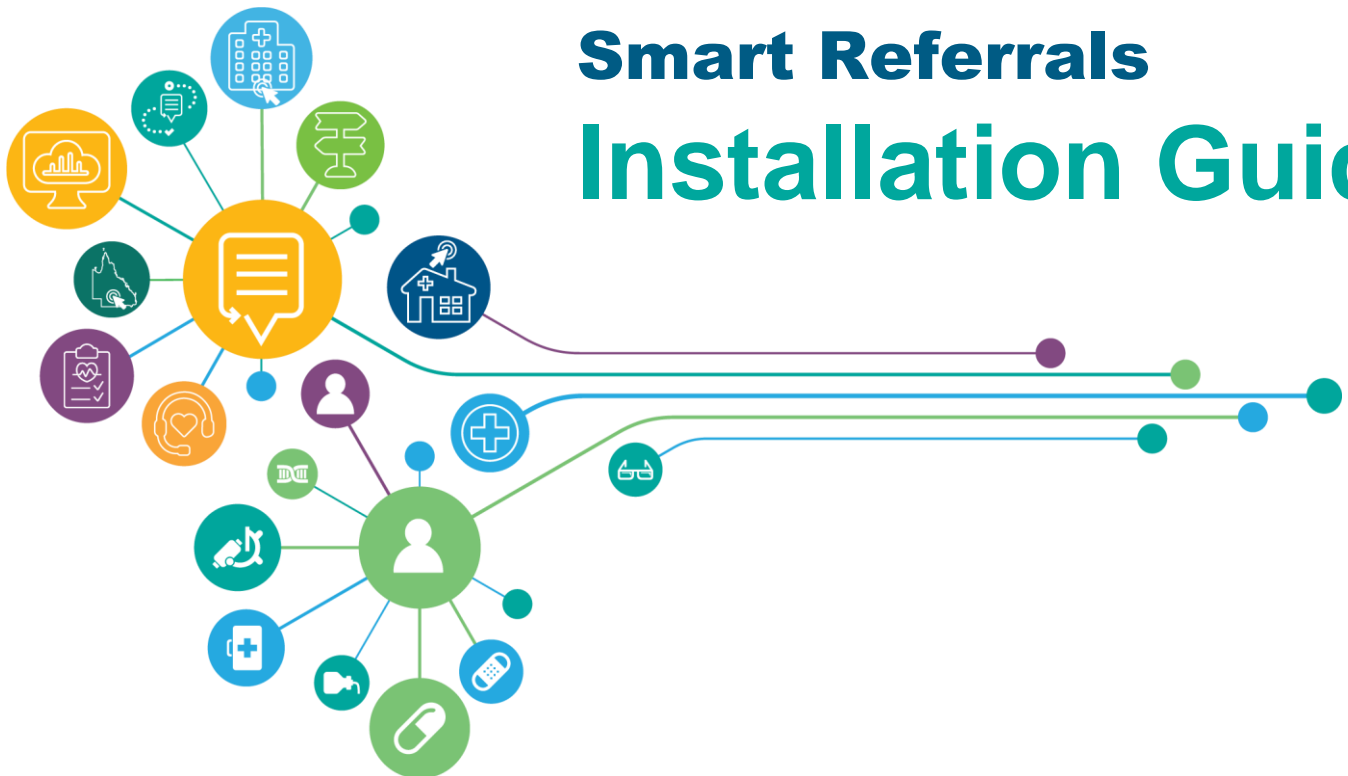




Smart Referrals Installation Guide





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Introduction

This guide provides the step by step instructions that should be followed to ensure the successful install of Smart Referrals.

Best Practice

System requirements

Required

Details/version

Best Practice Clinical Software	Lava or higher
Windows	7 or higher
Internet Explorer	11 or Enterprise
NASH certificate	CD is available at practice
.NET	4.5.2

Prerequisites

The following are needed at the time of install:

- Best Practice site ID
- Best Practice database password
- Practice HPI-O number
- Full administrative rights
- Anti-virus allowing installs
- Ports open

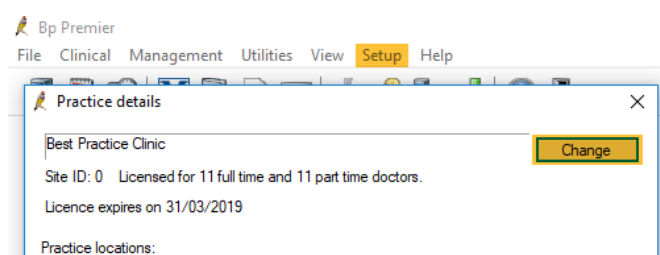
Best Practice installation

IMPORTANT NOTE: All computers requiring Smart Referral installation need to be logged in at the time of install with full administrative privileges. Installation will error if not provided. Do not proceed if this is not available.

