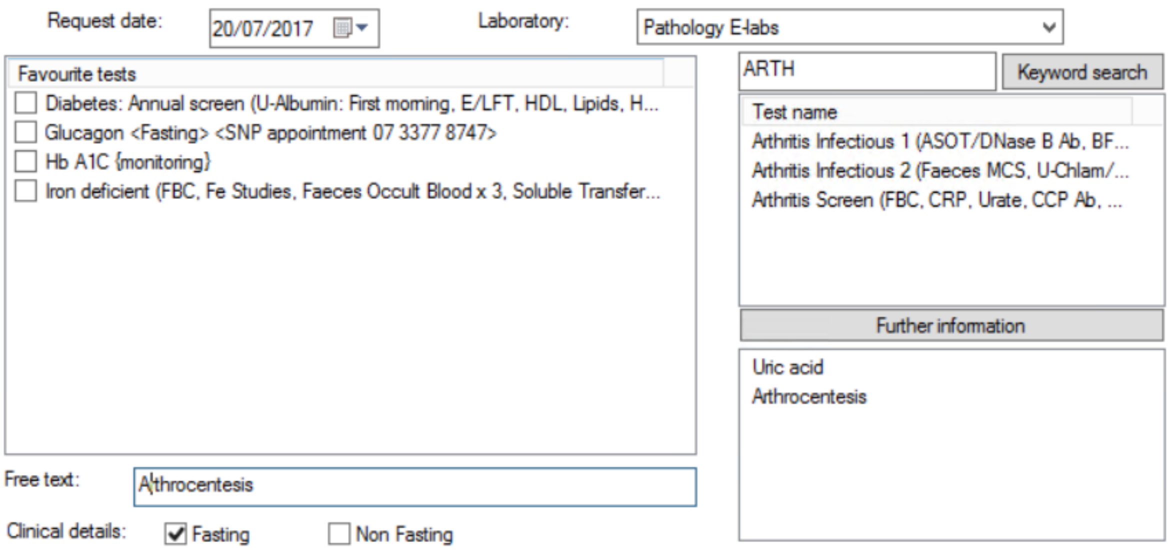
Search tests to add

5. Start typing the name of the test you want to order in the search field above the **Test name** list. The list will be populated with tests that start with the same letters.
6. To use the entered text as a general search term (which searches inside test names), click **Keyword search**.
7. Double-click a test in the **Test name** list to move it to the list below. Click **Further information** to open up an information screen about the test.



Add free-text request

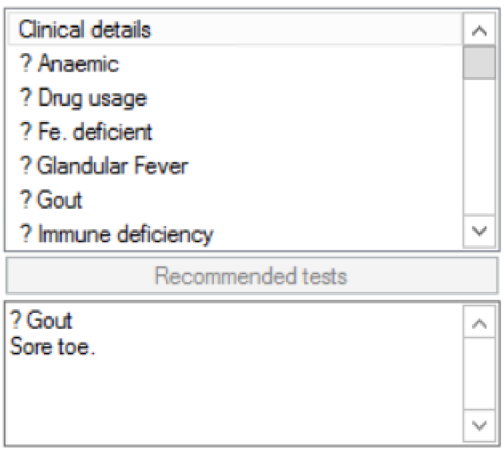
If you cannot find a test through searching, you can enter a test name as **Free text**. The free text will be added to the list of tests.



NOTE Defined tests are always preferable to entering free text.

Add clinical details

8. Double-click a clinical context in the **Clinical details** list to move it to the list below.
9. If you have imported recommended tests, the **Recommended tests** button will be enabled. Select a clinical context and click **Recommended tests** to view recommended tests for that context.
10. You can also type free text clinical details into the text box.



11. Tick if any of the requested tests requires **Fasting**, or if all tests are **Non Fasting**.
12. Tick **Pregnant** if the patient is pregnant, and enter the **LMP** and **EDC** if known.

13. If requesting cervical cytology, add any **Site** and **Appearance** details and whether to **Send to Register**.

Finalise and send the request

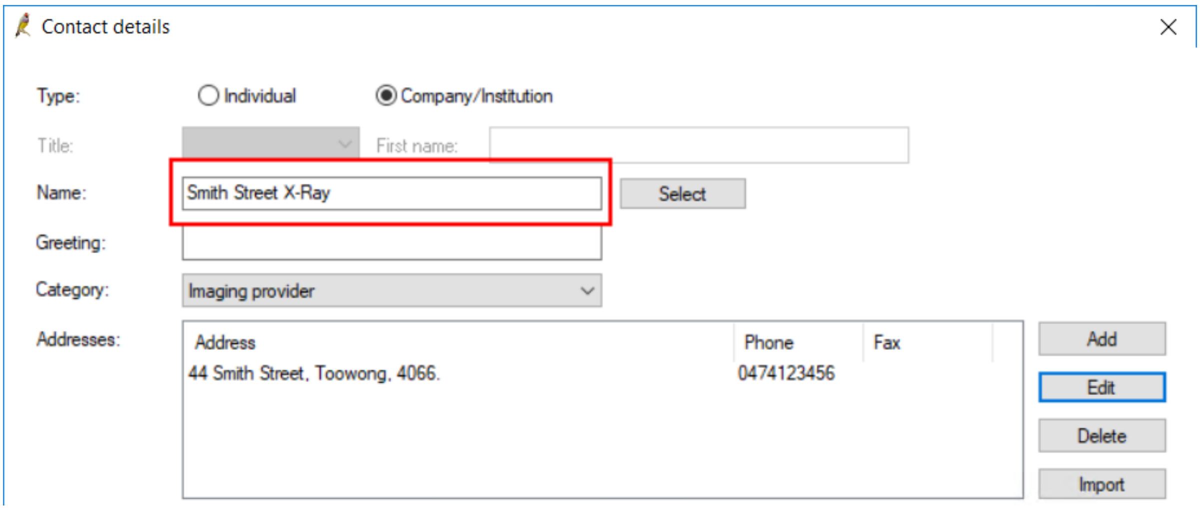
14. Change the **Billing** type from the default if required.
15. Tick **Add an entry to the actions database** to automatically create a Bp Premier action to follow up the test.
16. Tick **Do not send to My Health Record** if the patient does not want the imaging or pathology result uploaded to their My Health Record.
17. Click **Print and Send** to print the pathology form for the patient and store the HL7 request file in the export folder.

The messaging software will pick up the request from the export folder at the next scheduled export and forward the request to the laboratory.

Set up e-ordering for radiology

You must add the laboratory as a contact in Bp Premier and enable e-ordering.

1. From the Bp Premier main screen, select **View** > **Contacts**. The **Contacts** screen will appear.
2. Click **Add new**. The **Contact details** screen will appear.
3. Select **Company/Institution** and select a **Category** of 'Imaging provider'.
4. When you enter the company **Name**, make sure that the text in **Name** matches the name of the supplied imaging provider exactly.



Bp Premier will look up the imaging provider name in the database and name the outgoing HL7 file correctly.

5. Complete the rest of the contact and identity details.
6. Click **Set up E-ordering**. The **Setup electronic ordering** screen will appear.
7. Tick **Send electronic orders to this provider**.

8. Enter the path on this machine to store electronic requests. The laboratory can tell you if e-order files need to be in a specific folder.

   If the nominated folder does not exist, Bp Premier will not create the folder, but will place e-order files in a default system folder when the request is generated.

9. Click **Save** and click **Save** again to save the Contact record.

You can now send e-orders to this laboratory.

Submit a radiology e-order

Submitting a radiology e-order is the same as submitting a regular radiology investigation.

The only difference is that the **Print** button in the lower right becomes **Print & Send** if e-ordering is enabled for the selected laboratory. When **Print & Send** is clicked, the messaging software will pick up the request from the export folder at the next scheduled export and forward the request to the laboratory.

