



Smart Referrals

Practice set up form

Practice name See Registration guide (pg 3) for instructions					
Practice phone					
PHN					
ADDRESS					
Street					
Suburb					
Postcode					
PRACTICE DETAILS					
HPI-O	800 For more information on HPI-O numbers see Registration guide HPI-O section.				
Clinical software	Best Practice* Medical Director Software version: * Best Practice users will need to have their Best Practice database password available for setup.				
Number of GPs who will use Smart Referrals List the name of GPs to use Smart Referrals on pg 13					
BP/MD ID See your Clinical Software: Help > About					
Terminal server setup See Registration guide (pg 7) for instructions	Yes	No	If yes, IE version 11 or above?	Yes	No
The following items need to be checked/installed on every workstation at the practice that will use Smart Referrals					
Windows version See Registration guide (pg 8) for instructions	If the PCs in your practice have different versions of Windows and/or internet browsers, please include this information on pg 14.				
Internet browser used & version See Registration guide - (pg 9) for instructions	Internet Explorer	Chrome	Other (please specify)		
NASH Certificate (Practice Medicare NASH Certificate) current and available	Yes	No	Expiry date: Note: this may need to be current and installed on every PC used to send eReferrals depending on your IT set up. To find if your NASH is current, see the registration guide (pg 10).		
KEY CONTACT					
Name					
Phone					
Email					
IT CONTACT					
Name					
Phone					
Email					

Smart Referrals check list before installation

If you are unable to complete or unsure of any items below please contact your IT provider.

Best Practice Install check

General Information:

- ☐ Best Practice Site ID (see Registration guide pg 6 for instructions)
- ☐ The practice is on Best Practice Premier/LAVA. (see Registration guide pg 6 for instructions)
- ☐ Best Practice Database Browser password available (IT provider will have this, it is not the password into BP)
- ☐ Windows environment: 7 and above (Smart Referrals will not work on Windows XP) on **every workstation** at the practice (see Registration guide pg 8 for instructions)
- ☐ IE (Internet Explorer) version 11 and above on **every workstation** at the practice
- ☐ HPI-O for the practice (see Registration guide pg 4 for instructions)
- ☐ IT provider contacted and aware of install
- ☐ NASH certificate available if required
- ☐ Microsoft .NET version is 4.5 or above (see Registration guide pg 11 for instructions)
- ☐ GP information up to date in the Queensland Health STS address book

Medical Director Install check

General Information:

- ☐ Medical Director ID (see Registration guide pg 6 for instructions)
- ☐ The practice Medical Director version is 3.17.1 or above (see Registration guide pg 6 for instructions)
- ☐ Windows environment: 7 and above (Smart Referrals will not work on Windows XP) on **every workstation** at the practice (see Registration guide pg 8 for instructions)
- ☐ IE (Internet Explorer) version 11 and above on **every workstation** at the practice (see Registration guide pg 9 for instructions)
- ☐ HPI-O for the practice (see Registration guide pg 4 for instructions)
- ☐ IT provider contacted and aware of install
- ☐ Practice is on a Terminal Server configuration – version 3.17.1 or above of Medical Director. (see Registration guide pg 7 for instructions)
- ☐ NASH certificate available if required
- ☐ Microsoft .NET version is 4.5 or above (see Registration guide pg 11 for instructions)
- ☐ GP information up to date in the Queensland Health STS address book

This practice setup form will need to be completed for each practice. Please return this completed form to your HHS Smart Referrals Project Team. Once this is done an appointment will be made for installation and basic training of Smart Referrals. **If you have any questions or concerns please email your HHS Smart Referrals Project Team.**

Registration guide

This guide will provide you with the necessary steps to ensure you have all the information needed to register to use Smart Referrals. Please ensure the details in the set up form are correct, the instructions below will assist in finding information where required.

Please complete the Smart Referral Installation checklist before returning this form to Smart Referrals, **if you need assistance with any items please contact your IT support.**

Please note:

- A minimum of **15 minutes** for each workstation installation leaving time for troubleshooting if required.
- On the day we need a user with **administrator** privileges to login to Windows and have a GP PMS account available.

Every practice wishing to use Smart Referrals must agree to the terms and conditions.

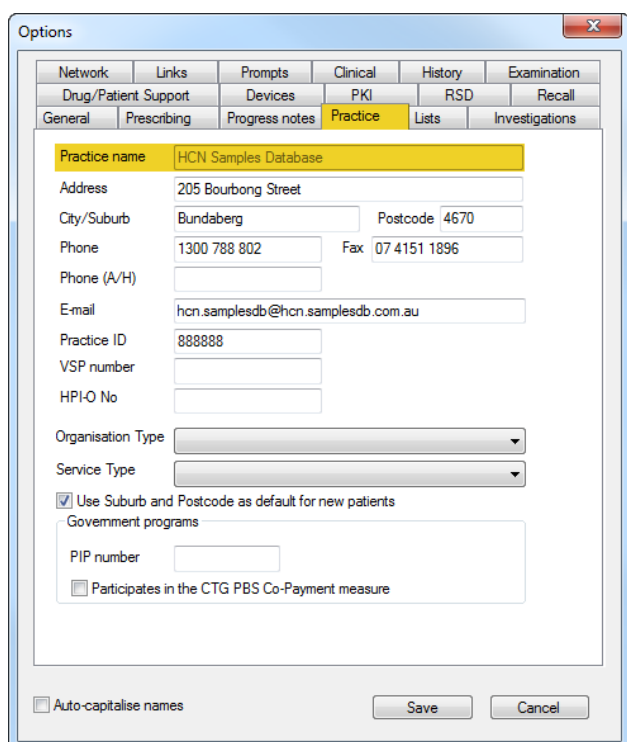
Practice name

For Smart Referrals to provide e-referral recipients with accurate information, the practice name in your clinical software must reflect your actual business name. To change your Location/Practice Name in your clinical software to your actual business name, please see below.

