Bp Premier Guide to Linking to PracSoft

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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.

Link to PracSoft

A practice can use Bp Premier for recording clinical data only and use the PracSoft billing package for the appointment book, billing, and other management functionality. This approach maintains your patient demographics in the billing package but synchronises changes with Bp Premier.

Bp Premier supports linking to PracSoft 3 and higher.

You can link to PracSoft in two ways:

- One-way linking — Transfers demographic data from PracSoft to Bp Premier only
- Two-way linking — Transfers demographic data from PracSoft to Bp Premier and from Bp Premier to PracSoft. Two-way linking also allows transfer of visit item codes and immunisation data.

You can transfer different types of information based on the linking type:

One-way	Two-way	Data transferred	File name used
✔	✔	Transfer demographic changes made in PracSoft to Bp Premier.	PATIENTS.IN
✘	✔	Transfer demographic changes in Bp Premier to PracSoft.	TRANSFER.OUT
✘	✔	Transfer details of chargeable Item Numbers to PracSoft to allow for account to be created	VISITS.OUT
✘	✔	Transfer details of childhood immunisation records to PracSoft to be sent to the AIR register	IMM.OUT

Scroll to the section that applies to your environment.

Set up one-way linking

Configure Bp Premier

1. Create a folder on the Bp Premier server called something like 'BPLinkfiles'. Share this folder so that all users on the network have read and write permissions.
2. On the server, select **Setup** > **Configuration** > **Links** from the main Bp Premier screen.
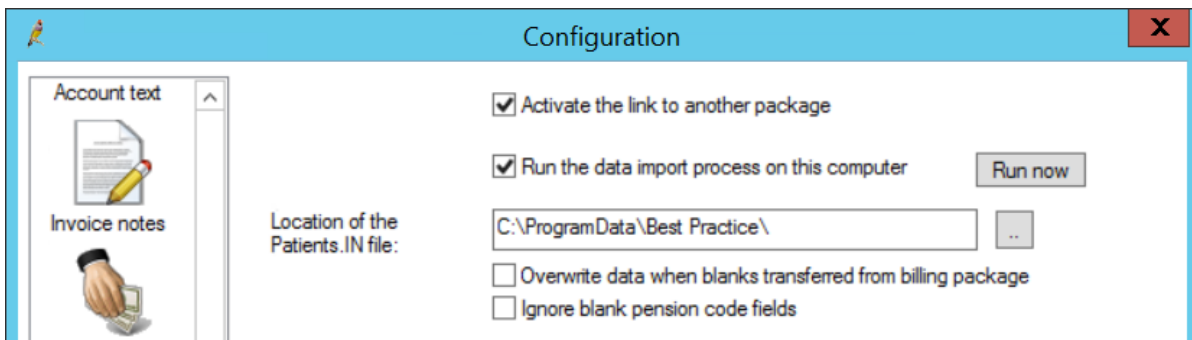
3. Tick **Activate the link to another package**

4. Tick **Run the data import process on this computer**.

5. In **Location of the Patients.IN file**, enter the path to the folder that you created in step 1, for example, 'C:\BPLinkfiles'.

6. Click **Save**.

7. Select the **Bp Service** tab. Tick **Use BP Service for importing links on this machine**.

8. Click **Save**.

For more information about setting up Bp Service to manage billing linking, see **Load Bp Service and testing the link on page 8**.

Configure PracSoft

Complete the following instructions on each PracSoft workstation.

1. From the PracSoft **Waiting Room** screen, select either:
   - **Medical director** > **MD Link Options**
   - **Medical director** > **Demographic export**

