How do I install Best Practice when converting data from Medical Director?

This FAQ is intended to provide the steps required to perform the installation of Best Practice Software with a conversion of data from MD2 or MD3. Please read through this guide and familiarise yourself with it prior to undertaking the task of converting to Best Practice. We strongly recommend printing this document and the associated FAQs to have on site at the time of conversion to assist with the process. Please do not hesitate to contact Best Practice Software for clarification or help with conversion specific queries.

A Trial Conversion of your data must be performed before a minimum of 2 weeks prior to your expected GO LIVE date.

MD data conversion checklist: (please refer to expanded notes below for full details)

Trial conversion

- ☐ Contact Best Practice to obtain the latest version of the software
- ☐ Confirm Hardware, Hard disk space and Operation System requirements
- ☐ Ensure your MD data is in good condition
- ☐ Obtain a current backup of MD data
- ☐ Install evaluation version of Best Practice on secondary 'test' machine as a 'server' installation
- ☐ Perform trial MD conversion on test machine (see document *BP_FAQ-Converting MD2.pdf or BP_FAQ-Converting MD3.pdf* for further details)
- ☐ Check data thoroughly to ensure that all data converted correctly
- ☐ Complete the form '*BP_FAQ-Trial Conversion completion notification form.pdf'* and forward to Best Practice support@bpsoftware.com.au together with the file BPSConversion.log.

Live conversion

- ☐ Ensure you have your invoice and 30 day activation licence key. This should be received after submitting your '*Trial Conversion complete notification'* as outlined above.
- ☐ Install Best Practice as a 'server' installation on Live server
- ☐ Check Drug database date in Best Practice and download & install any later data updates from www.bpsoftware.com.au
- ☐ On Conversion date, perform a complete backup of the Live server (data & system) including your MD data.
- ☐ Perform 'Live' conversion from this MD data. Enter the 30 day activation key when prompted. (Refer to the documents *BP_FAQ-Converting MD2.pdf or BP_FAQ-Converting MD3.pdf* for more info)

While conversion is taking place:-

- ☐ Install Best Practice as a 'client' installation on all work stations
- ☐ Open Best Practice on each workstations and connect to BP instance on server
- ☐ Configure link options, if linking to 3rd party billing program (Refer to FAQ's for more info)
- ☐ Configure Pathology and Radiology results import (Refer to FAQ' s for more info)
- ☐ Configure Pathology and Radiology request forms (Refer to FAQ's for more info)

When conversion is complete:-

- ☐ Check ALL data carefully to ensure that conversion has been successful. (e.g. Access the last patient updated in MD prior to the conversion to ensure their visit is present)
- ☐ Setup Practice details and enter 30 day licence key (if not done during the MD conversion step) and ensure that the key is for the correct number of users.
- ☐ Review user permissions to ensure they have appropriate access. (Note: Always ensure one 'trusted' user has full permissions & the password for this user is secured in fireproof safe for emergency access)
- ☐ Check that links to billing package are working correctly to transfer patient demographics
- ☐ Disable shortcuts to MD to ensure staff can't accidentally use the wrong system.

User customisation

- ☐ Have each user log into their workstation to configure their Printer settings & Preferences

Tip: F.A.Q.'s can be accessed by browsing to the \FAQ folder on the Best Practice installation DVD.

Installation Steps

This guide is setup into three (3) sections:

1. Perform an Evaluation installation and a Trial conversion (**MANDATORY**)
2. Obtain an Invoice and 30day licence key.
3. Perform a Live installation, conversion and configuration.

This article should be used a guide, but should not be considered all inclusive. Normal system maintenance and backup procedures should be observed before making any system changes.

1) Perform Evaluation installation and a TRIAL CONVERSION of MD data (MANDATORY)

Important: It is **MANDATORY** that all sites perform a Trial conversion prior to GO LIVE

1. To ensure that the source data converts successfully
2. To resolve any issues related to conversion prior to the GO LIVE
3. To clarify the process and identify the time required to complete the conversion

To Install & Convert from Medical Director:

1. Follow the instructions referred to in the relevant document for the steps involved to set up your machine ready for conversion and to convert your data into Best Practice:-
   - MD2 - refer to the document BP_FAQ-Converting MD2.pdf
   - MD3 - refer to the document BP_FAQ-Converting MD3.pdf
2. Following the successful conversion of the data, open Best Practice and login using a User id and password that was active in MD.

Important:

3. **Once the 'Trial' conversion is completed, we request that the principal doctor/s perform a thorough check of as many patient records as possible to ensure that all notes, investigations, documents, etc., are available and accessible.**
4. **Complete the form 'BP_FAQ-Trial Conversion completion notification form.pdf' and sign and fax to Best Practice on 07 4153 2093.**
5. **Email the BPSConversion.log file generated from the latest test conversion to support@bpsoftware.com.au together with your contact details.**

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2) Obtain Invoice and 30 Day Licence key

Once you have confirmed that the MD data conversion has been successful and just prior to you wishing to GO LIVE with Best Practice, you need to obtain a 30 Day licence key. **This key can only be provided if we have received the 'Trial Conversion complete notification' form from your practice.**

This key will allow you to do a LIVE installation of the software and use the software until the invoice has been paid. At that time you will receive your 12 month licence key which will allow Best Practice to continue being fully functional until your subscription is due again.