Medical Director

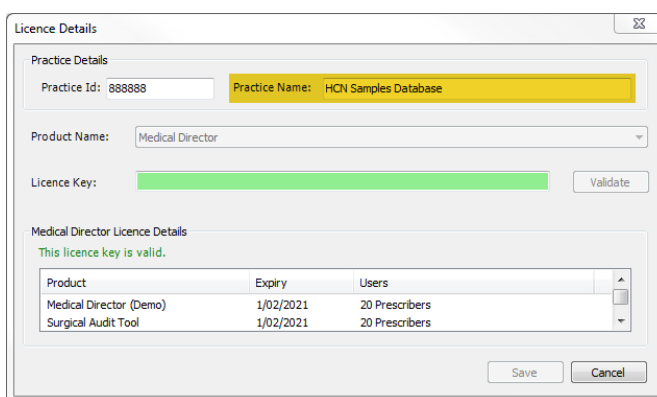
Your practice name can be found by clicking **Tools > Options** on the Medical Director toolbar. Once the options are open click the **Practice** tab to view your practice name. See the area in yellow in **Figure 1**.

If your practice name needs to be edited click **Set up > Set up users** from the Medical Directory toolbar. Once the license details are open enter your correct practice name and click save. See **Figure 2**.



The screenshot shows the 'Options' dialog box with the 'Practice' tab selected. The 'Practice name' field is highlighted in yellow and contains the text 'HCN Samples Database'. Other fields include Address, City/Suburb, Postcode, Phone, Fax, E-mail, Practice ID, VSP number, HPI-O No, Organisation Type, Service Type, and checkboxes for 'Use Suburb and Postcode as default for new patients', 'Government programs', 'PIP number', and 'Participates in the CTG PBS Co-Payment measure'.

Figure 1. Medical Director practice name



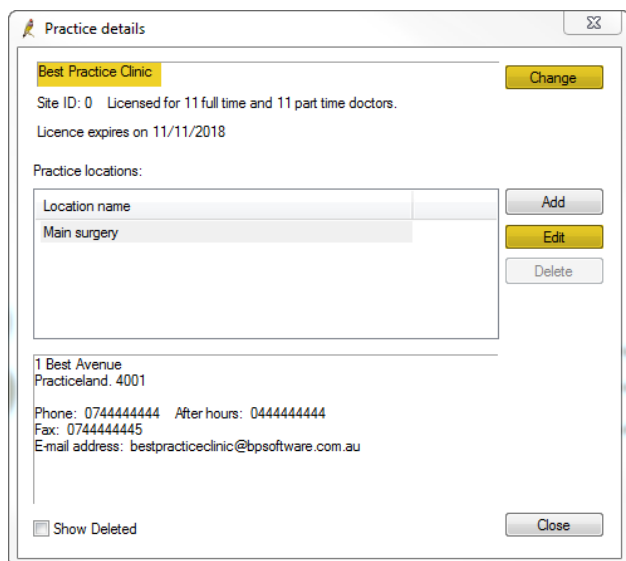
The screenshot shows the 'Licence Details' dialog box. The 'Practice Name' field is highlighted in yellow and contains the text 'HCN Samples Database'. Other fields include Practice Id, Product Name, Licence Key, and a table for Medical Director Licence Details.

Product	Expiry	Users
Medical Director (Demo)	1/02/2021	20 Prescribers
Surgical Audit Tool	1/02/2021	20 Prescribers

Figure 2. Edit practice name in Medical Director

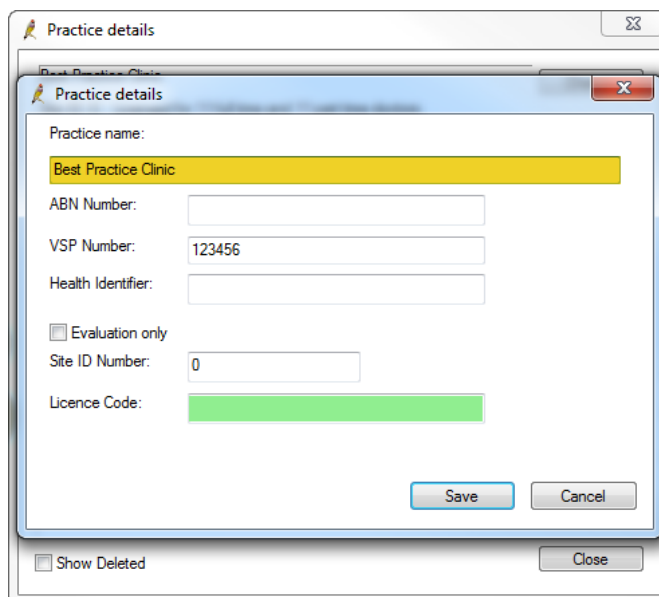
Best Practice

Your practice name can be found by clicking **Set up > Practice details** from the Best Practice toolbar. If your practice name needs edit you can do this by clicking **Change**, see the areas highlighted in **Figure 3**, enter the correct name and click save. See **Figure 4**. To modify any location names click the **Edit** button shown in **Figure 3**.



The screenshot shows the 'Practice details' window. The 'Practice name' field is highlighted in yellow and contains 'Best Practice Clinic'. Below it, the 'Site ID' is 0, and the 'Licence expires on' is 11/11/2018. The 'Practice locations' section has a table with one row: 'Main surgery'. The 'Add', 'Edit', and 'Delete' buttons are visible. The 'Phone' and 'Fax' fields are also visible.