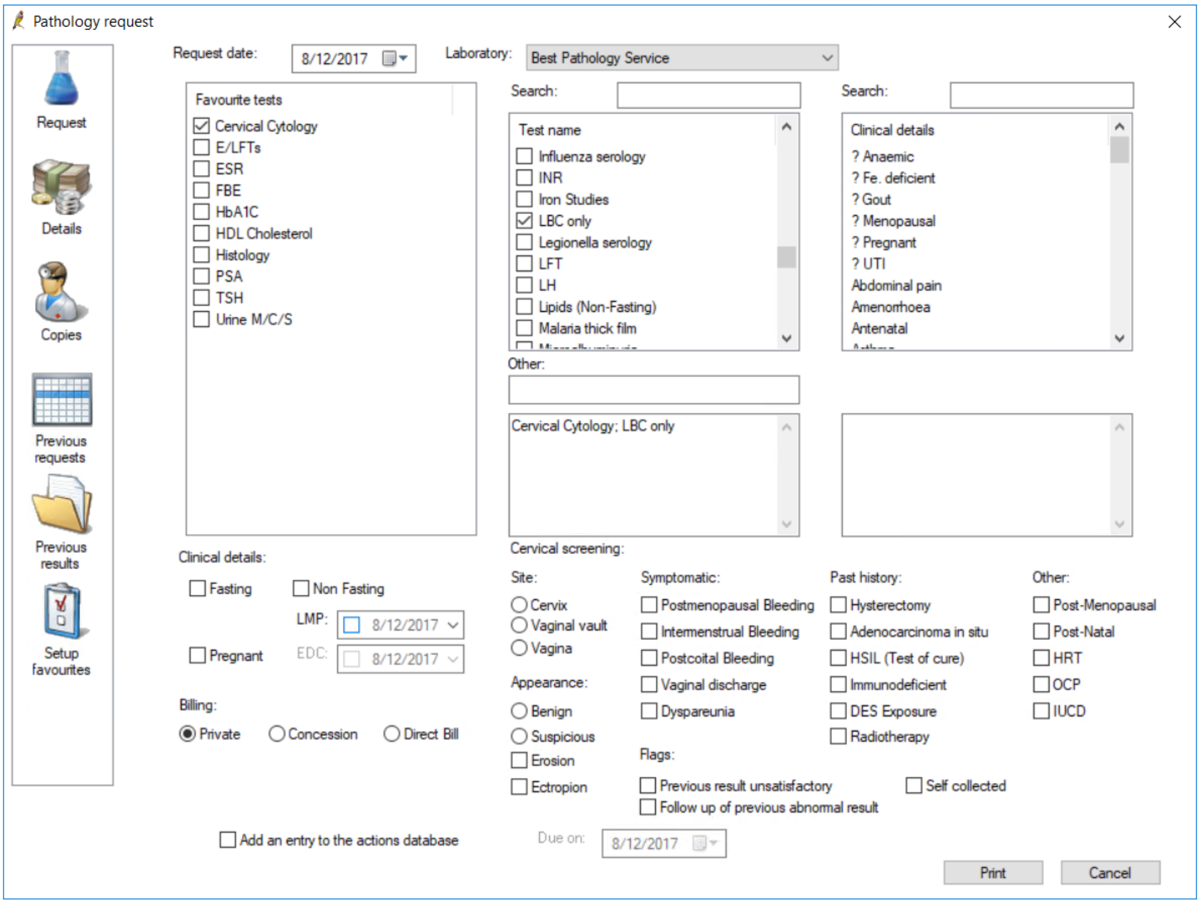
Request pathology or radiology

Pathology and radiology **investigation requests** are made from the patient record.

Providers can also set up custom tests, custom test reasons, and a list of top ten favourite tests. Pathology tests can be grouped and assigned to a single favourite.

Request pathology

1. From the patient record, select **Request** > **Pathology**. The **Pathology request** screen will appear.



TIP If you have ordered a pathology test for this patient before and want to reorder the same test, select the **Previous requests** tab, select the test to copy, and click **Use again**. The **Request** fields will be automatically populated.

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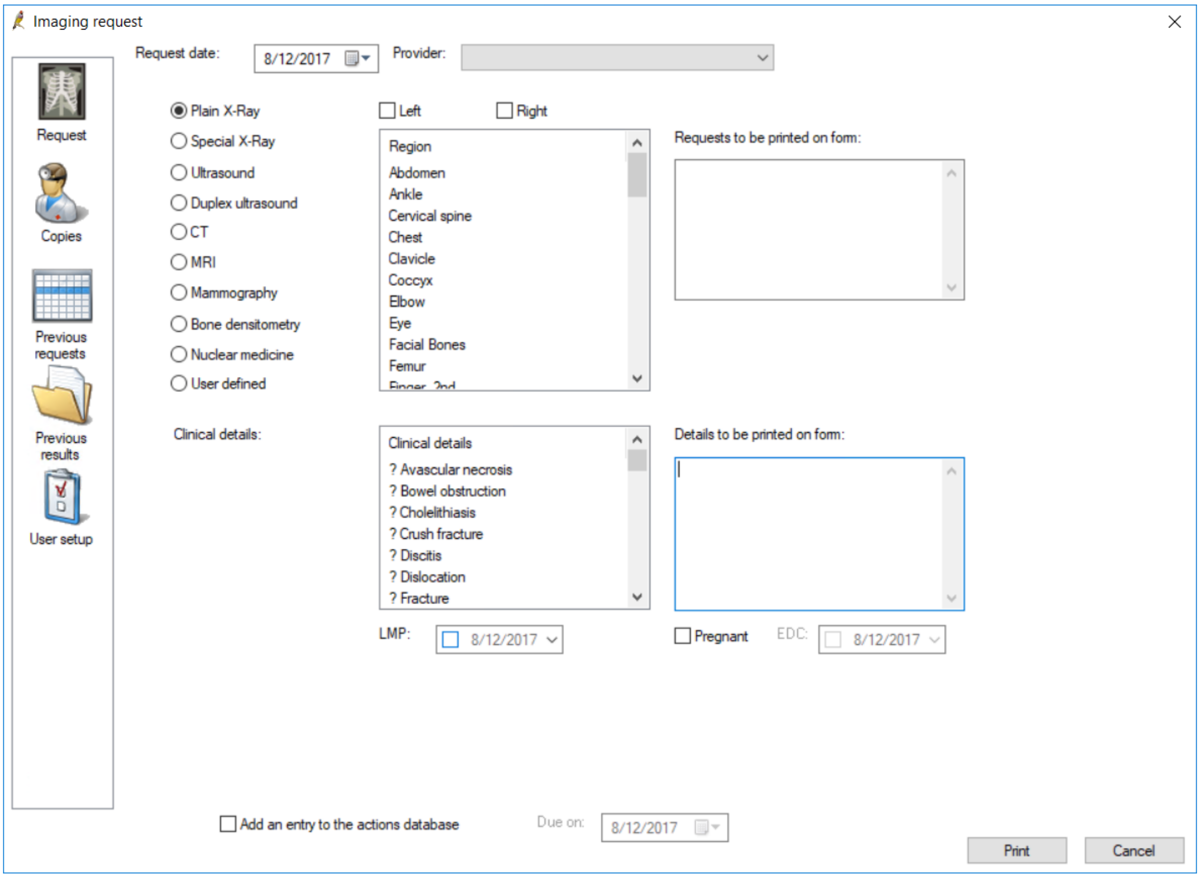
2. Select the **Laboratory** to conduct the test.
3. If the test you are requesting is in your **Favourites tests** list, select the test. Otherwise, enter text into the first **Search** field to search for tests in the **Test name** list.
4. You can also enter a test as free text in the **Other** field.
5. Search for conditions requiring the investigation in the **Clinical details** list. Double-click a condition to print on the form. Add as many conditions as required.
6. Complete the **Clinicial details** fields at the bottom of the screen.

   If the pathology request is a cervical screen, complete the **Cervical screening** fields.

7. Change the **Billing** type from the default, if necessary.
8. Tick **Add an entry to the actions database** to generate a staff Action for this request.
9. If the request is urgent, select the **Details** tab, tick **Urgent**, and enter the date the report is required in the **By** field.
10. If you need to send copies of the request, select the **Copies** tab. Select a **category** to display contacts and account holders in that category, and double-click an entry to add to the **Send copies to** list.
11. Click **Other** to manually enter copied-in parties.
12. The **Previous requests** and **Previous results** tabs show the patient's previous investigation requests and results.
13. If you are satisfied the request is correct, click **Print** to print the pathology request form on the selected laboratory's format to hand to the patient.

Request radiology

1. From the patient record, select **Request** > **Imaging**. The **Imaging request** screen will appear.



TIP If you have ordered a radiology test for this patient before and want to reorder the same test, select the **Previous requests** tab, select the test to copy, and click **Use again**. The **Request** fields will be automatically populated.

2. Select the **Provider** to conduct the test.
3. Select the imaging type from the list of radio buttons.
4. If the type is not listed, you will have to create a user-defined custom test. Select the **User defined** radio button to see the list of custom tests.
5. Double-click in the **Clinical details** list to add conditions requiring imaging investigation to be printed on the request form. Add as many conditions as required.
6. Tick **Add an entry to the actions database** to generate a staff Action for this request.
7. If you need to send copies of the request, select the **Copies** tab. Select a **category** to display contacts and account holders in that category, and double-click an entry to add to the **Send copies to** list.

8. Click **Other** to manually enter copied-in parties.
9. The **Previous requests** and **Previous results** tabs show the patient's previous investigation requests and results.
10. If you are satisfied the request is correct, click **Print** to print the pathology request form on the selected laboratory's format to hand to the patient.

Create a custom test

If a test is not listed with the default imaging or pathology tests that ship with Bp Premier, you can create a custom test that will be printed on the request form.

