How do I set up the Best Practice Clinical Module?

This FAQ is intended to answer the common questions about setting up and configuring the Clinical Module of Best Practice Software.

Tip: There are a wide range of F.A.Q. documents accessible by browsing to the \FAQ folder on the Best Practice installation DVD.

Prerequisites

It is assumed that you have already performed the following steps:-

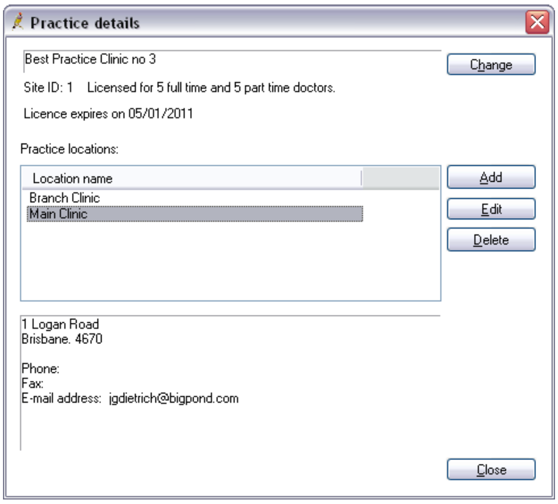
- Installed Best Practice on your server and workstations (refer to the document 'BP_FAQ-Installing.pdf*).*
- Logged into Best Practice at least once on the server and each workstation to configure connection to your server (refer to the document 'BP_Samples.pdf'*).*
- Performed a conversion if relevant (refer to the 'BP_FAQ-Converting MDx.pdf' or 'BP_FAQ-Converting MT32.PDF').
- Obtained and entered the Best Practice licence key information. If you do not have this key, contact Best Practice to obtain this licence key to enable you to use the full functionality of the system

Summary of steps to set up Clinical Module

- **Practice Details**
- **Configuration**
    - **Results import**
    - **Links**
    - **Database**
    - **Lists**
    - **Reminders**
    - **Care plans**
    - **Email**
    - **Messages**
- **Users**
    - **User permissions**

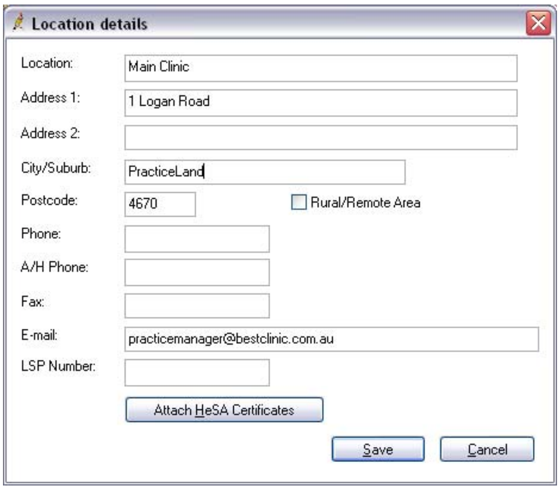
Setting up Practice Details

If you have converted your data into Best Practice from another package, the practice details will contain the same information as the old system. If you are starting from an empty database, you are prompted to enter the Practice details when you first log into Best Practice.



Before using Best Practice you should check that these Practice details are correct as they are used when printing scripts, invoices, receipts, etc.

To update Practice Details, select **Setup > Practice details** from the main Best Practice screen. The practice details screen will appear as shown here.



Click the **'Change'** button to change the main Practice name, ABN number, VSP number. This is also where you enter your Licence key to activate Best Practice.

There also needs to be at least one practice location record. These records contain the Location, Address, phone number, fax, email and LSP number.

Click '**Add'** to enter a new location or highlight the relevant location and click '**Edit'**.

It is possible to enter multiple locations if applicable. These locations can be allocated to a user so that when they log in the correct address, etc will print on their scripts, etc.