Figure 3. Best Practice practice name



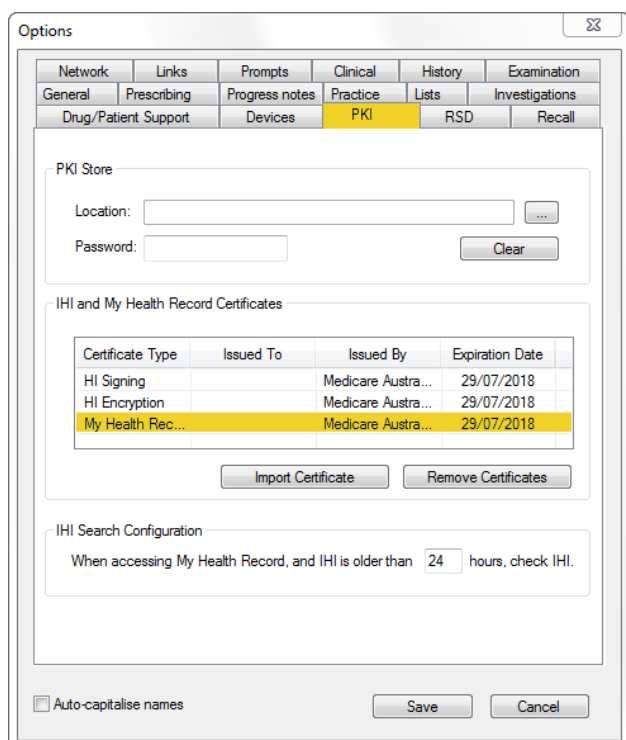
The screenshot shows the 'Practice details' window with the 'Practice name' field highlighted in yellow. The 'ABN Number' field is empty. The 'VSP Number' field contains '123456'. The 'Health Identifier' field is empty. The 'Evaluation only' checkbox is unchecked. The 'Site ID Number' field contains '0'. The 'Licence Code' field is highlighted in green. The 'Save' and 'Cancel' buttons are visible.

Figure 4. Edit practice name in Best Practice

HPI-O details

Medical Director

Your practice HPI-O number can be found by clicking **Tools > Options** from the Medical Director toolbar. Once the options are open click the **PKI** tab. Under the **IHI and My Health Record Certificates** section double click **My Health Rec...** to open the certificate details. The HPI-O number is listed beside **Issued To**. See areas in yellow in **Figures 5 and 6**.

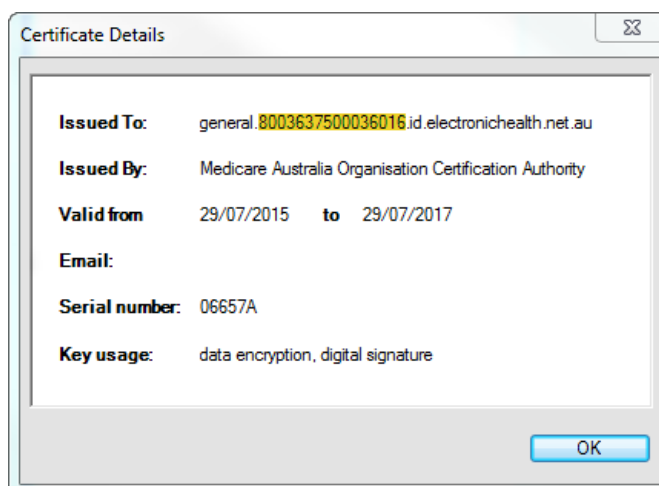


The screenshot shows the 'Options' window with the 'PKI' tab selected. The 'PKI Store' section has a 'Location' field and a 'Password' field. The 'IHI and My Health Record Certificates' section has a table with the following data:

Certificate Type	Issued To	Issued By	Expiration Date
HI Signing		Medicare Austra...	29/07/2018
HI Encryption		Medicare Austra...	29/07/2018
My Health Rec...		Medicare Austra...	29/07/2018

The 'My Health Rec...' row is highlighted in yellow. Below the table are 'Import Certificate' and 'Remove Certificates' buttons. The 'IHI Search Configuration' section has a checkbox for 'Auto-capitalise names' and a 'Save' button.

5. Medical Director PKI certificates



The screenshot shows the 'Certificate Details' window. The 'Issued To' field contains 'general.8003637500036016.id.electronichealth.net.au'. The 'Issued By' field contains 'Medicare Australia Organisation Certification Authority'. The 'Valid from' field contains '29/07/2015' and the 'Valid to' field contains '29/07/2017'. The 'Email' field is empty. The 'Serial number' field contains '06657A'. The 'Key usage' field contains 'data encryption, digital signature'. The 'OK' button is visible.

Figure 6. Medical Director HPI-O number

Best Practice

Your practice HPI-O number can be found by viewing the certificate details via the certificate manager. Click the Start button , type certmgr.msc into the search box at the bottom of the page and press Enter.

Under **Certificates - Current User** expand the **Personal** folder and click the **Certificates** folder. Certificates installed will be displayed in the right hand pane. You will see a NASH cert that begins with **general.80031234626**, see **Figure 7**. This is your HPI-O number.

To view the full details double click the certificate, the HPI-O is displayed beside **Issued To**. See the areas in yellow in **Figure 8**.