The licence key registers you for the appropriate modules and number of users (Best Practice Clinical, Management and Top Pocket Modules are controlled by this key).

Please contact Best Practice Software to obtain this licence key.

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3) Perform a Live Installation and Conversion

Note: Ensure that you have the latest version of Best Practice installed and the latest drug database update applied.

1. Follow the instructions referred to in the relevant document for the steps involved to set up your machine ready for conversion and to convert your data into Best Practice.
   a. MD2 - refer to the document BP_FAQ-Converting MD2.pdf
   b. MD3 - refer to the document BP_FAQ-Converting MD3.pdf

While the conversion is taking place:-

2. Install the Best Practice Client (Select "Client" when installing) on all *workstations.* (Terminal server users can disregard workstation installation)
3. Open each Best Practice client in turn - when prompted, select the BP server from the list of servers. Close BP Clients. (If this box is not populated - please check that no firewall hardware or software is blocking ports between server and workstations. Refer to the document BP_FAQ-Client not connecting to Server.pdf)

When conversion is completed - **Check ALL data carefully prior to going LIVE** to ensure that data has converted correctly.

4. Check the BPSConversion.log file again to ensure there are no errors indicated.
5. We strongly recommend that another check of the data be performed 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 Best Practice. We also recommend checking the last patient seen before the conversion to ensure that the most recent data has been converted.

When you have confirmed that the conversion is complete and the data is correct:-

6. If you are continuing to use a third party billing package you will need to configure the Link options with Best Practice. Open Best Practice on the server and configure the Link options to your Billing Package as per the following documents:-
   - PS 3 use BP_FAQ-LinkBPtoPS3.pdf,
   - PS 2 use BP_FAQ-LinkBPtoPS2.pdf,
   - Other Billing Software use BP_FAQ-LinkBPto3rdParty.pdf (*Please contact your software helpdesk for preferred link options for that application)*
   - Add a new patient in the billing package and ensure that the patient transfers into BP *(this will take up to one minute to transfer).*
   - Change an existing patient demographic in the billing package (St -> Street or visa versa) and ensure the demographic is updated in BP *(this will take up to one minute to transfer).*

Note: Terminal Server sessions will not run or display the BP Link.exe - this must be configured and run when logging in directly to the server console and not while in terminal mode. The BP Link.exe is not configured as a system service, therefore the operating system must be logged in and the BP Link.exe running on the server for automatic Linking to billing, Pathology import and BP Scheduled back ups to occur.

7. If you are using Best Practice Management, refer to the document BP_FAQ-Setting up Management G2W.pdf for details on the steps you need to follow to set up Management such as user permissions, appointment sessions, practice fees, etc.
   a. Log into MD and remove any links that existed to your third party billing package to eliminate any conflicts with Best Practice.
8. Set up Results Import options as per the document BP_FAQ-ResultsImport.pdf - if pathology or radiology is to be downloaded. (This may require information from your Pathology / Radiology provider to assist in locating and/or specifying a download folder for results).

9. Set up Pathology & Radiology forms as per the documents BP_FAQ-Pre-printedX-rayForms.pdf and BP_FAQ-PathForms.pdf.
10. Close BP on the server.
11. Update Practice Details and key (**Setup -> Practice Details -> Change**). Update Practice details and enter 30 day Licence key details -> save.
12. Select **Help -> About -> System Info** to check that the Licence details entered are for the correct number of full time and part time doctors.

System Configuration

13. Check user permissions for all users to ensure they have appropriate access. (Note: Always ensure one 'trusted' user has full permissions & the password for this user is secured in fireproof safe for emergency access)
14. Have each user log into their workstation to:-
    a. Configure Preferences – Setup > Preferences
    b. Configure Printers – Setup > Configuration > Printers

A summary of the FAQ Sheets mentioned in this document are:-

- BP_FAQ-Hardware.pdf
- BP_FAQ-Uninstall.pdf
- BP_FAQ-Installing - version 1.6.0.395 and above.pdf
- BP_FAQ-Converting MD2.pdf
- BP_FAQ-Converting MD3.pdf
- BP_FAQ-LinkBPtoPS3.pdf
- BP_FAQ-LinkBPtoPS2.pdf
- BP_FAQ-LinkBPto3rdParty.pdf
- BP_FAQ-ResultsImport.pdf
- BP_FAQ-Pre-printedX-rayForms.pdf
- BP_FAQ-PathForms.pdf
- BP_FAQ-Client not connecting to Server.pdf
- BP_FAQ-Setting up Management G2W.pdf

Tip: Additional FAQ's on configuring Best Practice are located in the FAQ directory on the DVD. Help files are available from anywhere in the application by pressing F1.

MORE INFORMATION

For more information consult the Best Practice Help Library or contact us via:

07 4155 8800

07 4153 2093

support@bpsoftware.com.au

http://forum.bpsoftware.com.au

http://www.bpsoftware.com.au

sales@bpsoftware.com.au

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