   depending upon your version of PracSoft.
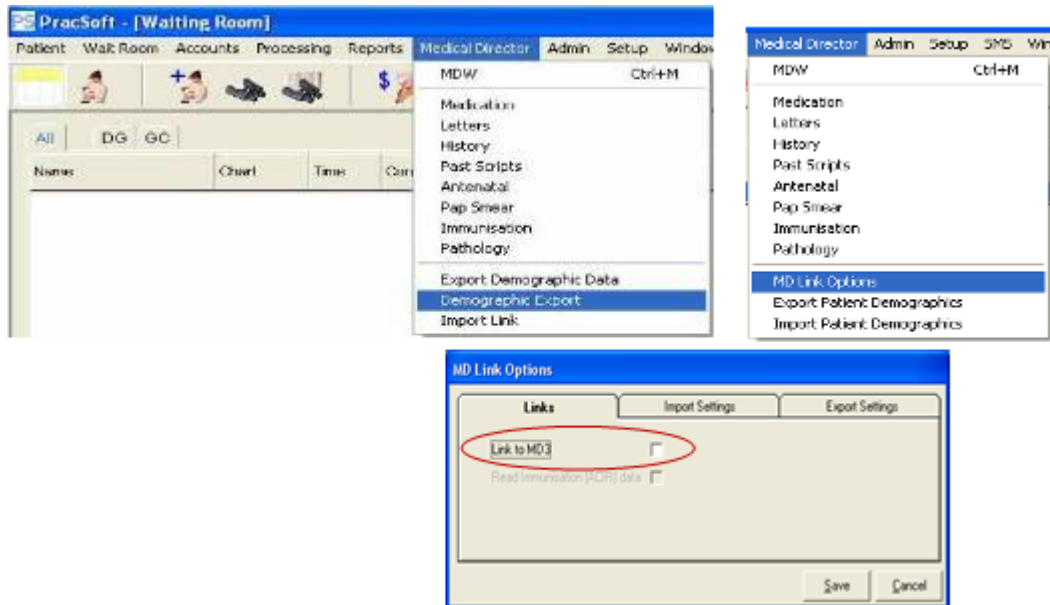
2. If you are using Medical Director 3, on the **Links** tab, untick **Link to MD3**.
3. Select the **Export settings** tab.
4. Tick **Export patient demographics** or **Export folder**, depending on PracSoft version, and browse to the shared folder on the Bp Premier server that you created, for example, '\\servername\BPLinkfiles\'.
5. Test the link using the examples in **Load Bp Service and testing the link on page 8**.

Configuring two-way linking requires you to set up the four types of transferring data individually.

Transfer demographics changes from PracSoft to Bp Premier

To set up transfer of demographics changes from PracSoft to Bp Premier, follow the instructions for one-way link- ing in **Set up one-way linking on page 3**.

Transfer demographics changes from Bp Premier to PracSoft

Complete the following instructions on the Bp Premier server and all workstations.

1. Select **Setup** > **Configuration** > **Links** from the main Bp Premier screen.
2. Tick **Transfer changed demographic data back to the billing package**. This option sends changes made to the patient demographic details in Bp Premier back to PracSoft via the Transfer.out file.

3. Enter the path to the folder on the Bp Premier server that you created in **Set up one-way linking on page 3**.

☑ Transfer changed demographic data back to the billing package

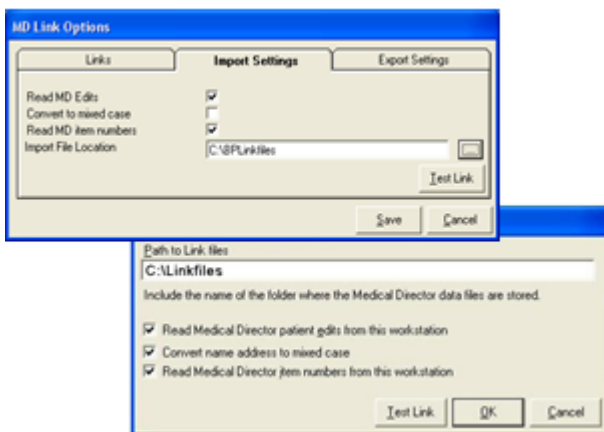Location of the Transfer.OUT file: `C:\BPLinkfiles` [...]

NOTE The path entered here must be a UNC path, for example '\\servername\BPLinkfiles'.

Perform the following instructions on the PracSoft server only.

1. From the PracSoft **Waiting Room** screen, select either:
   - **Medical director** > **MD Link Options** > **Import Settings**
   - **Medical director** > **Import link**

   depending upon your version of PracSoft.

2. Tick **Read MD Edits** or **Read Medical director patient edits from this workstation**, depending upon your version of PracSoft.
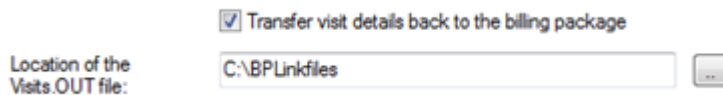

3. Enter the UNC path to the folder on the Bp Premier server that you created in **Set up one-way linking on page 3**.

Transfer visit details from Bp Premier to PracSoft

To configure Bp Premier:

Complete the following instructions on the Bp Premier server and all workstations.

1. Select **Setup** > **Configuration** > **Links** from the main Bp Premier screen.
2. Tick **Transfer visit details back to the billing package** . This option sends Medicare item numbers to PracSoft via the **visits.out** file.