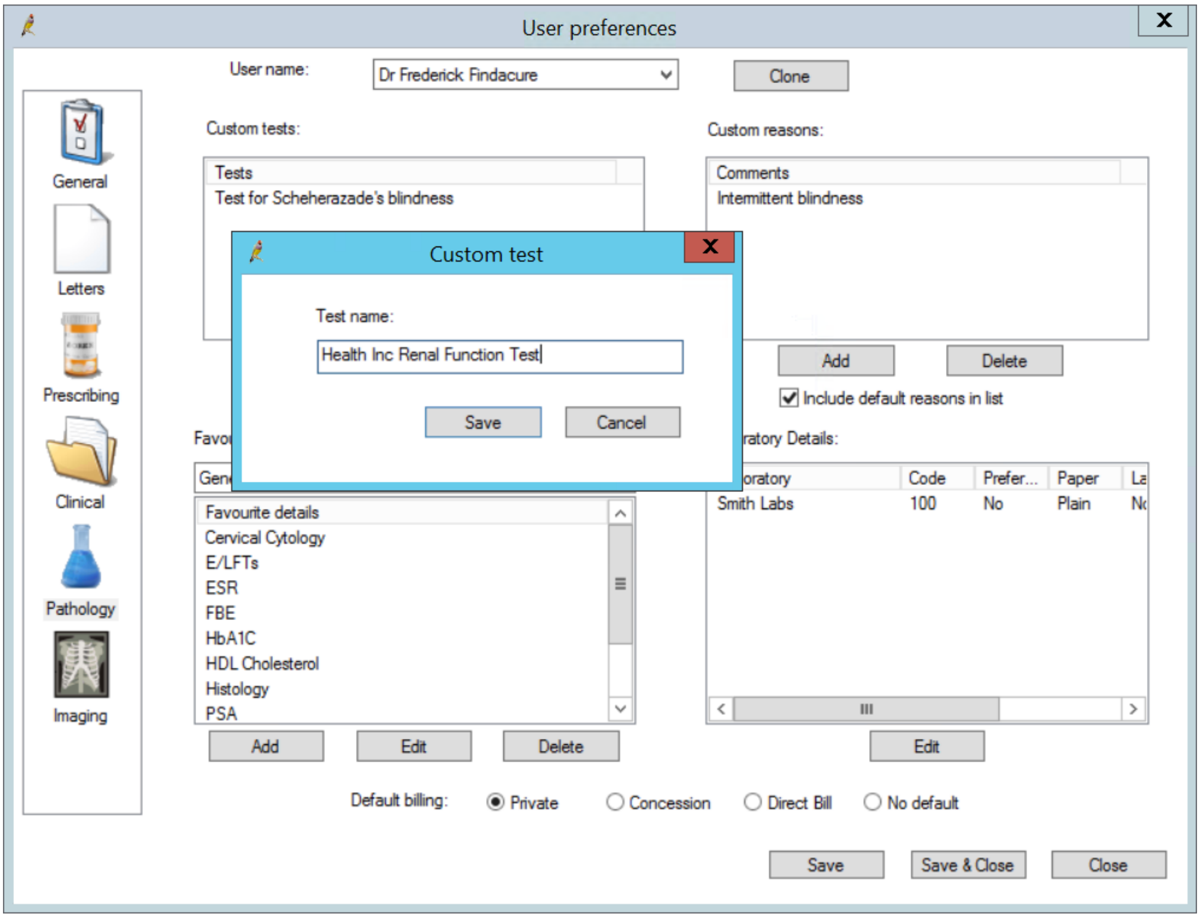
The following procedure describes how to create a custom pathology test, but the process is the same for custom radiology tests. To view custom radiology tests from the **Radiology request** screen, select the **User defined** radio button.

1. From the patient record, select **Request** > **Pathology**. The **Pathology request** screen will appear. Select the **Setup favourites** tab.

   or

   From the main screen, select **Setup** > **Preferences** and select the **Pathology** tab.

2. Under the **Custom tests** list, click **Add**. The **Custom test** screen appears.



3. Enter the name of the custom test and click **Save**. The test will be added to the **Custom tests** list and be selectable as a pathology investigation.

Create a custom test reason

If a condition is not listed with the default clinical details on the **Request** screens, you can create a custom test reason that will be printed on the request form.

The following procedure describes how to create a custom pathology test reason, but the process is the same for radiology.

1. From the patient record, select **Request** > **Pathology**. The **Pathology request** screen will appear. Select the **Setup favourites** tab.

   or

   From the main screen, select **Setup** > **Preferences** and select the **Pathology** tab.

2. Under the **Custom reasons** list, click **Add**. The **Add comment** screen appears.

3. Enter the name of the custom reason and click **Save**. The test will be added to the **Custom reasons** list and be selectable as a condition from the **Clinical details** list.

Create a list of pathology favourites

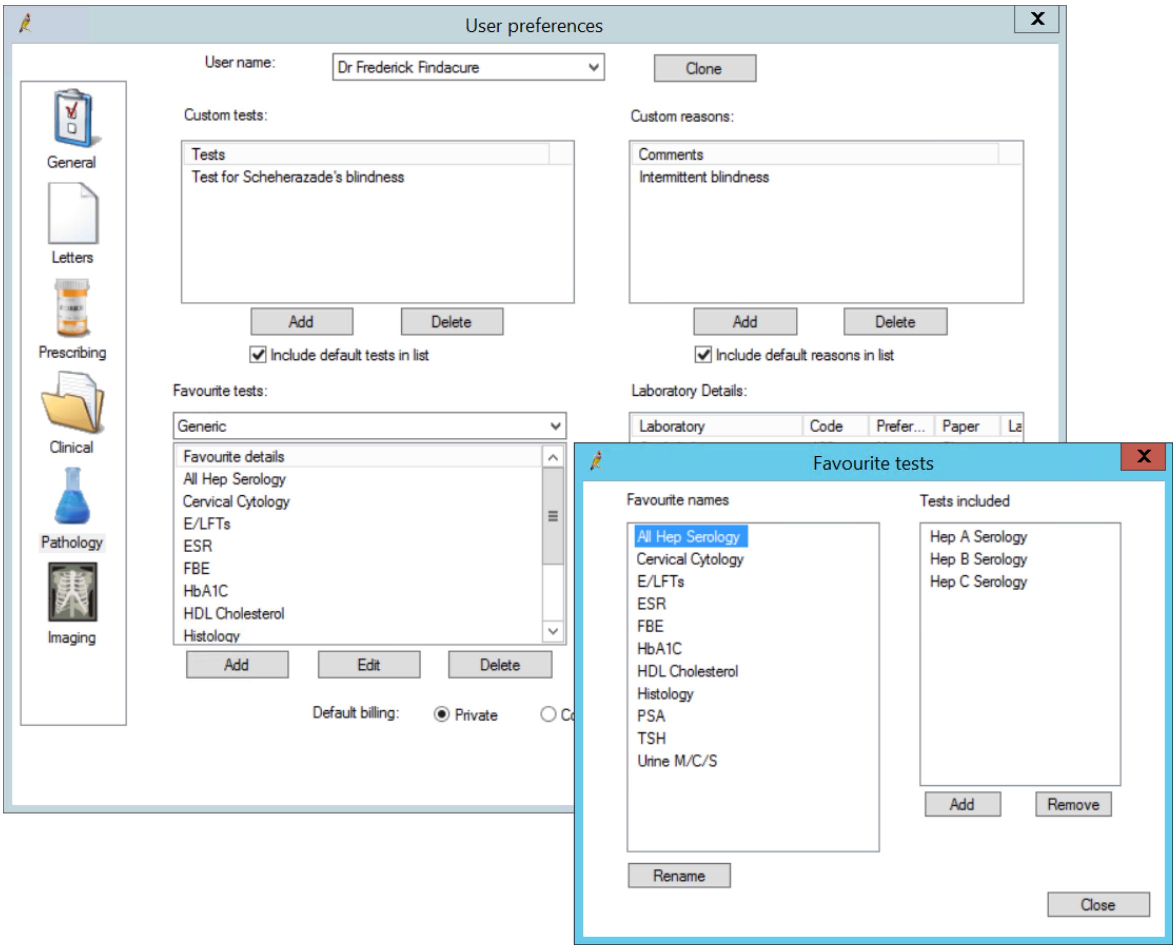
You can nominate a single test as a favourite, or a group of related tests.

1. From the patient record, select **Request** > **Pathology**. The **Pathology request** screen will appear. Select the **Setup favourites** tab.

   or

   From the main screen, select **Setup** > **Preferences** and select the **Pathology** tab.

2. Under the **Favourite tests** list, click **Add**. The **Favourite test** screen appears.



3. Click **Add** to add a test to the **Tests included** list. Add as many tests as you need to create a group.
4. Enter a **Favourite name** or click **Use test name** and click **Save**. The test or group of tests will be added to the **Favourite tests** list.

Cervical screening

Cervical screening investigations are requested from the patient record like other pathology investigation requests.

However, cervical screening results must be manually added to the **Cervical screening** section of the patient record, rather than being allocated from the **Investigation reports** screen and actioned from the provider **Inbox**. Cervical screening requests are still listed in the **Investigation requests** screen.

Staff who are not doctors, such as nurses, can also add results and reminders outside of the patient record from the **Clinical** > **Cervical Screening**screen.