Configuration

1. If you are using 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)*
2. Set up Results Import options as per the document BP_FAQ-ResultsImport.pdf - if pathology is to be downloaded. (This may require information from your Pathology provider to assist in locating and/or specifying a download folder for Pathology results).
3. Set up Pathology & Radiology forms as per the documents BP_FAQ-Pre-printedX-rayForms.pdf and BP_FAQ-PathForms.pdf .
4. Start BPLink on the server. This can be found under Start > Program files > Best Practice Software > Best Practice > BPLink. This program must run continually on the server as it is function that checks periodically for Results and Patient demographic changes waiting to be processed and also performs the Scheduled backup. When run the first time, a bird icon will appear in the system tray.

> **Note:** Terminal Server sessions will not run or display the BP Link.exe - this must be configured and run from the server not 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.

5. Update Practice Details and key (Setup menu -> Practice Details -> Change). Update Practice details and enter 30 day Licence key details -> save.
6. Select Help -> About -> System Info -> to check that the Licence details entered are for the correct number of full time and part time doctors.
7. Check Drug database date in Best Practice (Help -> About -> System Info) and check the date in "Drug Database Updated". Check this against www.bpsoftware.com.au and if any newer data updates are available, download them in chronological order and install to the server only. (Check Help -> About -> System Info after each installation to ensure the drug data has been updated)
8. 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).*
9. 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).*

10. 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)
11. Have each user log into their workstation to:-
    a. Configure Preferences – Setup > Preferences
    b. Configure Printers – Setup > Configuration > Printers

Tip: Our complete set of FAQ documents is located in the FAQ directory on the installation DVD. Help files are also available from anywhere in the application by pressing F1.

Additional steps for setting up 'new' practice installations

Patient demographics

If you have not converted from MD2 you will need to input your patient demographic information. Refer to the Best Practice Help screen *Best Practice Clinical > Entering Patient Information > Add New* for instructions on how to add Patient demographic records.

Contacts

Contacts are individuals, companies or institutions who you wish to keep contact details for in the database. Refer to the Best Practice Help screen Best Practice Clinical > Main Menu > View Menu > Contacts for instructions on how to add Contact records.

Best Practice Linking

If linking to a 3rd party Management / Billing package, it is important that the settings in your Billing Software and in the BP configuration screen point to the same folders.

Please refer to BP_FAQ-LinkBPtoPS2.pdf, BP_FAQ-LinkBPtoPS3.pdf and BP_FAQ-NotLinking.pdf for more information on setting up links to Best Practice Software.

Best Practice Pathology and Radiology Importing

The results import configuration window allows the configuration of result importing settings for investigations. If you have multiple laboratories and multiple 3rd party downloading software, you can configure each path to the required files for importing. Best Practice will automatically import the downloaded result files on a regular basis (every 1 minute).

Please refer to BP_FAQ-ResultsImport.pdf and BP_FAQ-PathologyG2W.pdf for more information on Pathology in Best Practice. A similar process can be followed for configuring Radiology importing.

Best Practice Pathology Forms

Best Practice uses the standard for the pathology forms. You have the option to print on plain paper or on pre-printed forms. Please refer to BP_FAQ-PathForms.pdf for more information on setting up Pathology forms in Best Practice.

Best Practice Radiology Forms

Best Practice provides the ability to set up pre-printed X-ray forms from your preferred Radiology laboratory. Please refer to BP_FAQ-Pre-printedX-rayForms.pdf for more information on pre-printed X-ray forms.

Best Practice Bulk Document Import

Best Practice provides the ability to scan directly to a patients file without the need to run Best Practice Software application. This is very convenient for some practice's that have a dedicated computer specifically set up for scanning documents.

Note: 'Bulk document import.EXE' can be found in the following path: C:\Program Files\Best Practice Software\BPS\Bulk document import.EXE.

Please refer to BP_FAQ-BulkDocImport.pdf for more information on Bulk Document Importer.

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

- BP_FAQ-Installing.pdf
- BP_Samples.pdf'
- BP_FAQ-ConvertingMDx.pdf
- BP_FAQ-ConvertingMT32.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

MORE INFORMATION

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

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