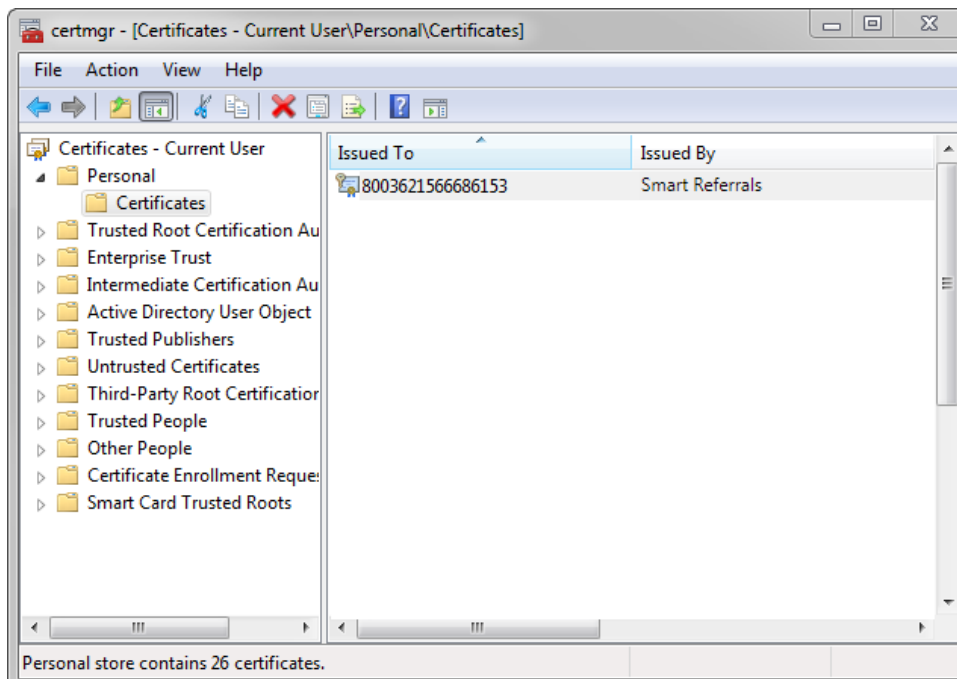


Figure 7. Certificate manager

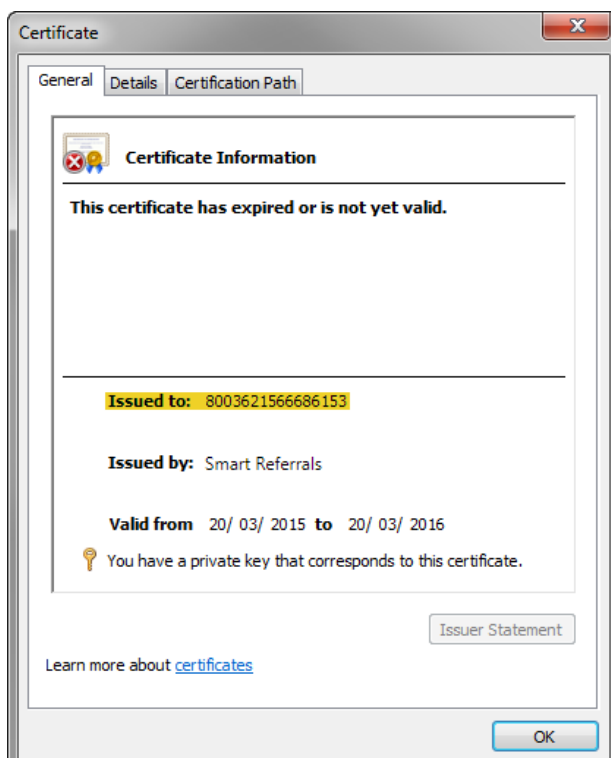


Figure 8. Best Practice HPI-O number

Clinical software details

Medical Director

The Medical Director software version and practice ID can be found by clicking **Help > About...** from the Medical Director toolbar. See areas in yellow in **Figure 9**.

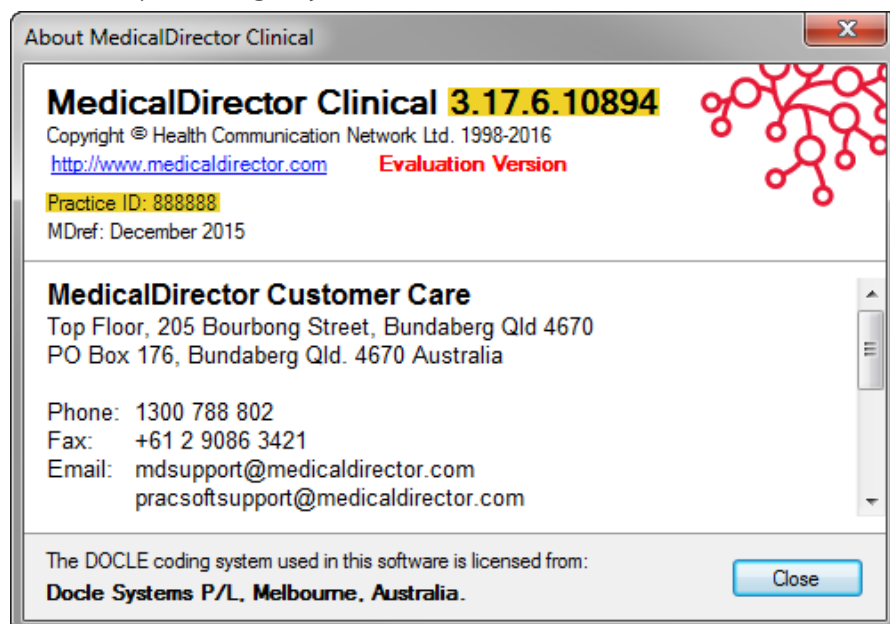


Figure 9. Medical Director details

Note: Medical Director version 3.17a has a known bug where Medical Director is advising practices to update to 3.17.1. Alternatively, you can contact BPAC Clinical Solutions for a Medical Director patch to fix the issue.

Best Practice

The Best Practice software version and site ID can be found by clicking **Help > About** from the Best Practice toolbar. See areas in yellow in **Figure 10**.



Figure 10. Best Practice details

Terminal server set up

One way to identify if you are running a terminal server is if you are accessing your clinical software via **Remote Desktop Connection**. Remote Desktop Connection is accessed using the icons shown in **Figure 11**, you will then be prompted to connect. Once connected you will see the blue bar shown in **Figure 12** at the top of your screen.

If you follow the step above you are likely running a terminal server environment. If you have any questions or concerns regarding terminal servers, please contact your IT support to confirm.