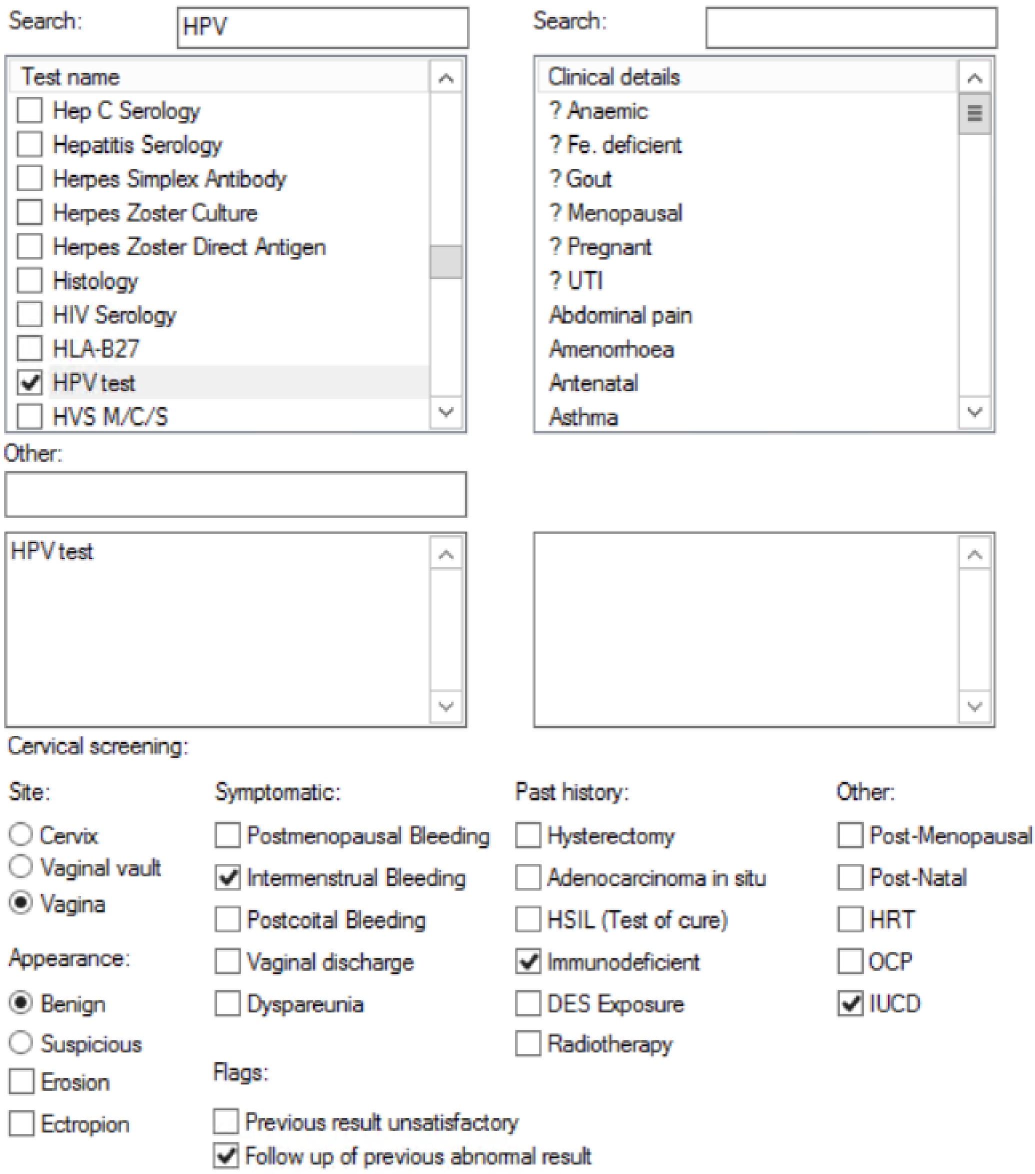
Request a cervical screening investigation

Guidelines for completing a pathology request under the new National Cervical Screening Program can be found on their website **for Healthcare providers**.

1. From the patient record, select **Request** > **Pathology**. The **Pathology request** screen will appear.
2. Select one of the cervical screening tests from the **Test name** list:
   - Cervical Screening test
   - Co-test (HPV&LBV)
   - LBC only
   - HPV test

NOTE Other cervical screening tests may be added through regular data updates.

Or select from **Favourite tests** if you have added a test to your favourites. The fields in the **Cervical cytology** section in the bottom right will be enabled.



3. Select any **Cervical screening** additional clinical information fields that apply to the patient.

IMPORTANT If you are requesting pathology outside of a patient's regular cervical screening schedule (for example, as part of treatment followup), you must supply additional clinical information to indicate this, or the patient may have bear the cost of the test.

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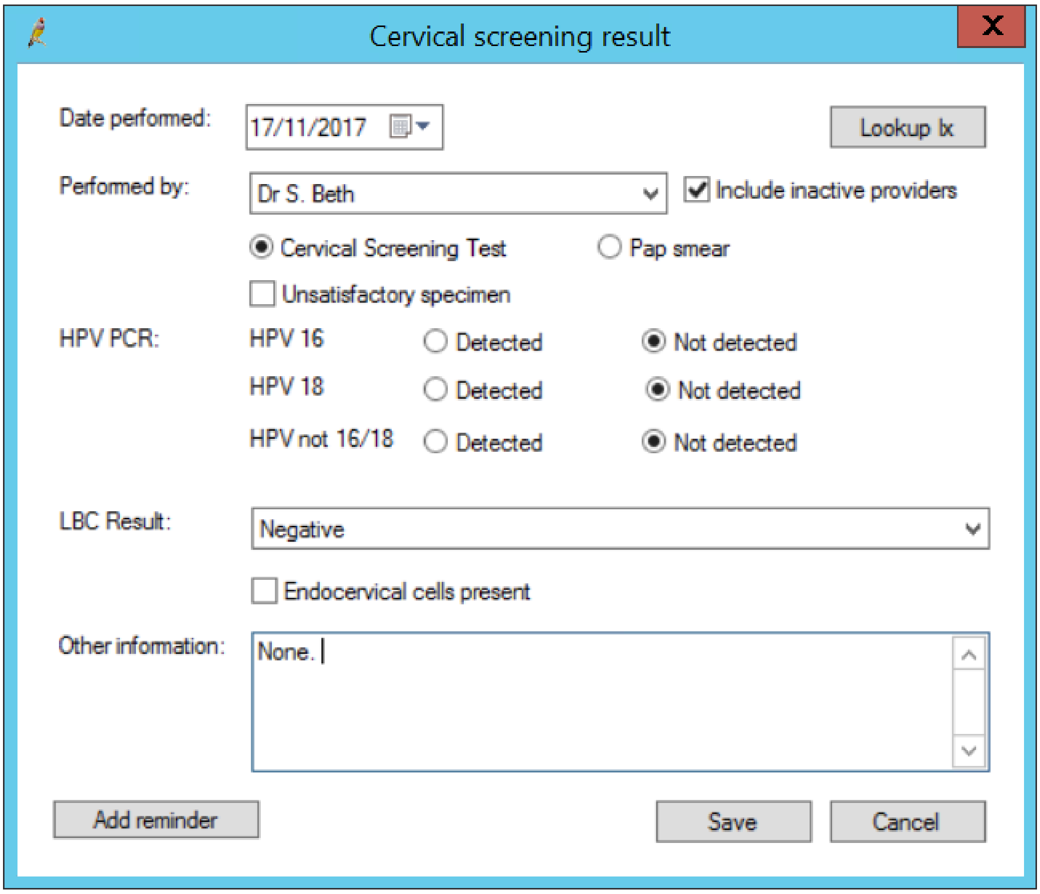
4. Complete the rest of the screen as for any pathology request.
5. Click **Print** to print the request for the patient.

Add a cervical screening result to the patient record

1. From the patient record, select the **Cervical screening** section from the left hand tree.
2. Click **Add**. The **Cervical screening result** screen appears. You can record results for both the older pap smear test and cervical screening tests from this screen.



3. Leave **Cervical Screening Test** selected.

IMPORTANT The **Pap smear** option is for legacy purposes and should never need to be selected after your upgrade to Jade.

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4. Select the options that apply to the test result:
   - HPV CR
   - LBC Result
   - Endocervical cells present

5. Select the provider who requested the test from the **Performed by** field, or select 'Not performed here' if the test was conducted elsewhere.
6. Free-type any **Other information**.
7. Click **Add reminder** to add a followup appointment reminder for the patient.
8. Click **Save** to save the results to the **Cervical screening** page.

Add a cervical screen reminder to patient

The 'Cervical screening' reminder reason can be assigned to female patients who take part in regular cervical screening.

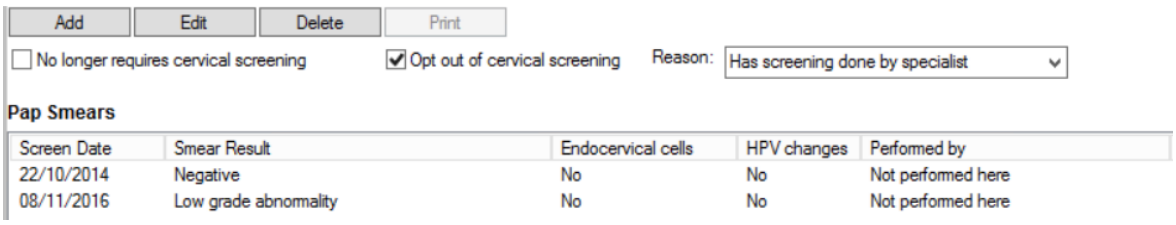
1. From the patient record, click **Reminders** in the top right. The **Reminders** screen will appear.
2. Click **New**. The **Reminder** screen will appear.
3. Select 'Cervical screening' from the **Reminder reason** list. The date fields on the right hand side will be populated with the default values for the pap smear reminder.
4. Tick **Automatically update this reminder when sent to patient**.
5. Click **Save**. The reminder will be added to the patient record.