☑ Transfer visit details back to the billing package

Location of the
Visits.OUT file: `C:\BPLinkfiles` `...`

3. Enter the path to the folder on the Bp Premier server that you created in **Set up one-way linking on page 3**.

NOTE The path entered here must be a UNC path, for example '\\servername\BPLinkfiles'.
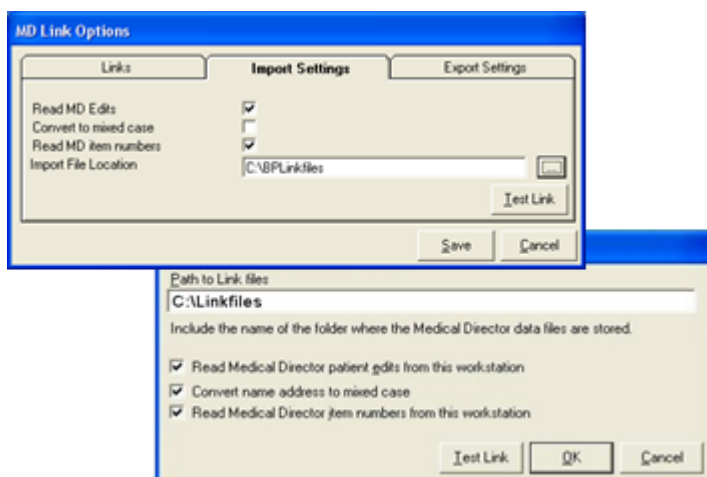

To configure PracSoft:

Perform the following instructions on the PracSoft server only.

1. From the PracSoft **Waiting Room** screen, select either:
   - **Medical director** > **MD Link Options** > **Import Settings**
   - **Medical director** > **Import link**

   depending upon your version of PracSoft.

2. Tick **Read MD Item numbers** or **Read Medical director Item numbers from this workstation**, depending upon your version of PracSoft.

3. Enter the UNC path to the folder on the Bp Premier server that you created in **Set up one-way linking on page 3**.

Transfer immunisation records in Bp Premier to PracSoft

To configure Bp Premier:

Complete the following instructions on the Bp Premier server and all workstations.

1. Select **Setup** > **Configuration** > **Links** from the main Bp Premier screen.
2. Tick **Transfer immunisation data back to the billing package**. This option sends immunisation records to PracSoft via the **Imm.out** file.
3. Enter the path to the folder on the Bp Premier server that you created in **Set up one-way linking on page 3**.

> **NOTE** The path entered here must be a UNC path, for example '\\servername\BPLinkfiles'.

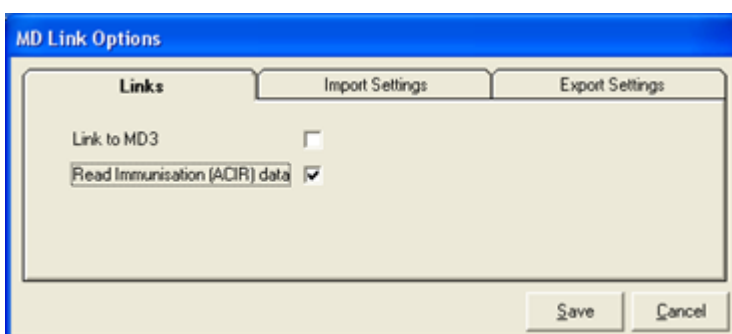4. Tick **Use PracSoft format for immunisation data transfer**.

To configure PracSoft:

Perform the following instructions on the PracSoft server only.

1. From the PracSoft **Waiting Room** screen, select either:
   - **Medical director** > **MD Link Options** > **Links**
   - **Medical director** > **Links**

   depending upon your version of PracSoft.

2. Tick **Read Immunisation (AIR) data**.

3. Click **Save**.

Load Bp Service and testing the link

If you are transferring data between Bp Premier and a billing package, Best Practice Software recommends starting BP Service automatically when starting the Bp Premier server.

Make sure that BP Service is running on the server.

Test transfer of demographic changes from Bp Premier to PracSoft

4. On the Bp Premier server, change the demographics of one patient. Change something insignificant, such as changing 'Street' to 'St' or similar. Save the changes.
5. Open PracSoft and check that the demographic change has been reflected.
6. Repeat this test on at least one other Bp Premier workstation to ensure process is working.

Test transfer of visit Information from Bp Premier to PracSoft

1. Open PracSoft and add a test patient into the Waiting Room. Open the patient in Bp Premier using the MD button. Enter some test notes and click **Finalise Visit**. Enter the **Item Numbers** that you want to charge the patient. Save and close the patient record.
2. Return to PracSoft and check that the item numbers are showing against the patient record, ready to be invoiced.