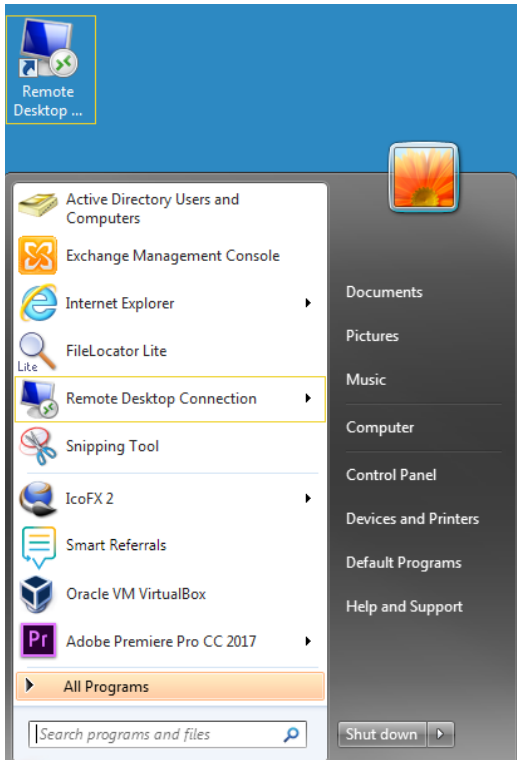


Figure 11. Remote Desktop Connection icons.

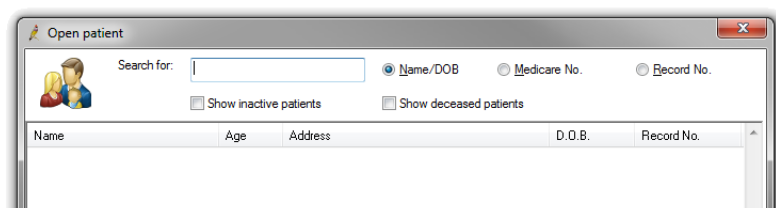
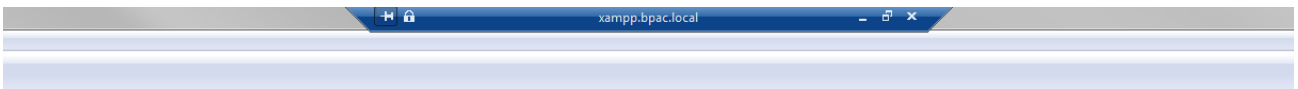


Figure 12. The Remote Desktop Connection toolbar

Windows version

To find your windows version click the **Start button**  > **Control Panel** > **System**. The windows version is listed under the Windows edition section. See areas in yellow in **Figure 13**.

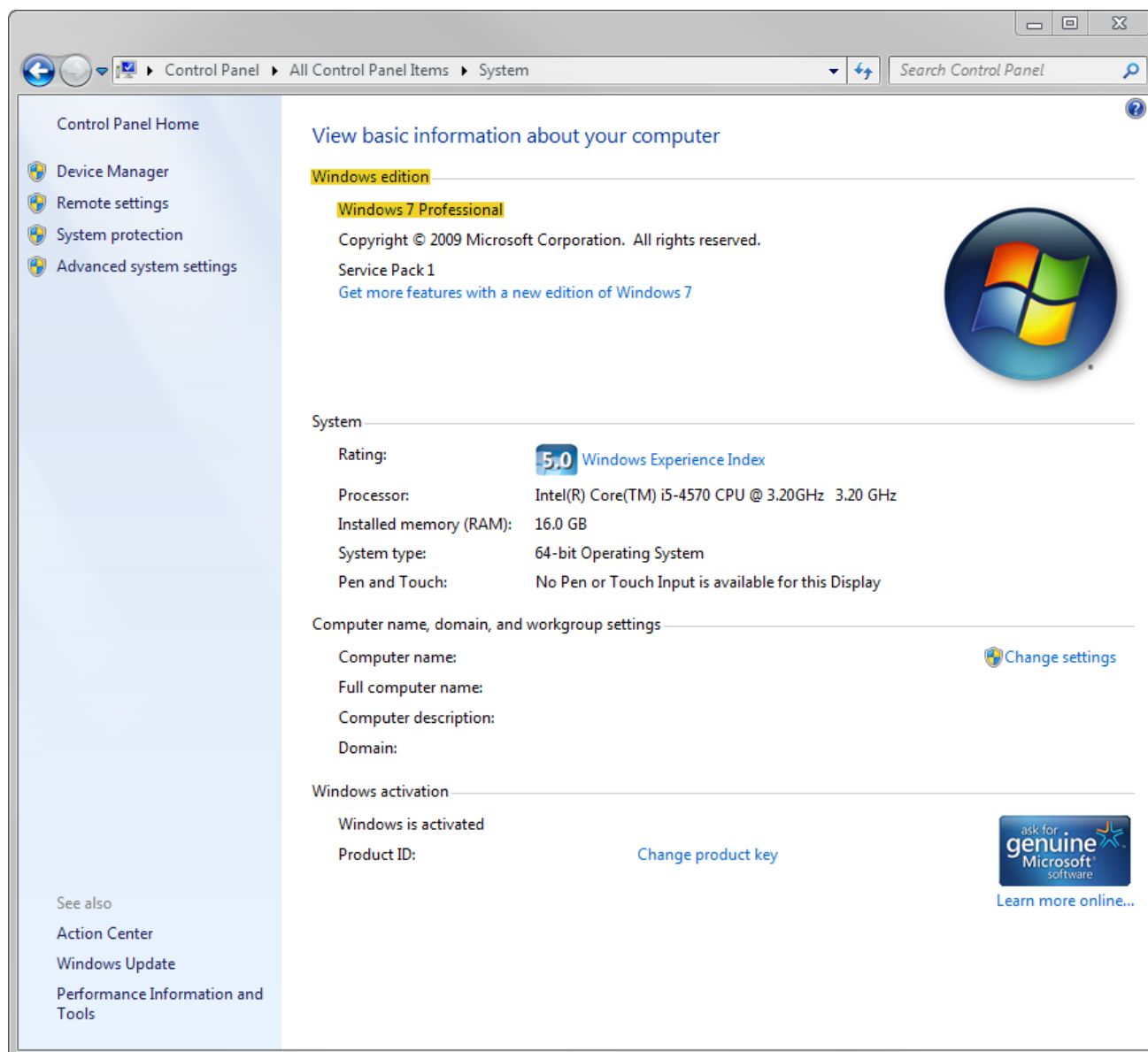


Figure 13. Windows version details

Internet browser

Internet Explorer

To find the Internet Explorer version click the **tools icon** , located on the top right of the toolbar, then click **About Internet Explorer**. See **Figure 14**. The version number will be displayed in an information popup. See areas in yellow in **Figure 15**.