Opt a patient out of cervical screening

Cervical screening notifications appear in the preventive health **Notifications** list for a patient, and are enabled from the **Cervical screening** section of the patient record.

A patient may choose to opt out of cervical screening at your practice. For example, the patient may have reached the established exit age for the cervical screening program, have their cervical screening conducted elsewhere by a specialist, or opt out for personal reasons.

1. From the patient record, select **Cervical screening** from the left hand tree.

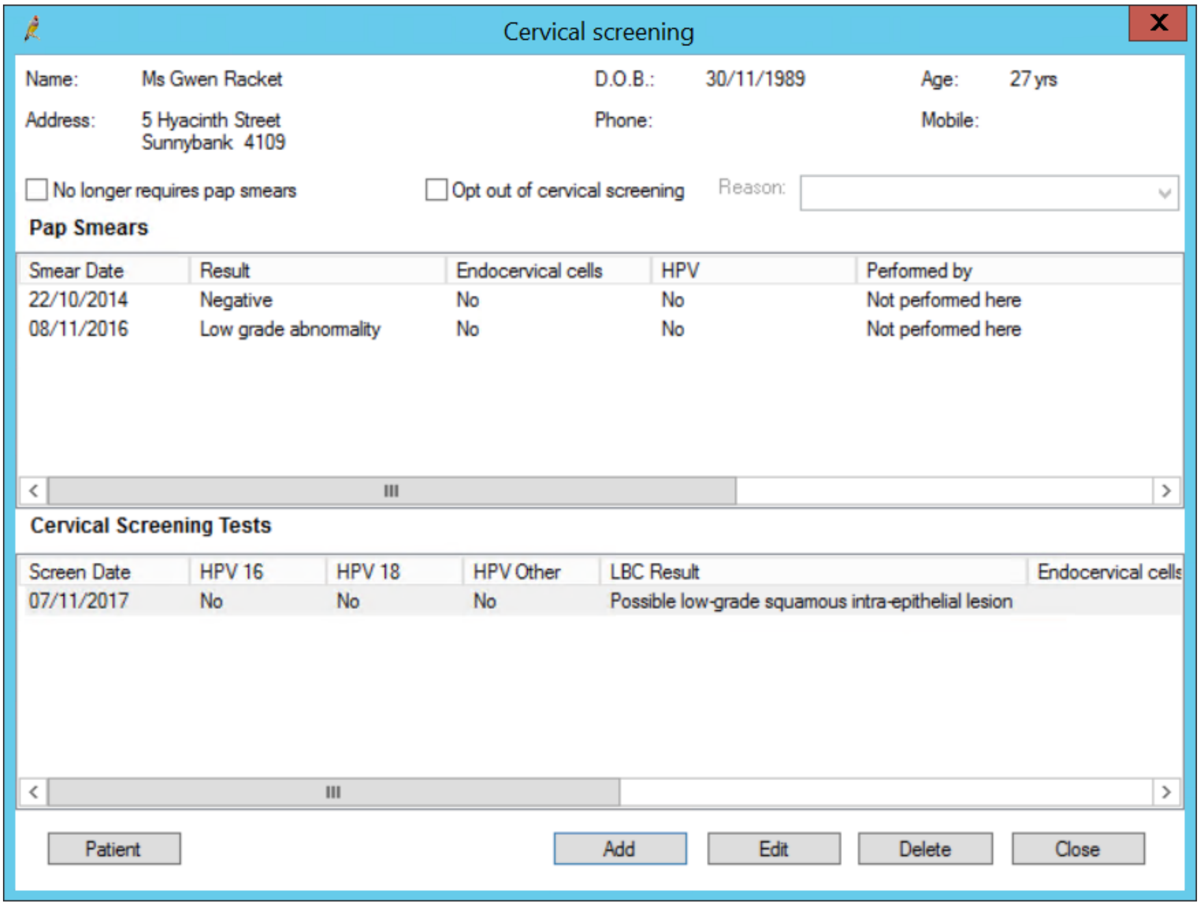


2. Tick **No longer requires cervical screening** if regular cervical screening no longer applies to this patient. Reminders will no long show in the **Notifications** list.
3. If the patient is still eligible but is opting out of cervical screening at your practice, tick **Opt out of cervical screening** and select a **Reason**. You can also enter a free-text reason if the default reasons do not apply.

Practice staff who do not have access to the patient record can also record a patient's opt-out. Select **Clinical** > **Cervical Screening** from the main screen, select a patient, and record the opt-out in the **Cervical screening** screen.

Manage cervical smear results outside of the patient record

1. From the main screen, select **Clinical** > **Cervical Screening**. The **Select patient** screen will appear.
2. Search for and select a patient and click **Select**. The **Cervical screening** screen will appear.



3. Click **Add** to add test results. See **Add a cervical screening result to the patient record on page 39** for more information.
4. Click **Patient** to search for another patient.

View results in the Provider Inbox

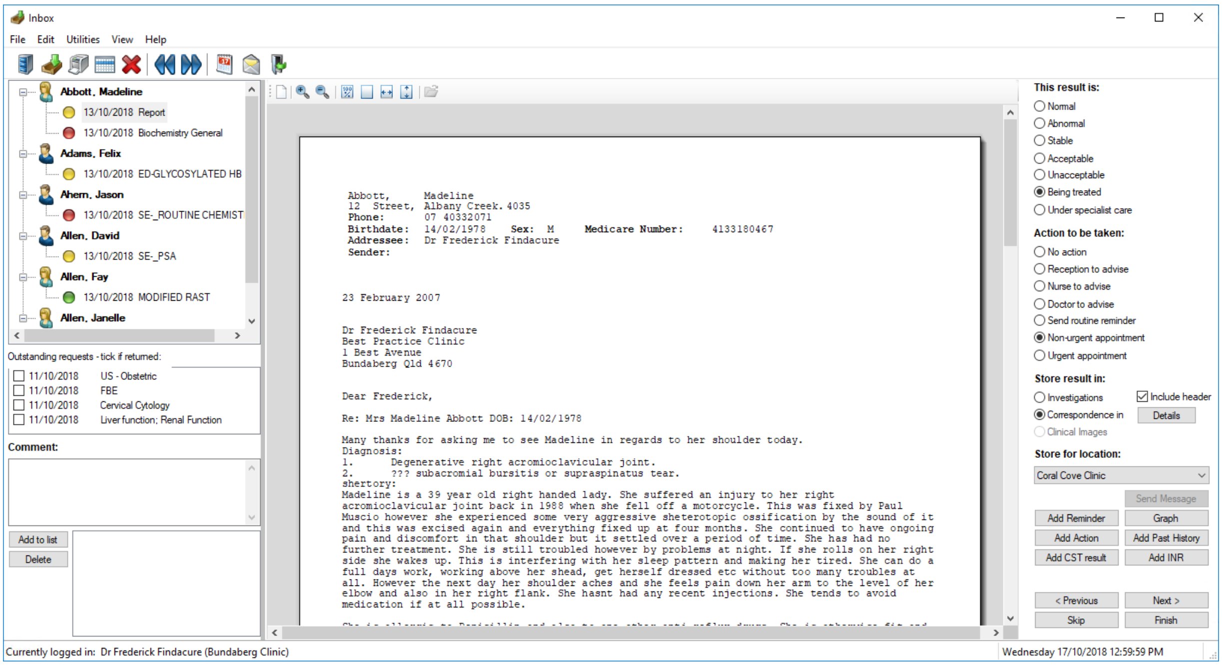
Use the Provider Inbox to allocate and action returned investigation results.

What do I use the Provider Inbox for?

Each provider has their own Inbox linked to their login. The Inbox is used to:

1. check investigation reports that have been downloaded from a pathology or radiology laboratory
2. action the result
3. save the results to the patient's file.

To access the Inbox, select **View** > **Inbox** from the main menu or press **F3**. The tree view on the left of the screen displays results by patient name. Click on the + sign to open all results for a patient. Select a result to see the details in the middle section.



At the 'Inbox' stage, the report has not yet been added to any patient record. You must action the investigation result from this screen to save the result to the correct location in the patient record and move the report to the Followup Inbox.

From the Inbox, you can also:

- Move a report to a different doctor
- View another doctor's results
- View a graph from atomised results that include the patient's existing observation data

- Insert details into the patient record, such as adding a smear result or INR data
- View a patient's related appointments
- Create Bp Premier Reminders and Actions to assist following up a result
- Mark outstanding requests as returned.
- Send an SMS message to a patient regarding their results.

Which results does the Inbox show?

The Inbox shows results that meet all of the following:

- The result has not been actioned
- The result has been assigned to a doctor
- The result has been allocated to a patient (default behaviour).