Test transfer of Immunisation records from Bp Premier to PracSoft

1. In Bp Premier, open a patient record for a child who is under 5 years old. Click on the Immunisation section and record an immunisation for that child. Save and exit the record.
2. Open PracSoft and run the process to import the immunisation batch.
3. If the immunisation was a test, delete the item from the immunisation batch, but if it is a real immunisation, you should have the option to transmit the batch immediately or at a later stage.

Transfer patient demographics to PracSoft

If your practice uses Bp Premier Clinical and uses PracSoft for Management and billing, you can export the entire set of demographic data from Bp Premier and import the data into PracSoft. The process below describes how to export demographic data and create a link that allows patients in the PracSoft Waiting room to be opened in Best Practice.

This procedure is best performed on an empty PracSoft database after a PracSoft installation, but can performed at any time if both databases have been backed up for recovery if necessary.

Before you begin, you need to:

- Contact Best Practice Support and obtain the utility **Set ExternalID.exe**. Support can email you this utility.
- Back up the Bp Premier database and ensure the backup can be restored (for example, on a test BP server).
- Back up the PracSoft database, if the database is not empty.
- Set the user permission **Export demographic data** to 'Allow access' for the user performing the export.
- Set the folder C:\Program Files\Best Practice Software\BPS on the Bp Premier server to 'shared'.

Export patient demographics

1. On the Bp Premier server, copy the utility **Set ExternalID.EXE** obtained from Best Practice into the folder C:\Program Files\Best Practice Software\BPS.
2. Browse to this folder and double-click the file. The utility will update the patient database in Bp Premier to set the External ID number.
3. From the Windows desktop, go to **Start** > **Applications** > **Best Practice Software**. Double-click **BPS Utilities**.
4. Enter a username and password at the **Login** screen and click **OK**.
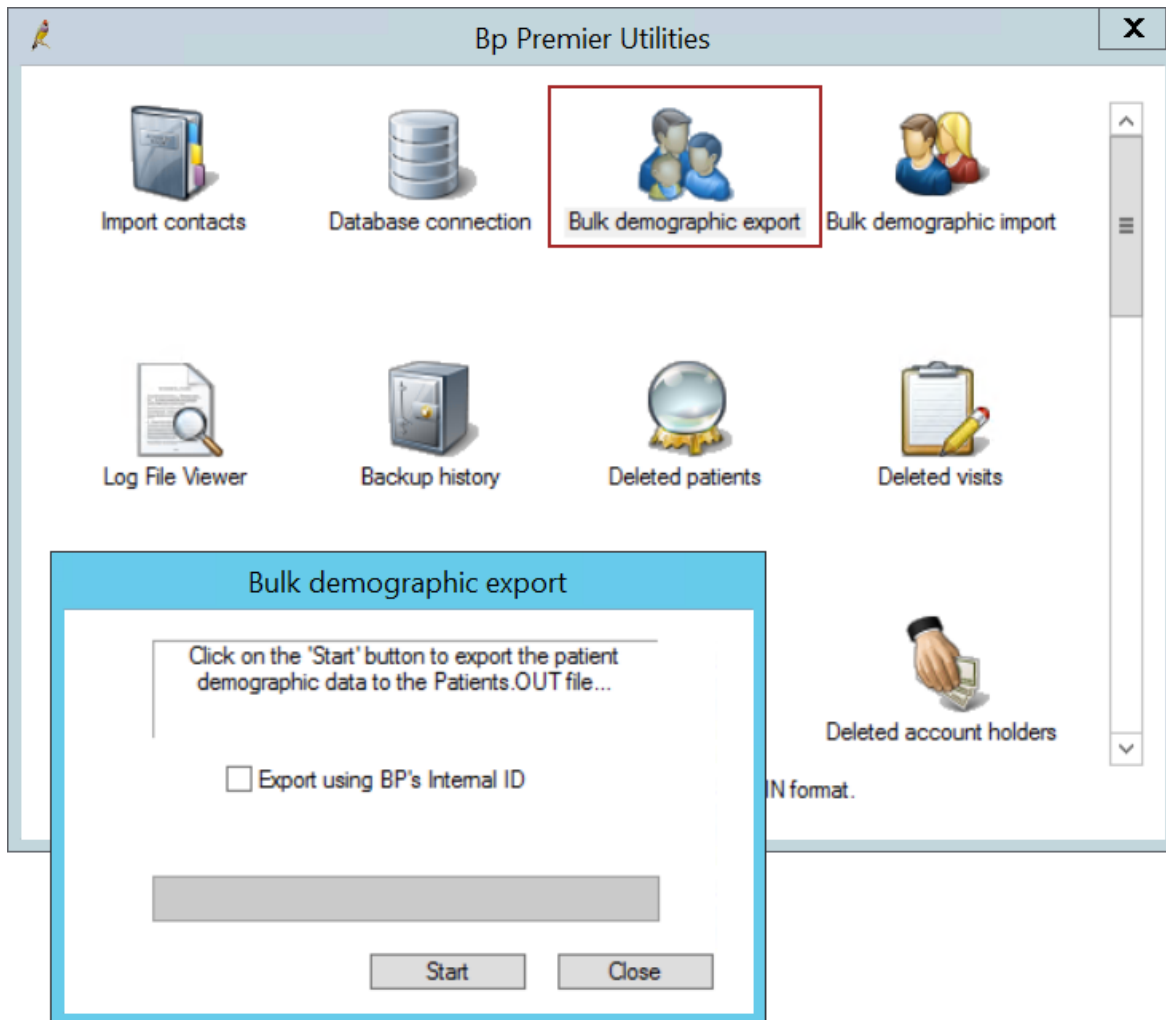
5. Click **Bulk demographic export**.
6. Tick **Export using BP's Internal ID** and click **Start**.
7. Choose a location for the patients file to be created in. After completion, a popup will alert that the demographics have been successfully exported.
8. Browse to the location you selected in step 7 and rename the file from 'Patients.out' to 'Patients.in'.