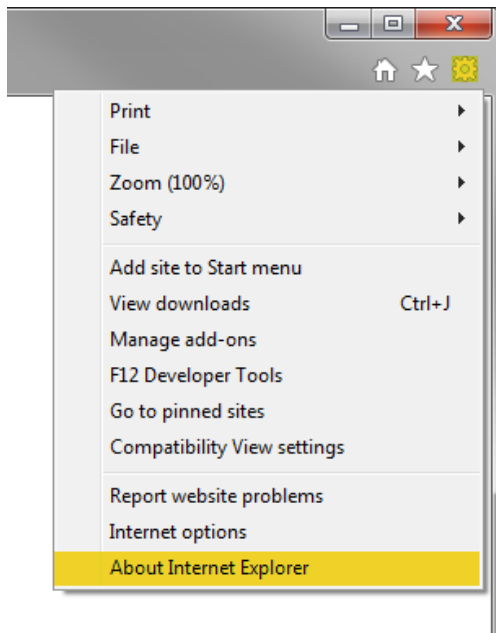


Figure 14. Internet Explorer tools.



Figure 15. Internet Explorer details.

Google Chrome

To find the Chrome version click the **tools icon** , located on the top right of the toolbar, hover over **Help** then click **About Google Chrome**. See **Figure 16**. This will open a new tab displaying the version number. See areas in yellow in **Figure 17**.

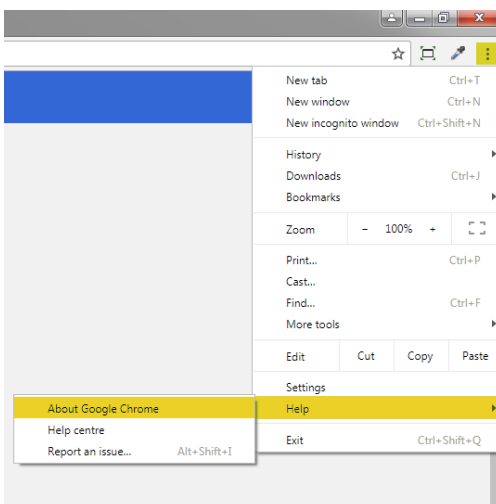


Figure 16. Google Chrome menu

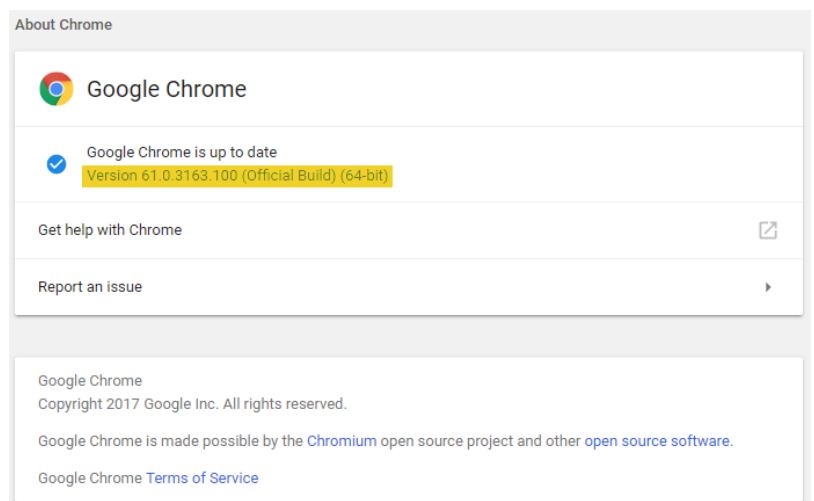


Figure 17. Google Chrome details

NASH certificate

Finding if the NASH is current: clicking the **Start button** , type certmgr.msc into the search box at the bottom of the page and press Enter.

Under **Certificates - Current User** expand the **Personal** folder and click the **Certificates** folder. Certificates installed will be displayed in the right hand pane. The general NASH cert installed it begin with **800123456432**. See **Figure 18**. To check if the expiry date is valid **double click on the certificate**, see **Figure 19**. If it isn't then a new NASH Certificate may need to be ordered.