This includes results from the following sources:

- imported automatically by Bp Service
- imported and scanned in from the Bulk Document Import utility

Results from Bp Service

When results are imported automatically via Bp Service, the result file is read and Bp Premier attempts to match the result to a patient record by name and DOB. Sometimes, a match cannot be found. In this case, the result must be manually allocated from the **Incoming Reports** screen.

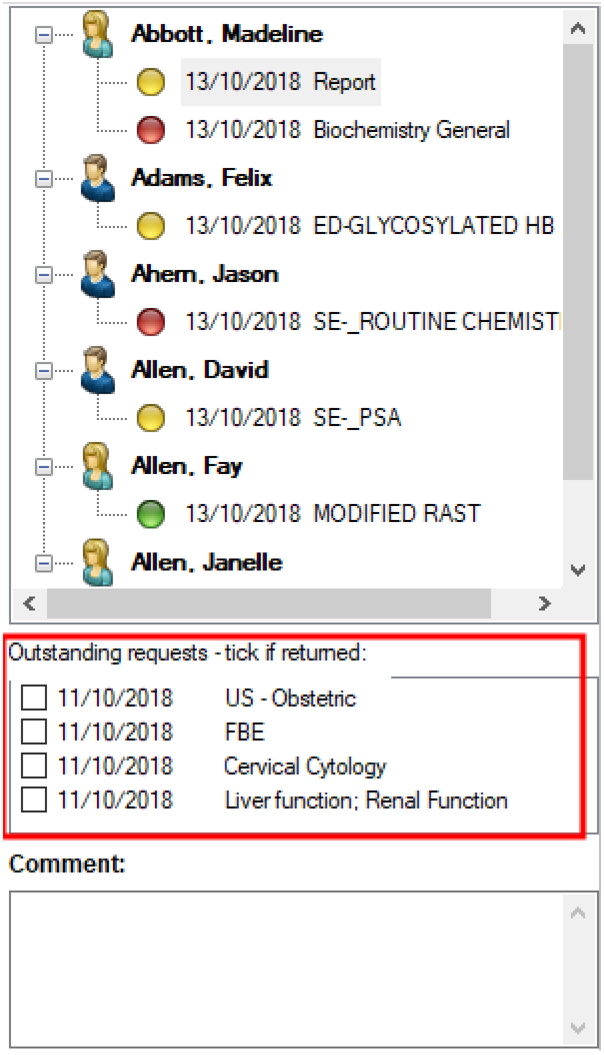
By default, the Inbox will not show results have not yet been allocated to a patient. You can change this behaviour by turning off the **Don't allow unallocated reports into Inbox** option in **Setup** > **Configuration** > **Results Import**. If this setting is not ticked, unallocated reports will appear in a provider's Inbox. See **Set up results importing on page 14** for more information.

Results from Bulk Document Import

From the Bulk Document Import utility, you can scan in documents and assign them to a doctor, but you are not required to assign scanned documents to a patient. BDI documents that were not allocated to a patient during scanning must be allocated to a patient from the **Incoming Reports** screen before the document will appear in the provider's Inbox.

Action investigation results from the Inbox

1. Select **View** > **Inbox** from the main menu or press **F3**.
2. Select the result you want to action from the list on the left.
3. If the result is for an request that has not been marked as returned, tick the corresponding request in the **Outstanding requests - tick if returned** list.



4. Enter a **Comment** and click **Add to list** to add any comments about a result. For example, a comment might contain relevant information for another provider tasked with following up the result.
5. Action the request by selecting from the following radio button sections from the right:
   - **This result is** — Clinical evaluation of result.
   - **Action to be taken** — Followup action. All actions except for 'No action' will add the result to the **Followup Inbox** for later actioning by the practice.
   - **Store result in** — Where in the patient's record to store the result.
   - **Include header** — Tick to store the report header with the result.
   - **Store for Location** — Practice location to store result for.
6. Click a button to perform additional actions for the selected result and patient:

Button	Description
Details	Supplies additional details about the result to save to the patient record.
Send message	Sends an SMS message to the patient about actioned results.
Add Reminder	Opens the **Reminders** screen to view or create reminders for the patient.
Add Past History	Insert a past history item into the patient's record.
Add INR	Opens the patient's INR Manager to record INR management details.
Graph	View and graph atomised results. See **View a graph from a result below** for more information.
Add Action	Create an Action for the patient.
Add CST Result	Record a cervical screen result t in the patient's record.

7. Click **Finish** to complete actioning the result and close the screen, or **Next** to move on to the next result. The result will be saved in the patient's file and will be visible on the **Clinical** > **Followup Inbox** screen (unless 'No action' is to be taken). If you click **Skip**, the next inbox item will be displayed without saving changes.

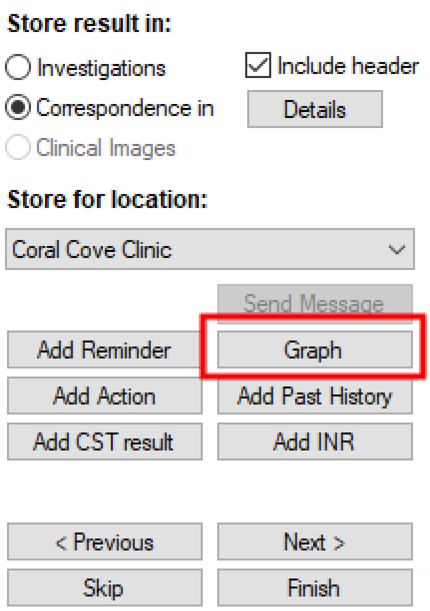
To delete a report, select **Edit** > **Delete** from the menu. Bp Premier will prompt for confirmation.

View a graph from a result

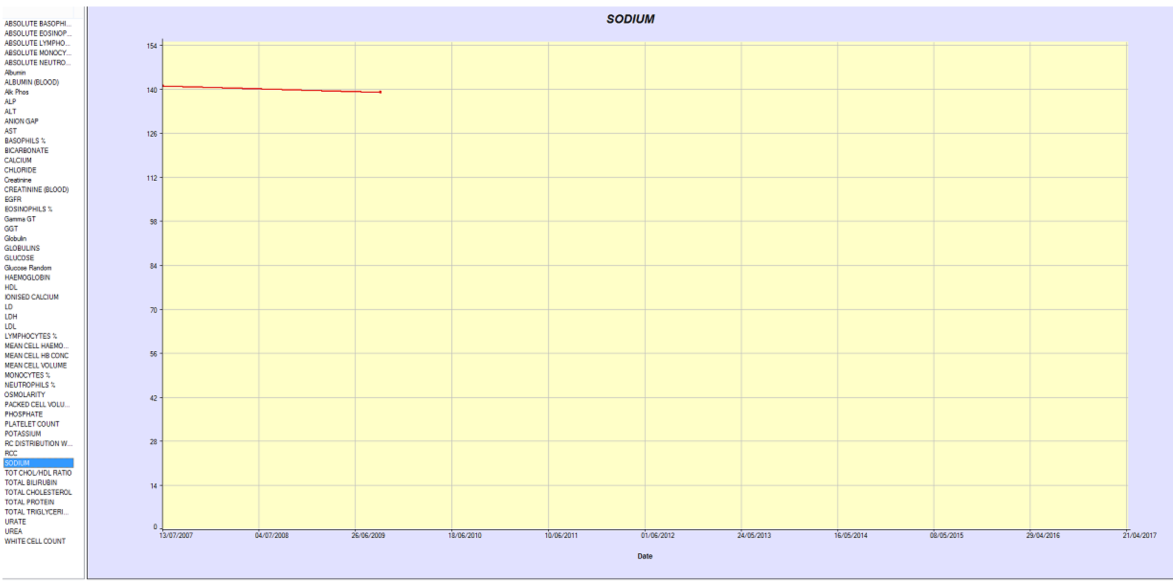
Bp Premier can provide graphs of incoming results of atomised data. If the patient has existing atomised observation data recorded, the graph will include that data, and any other results data of that type also in the inbox.

This allows providers to view historical trends without needing to open the patient record, and provides more information to determine if a patient recall is required.

1. From the Inbox, select the result you want to graph from the list of incoming reports on the left.
2. Click **Graph** from the set of buttons at the bottom of the Inbox. This button will be enabled if Bp Premier can calculate atomisable data from the results.



3. The **Atomised result values** screen will appear.
4. Select **View** > **Graph** from the menu or click the **Graph** icon. The graph of results will appear.



5. Select a property to view from the left hand side to view the graph for that property. Close the screen to exit the graph.

View another doctor's Inbox

Providers can view each other's Inbox screens for results that have not been marked confidential. For example, a provider who goes on leave may ask another provider to review their Inbox to ensure urgent issues are addressed.

1. Select **File** > **Change Inbox** from the menu, or click the **Change Inbox** icon. The **Select doctor** screen will appear. This screen only lists providers who have results allocated to them.
2. Select a provider and click **Select**.
3. The Inbox will load the outstanding results for the new provider.

Move a report to another doctor

1. Select **Edit** > **Move report**. The **Select doctor** screen will appear.
2. Select the provider to move the report to and click **Select**. The unactioned result will be moved to the selected provider's Inbox.