Import Patient Demographics into PracSoft

1. On the PracSoft server, go to **Start** > **Programs** > **HCN maintenance tool**. Double-click the **Import /Export Utility**.
2. Select patient demographics 'Generic Ascii ii' in a Patients.in file format. Browse to the folder you saved the Patients.in file in step 7and select the file. It may take a few minutes depending upon the number of patients.

3. Test patient linking by adding a patient to the appointment book in PracSoft and clicking **Open MD**. The patient record should open in Bp Premier. Check that if you edit an existing patient's demographic details in PracSoft, the changes are reflected in Best Practice.

4. As a precaution, delete or move the Patients.in file to another folder to prevent the file being accidentally imported again.
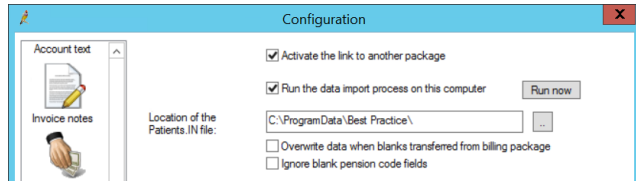

NOTE For a complete step by step guide to importing a patients.in file into PracSoft, contact HCN PracSoft support.

Troubleshoot billing linking

Customers can link Bp Premier to certain third party billing packages to allow the transfer of demographic data. Occasionally, the link can fail due to various issues. Below are some common causes of link failure and how to resolve them.

IMPORTANT   If a patient demographic record has not been transferred from your billing package, do **not** manually enter them into your Bp Premier clinical module before troubleshooting the link. Manual entry often leads to duplicated files with separate data, which requires data re-entry or merging.

Do not duplicate the patient in the billing package. Any record created in the billing package will need to be paired with a like entry in Bp PremierClinical.

Problem	Solution
BP Service is not running on the server computer	Ensure that BpService is running in Windows Services.
Link options have not been set in Bp Premier.	Ensure that the **Location of the Patients.IN** field is correct and the folder actually contains a file named 'patients.in'. The Bp Premier user must have access to the **Setup > Configurations** menu. If there is no patients.in file, refer to your billing package documentation or network administrator to obtain the location of this file.
Another clinical package is open (for example, Medical Director) that also has a link to billing package option set. A race for the link file occurs: the first package to access the link file imports the patient demographic change and purges the link file.	Ensure that any legacy clinical packages do not have link to billing package options set. For more information on how to do this, refer to the package's help file, or contact your network administrator.
Another "Link file processor" type utility is running somewhere on the network.	Ensure that any instances of a Link file processor type utility are disabled (including removing any **Load at startup** options). For more information on how to do this, refer to the package's help file, or contact your network administrator.

Retesting

In the event of another package or a link file utility reading and purging the link file:

1. Check all steps listed above and ensure that all instances of other clinical packages and link file processor type utilities no longer access the link file.
2. Perform a minor change to any patients demographic in the billing package (for example, change "st" to "street"). This should rewrite the demographics to the link file and give Bp Premier the opportunity to read the data.