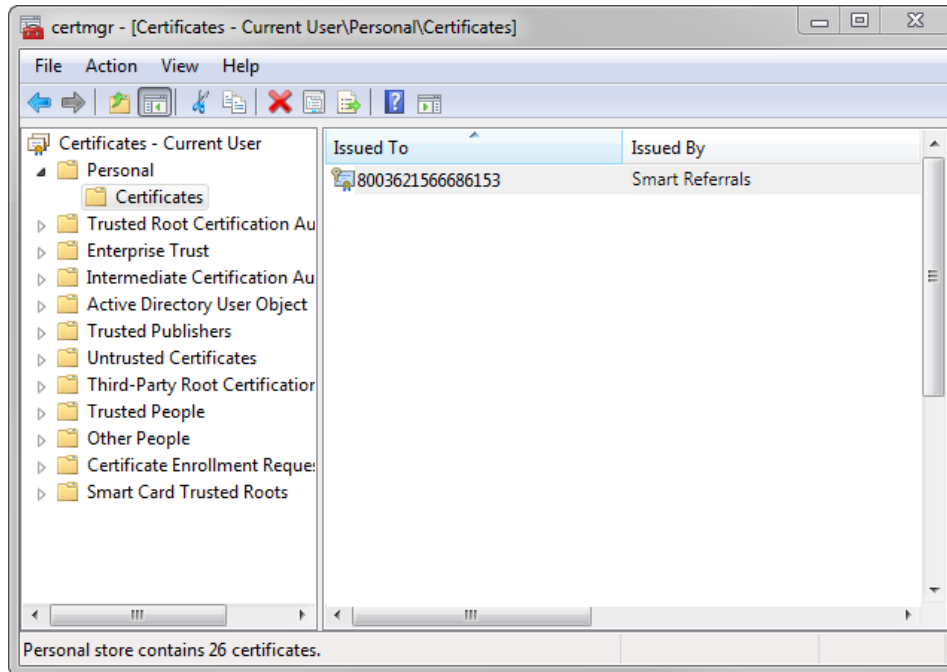


Figure 18. Certificate manager.

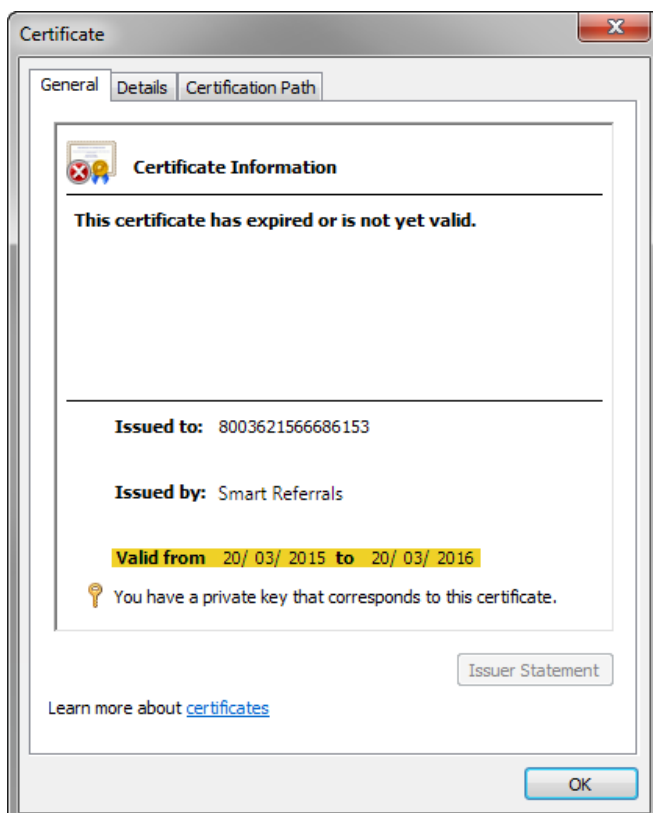


Figure 19. Test NASH certificate expiry date information

Microsoft .NET version

To check if your .NET version is 4.5 or above click the **Start button** > **Control Panel** > **Programs and Features**. The version number is displayed beside the program name, see the area in yellow in **Figure 20**.