Book a recall appointment

1. Select **File** > **Patient appointments** or click the **Patient appointments** icon. The **Patient appointments** screen will appear, showing future appointments for the patient.
2. Tick **Include past appointments** to view historical appointments.
3. Click **New** to create a Recall (or ‘review’) appointment for the patient.

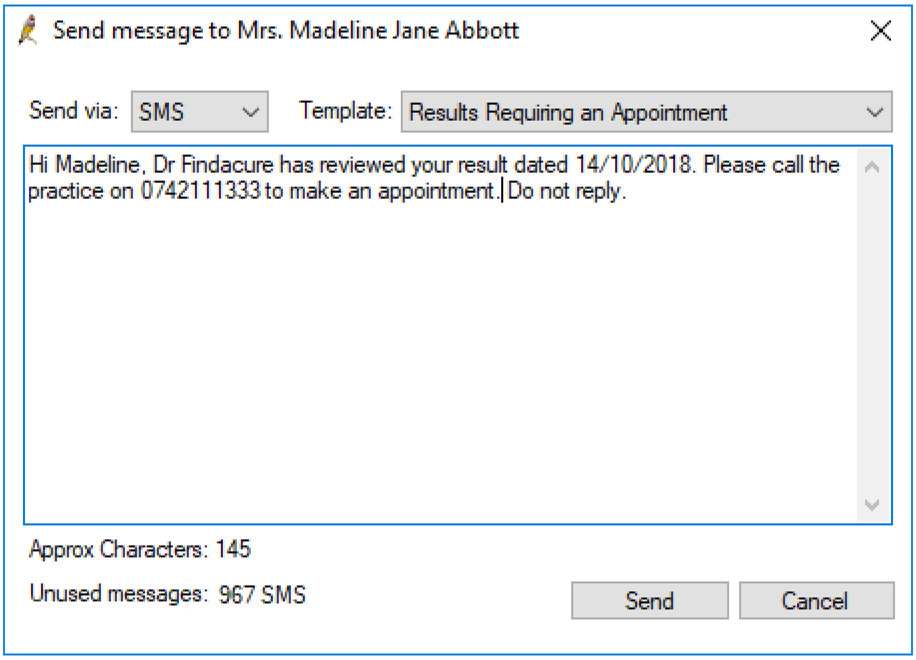
Send a Bp Comms message to a patient

You can send a 'clinical communication' message by SMS or BHA to a patient about their results from the provider inbox. You must action a result before you can send a message about the result.

Before patients can receive clinical communications:

- The practice must enable clinical communications in Setup > Configuration > **Bp Comms**
- The patient must consent to receive clinical communications and enrol in SMS in their demographics > **Bp Comms Consent**.

1. From the Inbox, click **Send Message** from the bottom right, or click the envelope icon in the toolbar . The Send message window will appear.



2. Choose to either send via SMS or App.
3. Change the clinical communication **Template** to use from the default if you need to.
4. Edit the message text and click **Send**.

NOTE Sending a message from the Inbox does not mark the result as contacted.

The message will be sent via the chosen communication method. A clinical communication contact note will also be created against the patient.

Contact patients from the Follow up Inbox

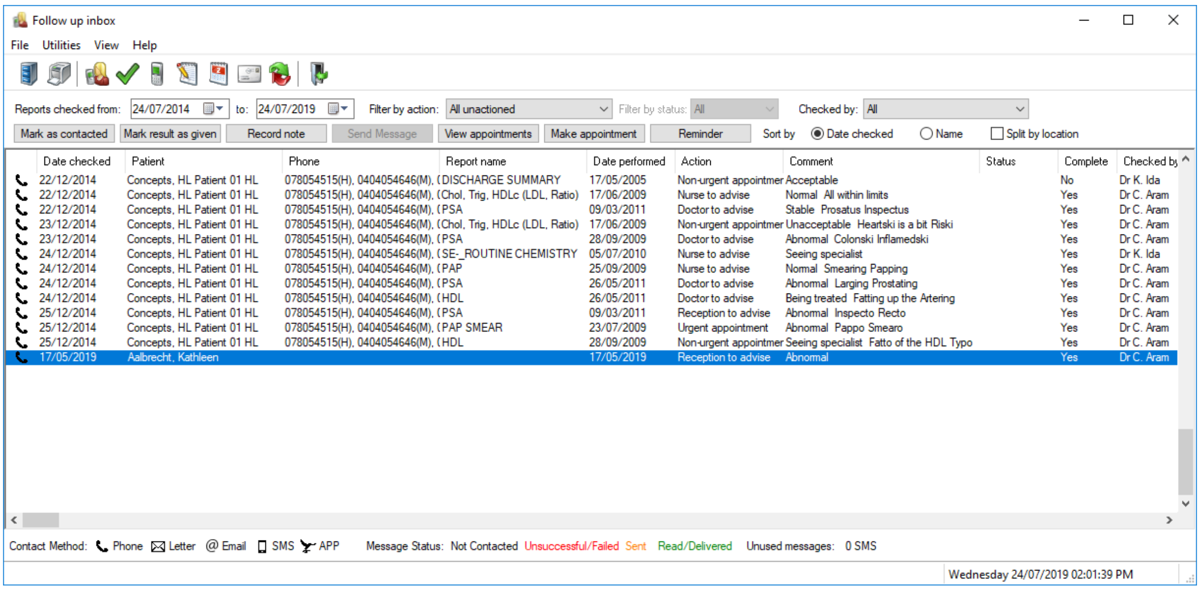
The **Follow up Inbox** manages patients who need to be contacted about returned results, and is used to book recall appointments for patients with clinically significant results.

From the **Follow up Inbox** screen, you can:

- Book appointments
- Mark patients as 'contacted' and results as 'given'.
- Record general notes
- Open a patient record
- Open patient demographics
- Add a reminder to a patient.
- Record a contact note.

By default, this screen displays results for the last 12 months where the patient has not been marked as contacted and where the result is marked as anything other than 'No action'.

1. From the Bp Premier main screen, select **Clinical** > **Follow up inbox**.



2. All reports and results that have been processed through the provider Inbox are displayed, including those saved to **Correspondence In**. You can filter the list by:
   - Date range (**Reports checked from** and **to**)
   - **Filter by action**
   - Provider (**Checked by**).
   - **Filter by status** (show only results that have been given, or where patients have been contacted)

For example, use the **Filter by action** field to show only results that the provider has marked for 'Urgent appointment'. If a practice nurse is performing a daily followup check, you could set this field to show only 'Nurse to advise' results.

3. Sort the list by **Date checked** or **Name**. To view results separated by practice location, select **Split by location**.
4. The leftmost column indicates the patient's preferred contact method. You can perform a Mail Merge to contact patients in bulk.

Phone Letter Email SMS APP

5. Mark results individually using the buttons along the top and the right-click menu:

Action	Description
Mark as contacted	Indicate that the patient has been contacted about the result. The result in the patient's file will be updated to indicate a status of 'Contacted' and the date.
Mark result as given	Indicate that the patient has been given the result. The result in the patient's file will have be updated to indicate a status of 'Given' and the date.
Record note	Record a follow up note for later about the results. Recorded notes can be viewed in the patient record under **Investigation Results**. Select the investigation result, right-click, and select **View notes**.
Make appointment (right-click)	Book a recall appointment for the patient.
View appointments (right-click)	View and book appointments for the patient.
Change action (right-click)	Edit the clinical evaluation (for example, 'Normal' to 'Abnormal') , action to be taken, comments, or practice location.

6. To view a summary of the result, double-click the result in the list. The **Details** screen will appear according to the type of communication.
7. Other actions from **Follow up inbox** include:

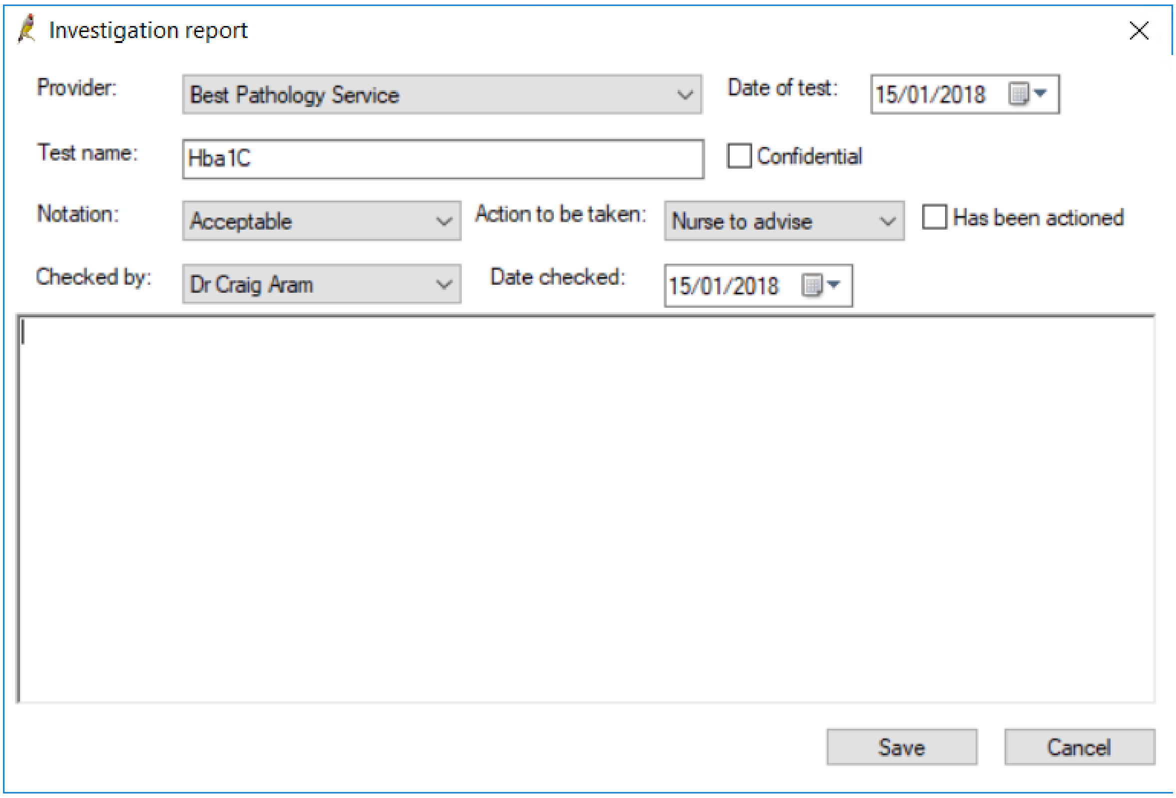
Action	Description
	Opens the patient record for the selected result.
	Opens the **Report action list** to print the list of results shown. When printing the report, you can indicate whether you want the results updated to indicate they have been 'Contacted' or 'Given'.
File > Mail Merge	Opens the **Report action list** to run a mail merge from the list of patients. You can filter the mail merge by provider, date, and action type, and mark the result as 'patient contacted' or 'given to patient' after the mail merge.
File > Unmark result	If you accidentally mark a result as 'Contacted' or 'Given', this option resets the status. If the result no longer shows on the screen, change the **Filter by action** field to 'All'.
Utilities	You can open the Messages screen or To Do List for the logged-in user.

Add an investigation report manually

If your practice has set up messaging and laboratories, investigation reports should proceed smoothly through the pathology workflow and be assigned to the patient record.

You can also add an investigation report manually to the patient record, for example, for investigations from a laboratory without secure messaging, or a lab in the same location as the practice.

1. From the patient record, select **Investigation reports** from the patient tree.
2. Click **Add**. The **Investigation report** screen appears.



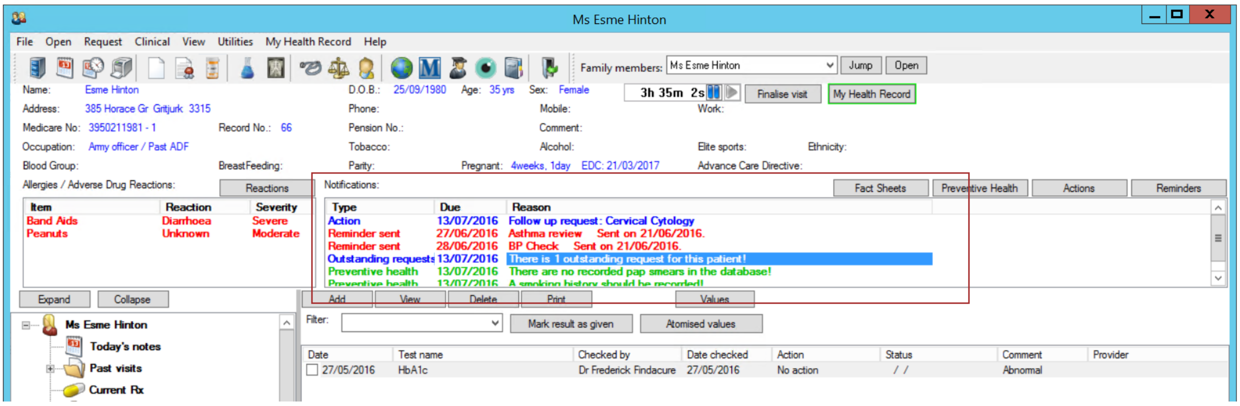
3. Complete the fields as if viewing the report from the provider Inbox.
4. Cut and paste or type the report text into the text box provided.
5. Click **Save**. The report will be added to the **Investigation reports** list in the patient tree and can be marked as given, moved to **Correspondence in**, and amended with followup notes.
6. To assign graphable values to the investigation record, click **Values** at the top of the list. Enter data from the investigation manually into the fields, depending on the test type, and click **Save**.

Clear outstanding requests

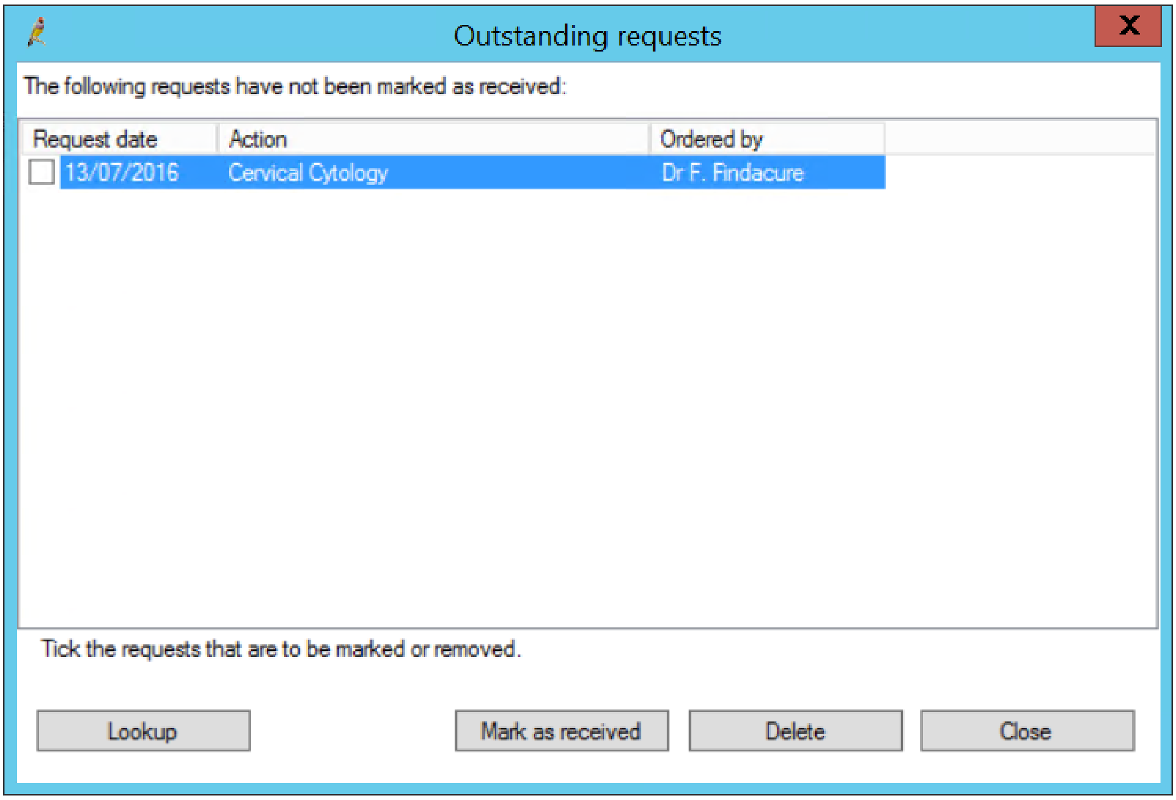
You can review and clear outstanding requests for a single patient from the patient record, or requests for the practice from the **Investigation requests** screen.

Clear requests for a patient

Within the patient record, outstanding requests are shown in the **Notifications** section.



1. Double-click an outstanding request to open the **Outstanding requests** screen. This screen displays a list of requests that have not been marked as received.



2. Select and click **Marked as received** for any request that has been received.
3. Click **Delete** to remove any requests that are no longer applicable.
4. Click **Lookup** to view request results, if any.

NOTE If you have converted from Medical Director, requests will probably not be marked as received, because of the source data import. You will need to remove existing outstanding requests from the list before you can manage this list within Bp Premier.

Clear requests for the practice

The **Investigation requests** screen shows the list of investigation requests that have been ordered through Best Practice. To best manage outstanding requests from this screen, incoming results should be set up to indicate by the surgery if the result has been returned.

1. From the main menu, select **View** > **Investigation requests**. The **Investigation requests** screen will be displayed.
2. Filter requests **By doctor**, and set a date range using the **Requested on or after** and **Requested on or before** date pickers.
3. Tick **Include already returned** to include already returned requests.

Outstanding requests are displayed by default with a coloured background.

4. Mark a request as returned by selecting the request and clicking the icon. Returned requests are displayed with a green background.
5. Delete a request by selecting the request and clicking the icon, or pressing the **Delete** key.

NOTE Due to interpretation of the electronic request standards, laboratories use the 'Complete' flag in different ways. Generally, the Complete flag indicates complete per result and **not** per request.

Press Ctrl+Shift+End to select every record on screen, if you need to manage requests in bulk.