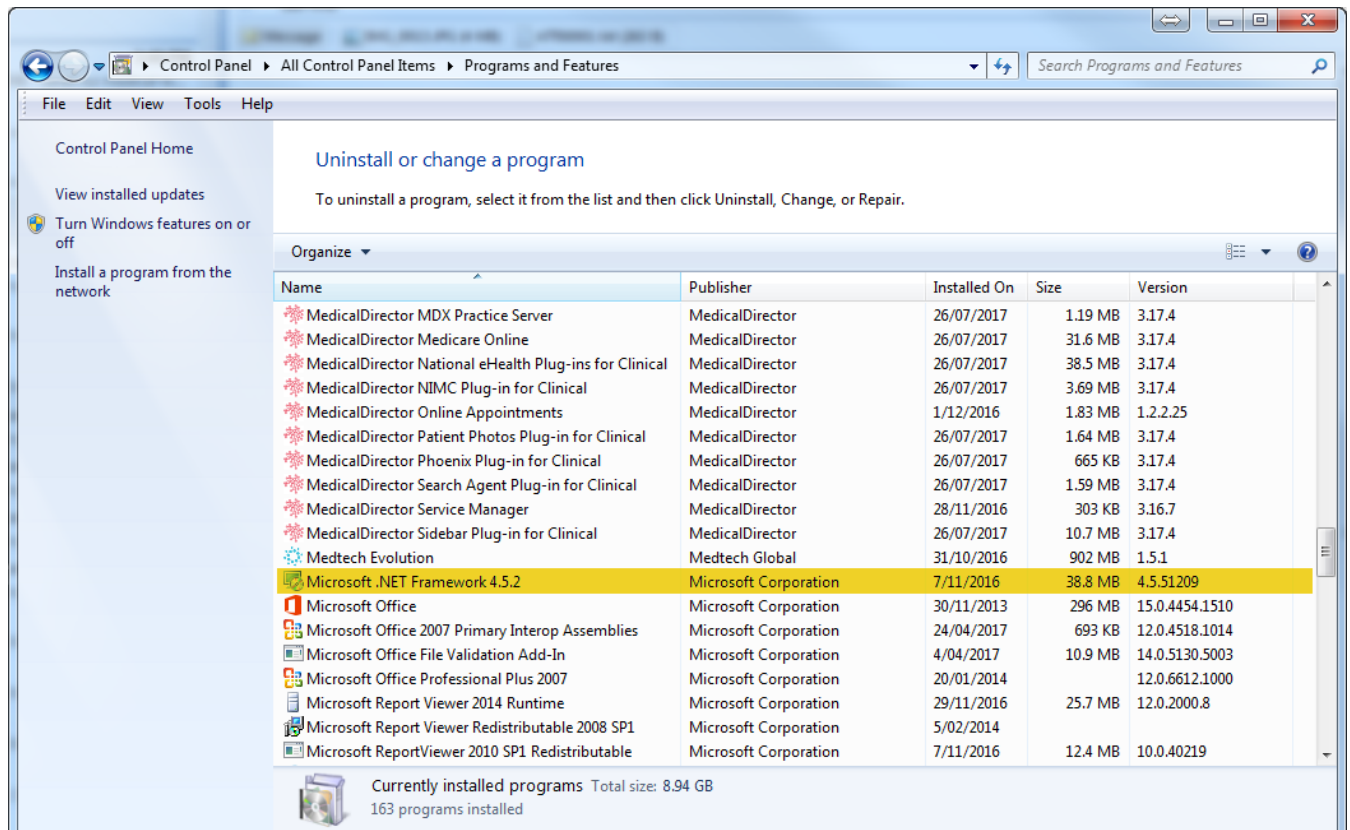


Figure 20. Microsoft .NET version

Best Practice database password

In order for Smart Referrals to operate it has to talk to BP and authenticate with it. The way it does this is through inputting the BP Database password in a setup screen when the program is downloaded onto each PC.

This password is usually setup on installation of BP by either your IT person or through direction from BP itself. If you do not have a record of this check to see that this was actually inputted in the first place. If it hasn't you can set it up yourself, but please keep a record of it in a safe place.

If either you or your IT provider cannot remember what this password is, then you will need to ring BP and get it reset. This is an easy process and BP will direct you through it.

To see if you have a BP password already setup, undertake the following instructions (see Figure 21):

- Under Setup choose Configuration
- This will display options on your left – choose Database
- When this option has loaded choose Database Browser
 - If there is a password present it will show and you may need to reset it via BP if you cannot remember it
 - If it is blank then you are able to fill this in and create a password.

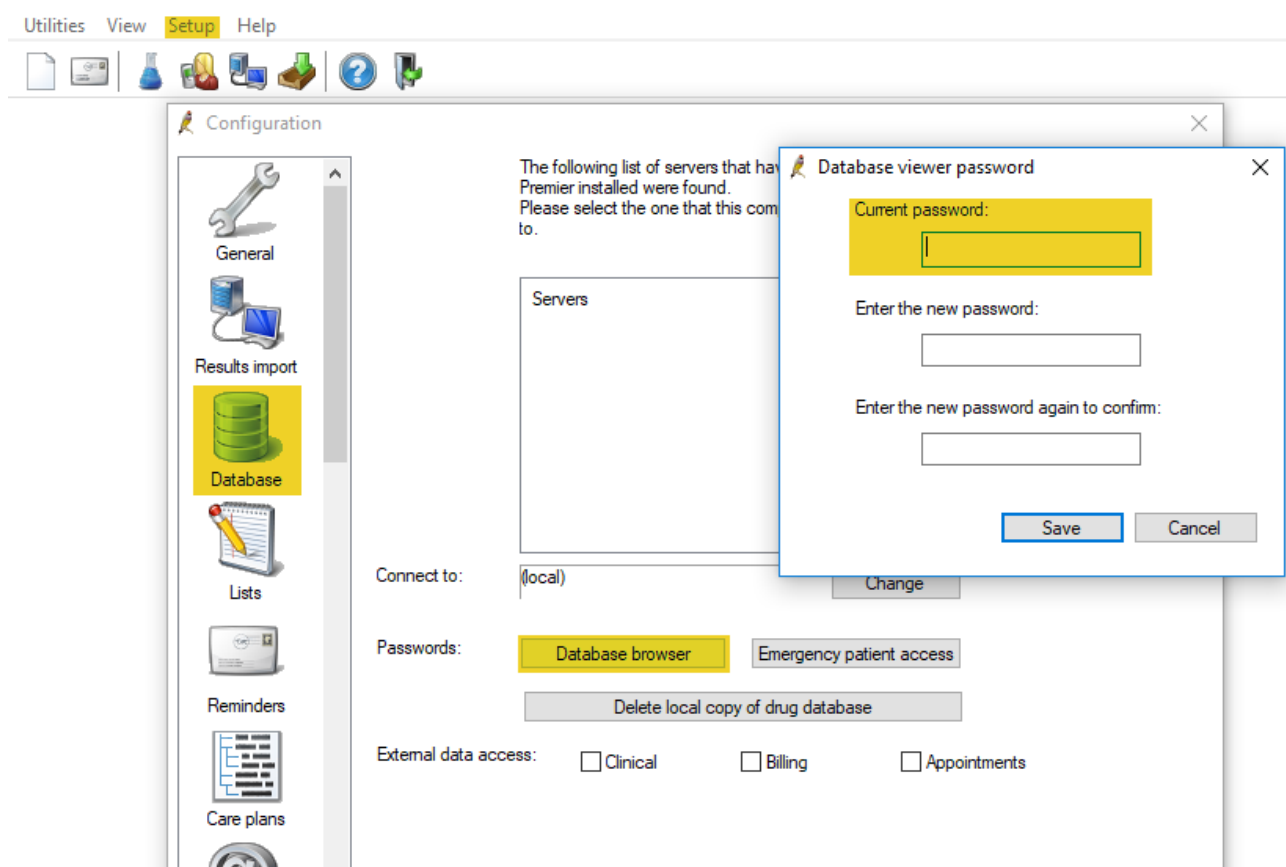


Figure 21. Finding your Best Practice database password

Names of GPs who will use Smart Referrals

Please list the names of the GPs at your practice who will use Smart Referrals

[illegible]

Practice PC details

If PCs at your practice have varying specifications please enter the details below. Please note that the minimum requirements to use Smart Referrals are: Windows 7 or above, Internet Explorer 11 or above or Google Chrome.

[illegible]