Check Best Practice details

Your practice name will be auto populated in Smart Referrals, therefore it is important to check your practice name is correct in Best Practice.

1. Go to Setup > Practice details in the Best Practice toolbar.
2. To edit the practice name click Change. Amend the name if required and click Save. See Figure 1.



Download the installer

Figure 1: Change practice name

Download the Smart Referrals installer from <https://gpsr-client.sentreferral.com/adminsetup.exe> Internet Explorer will open the view downloads window, click Run to begin the install, see Figure 2.

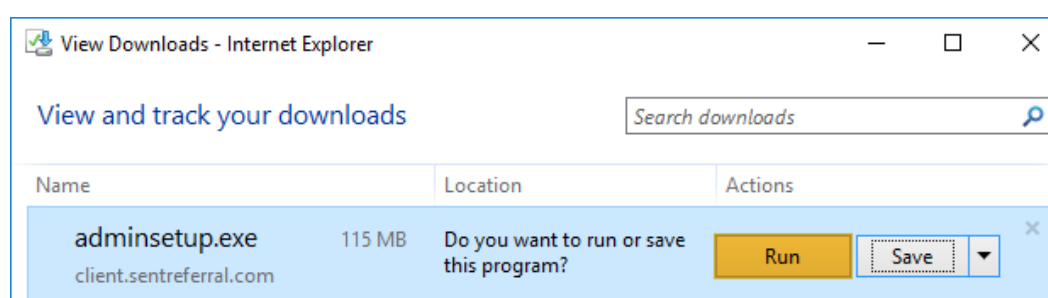




Figure 2: Run the Smart Referrals install file



Smart Referrals

When the install is complete, a End User License Agreement is displayed (Figure 3). Ensure you read the agreement and click Accept to continue and set up your clinical software.

Configure Smart Referrals

Before a health check is run Smart Referrals must be configured to your clinical software. Select Best Practice from the list (shown in Figure 4), enter your details, and click Next to run the health check.

Smart Referrals

Select Clinical Software

CIS: Best Practice

Database server:

Database name:

Database user:

Database password:

Next

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Figure 4: Clinical software setup.

Health check

After install, a health check is run to ensure that your system meets the requirements for Smart Referrals.

If no health check results are displayed, your system meets requirements.

The health check results window details any unmet requirements, Figure 5. For more information use the health check log or support and information links in the footer.

The window can be closed while any issues are resolved.

DotNet version

If your DotNet version does not meet what is required, it will automatically update at the time of install. If this fails the health check, please check you have administrator rights. Contact your IT support for assistance.

Once your rights have been resolved, uninstall and re-install Smart Referrals.

Best Practice version

The Best Practice version installed is not supported, please contact your practice manager to discuss upgrading the software and re-open Smart Referrals to run the health check.

Internet Explorer

The Internet Explorer version installed is not supported, please contact your practice manager or IT support to update Internet Explorer to 11 or above. Once updated, re-open Smart Referrals to run the health check.

Certificate check

A valid NASH certificate could you be found. Please check you have your practice's NASH certificate installed, and that it is valid.

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Before you can access the Software, you must agree to these Terms and Conditions, which include the terms in the click box above.

2. Licence

2.1 Software Licence

Subject to the terms of this Agreement, the Licensor grants to User, and User

Decline Accept

Figure 3: End User License

Smart Referrals

Smart Referrals Client Health Check

DotNet Version	4.7.03056	✓
Clinical software supported	Best Practice 1.8.5.754	✓
Internet Explorer 11	Internet Explorer 11	✓
Certificate Check	Nash not found	✗

The following errors need to be resolved:

Nash (2) - A valid NASH certificate is required but could not be found.

Next

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Smart Referrals

When any issues have been resolved, re-open the Smart Referrals application to run the health check. Smart Referrals will open in the bottom right on your desktop, see Figure 6.

To change the Best Practice database setup, click menu icon > Setup, (Figure 7), to open the clinical software configuration window.

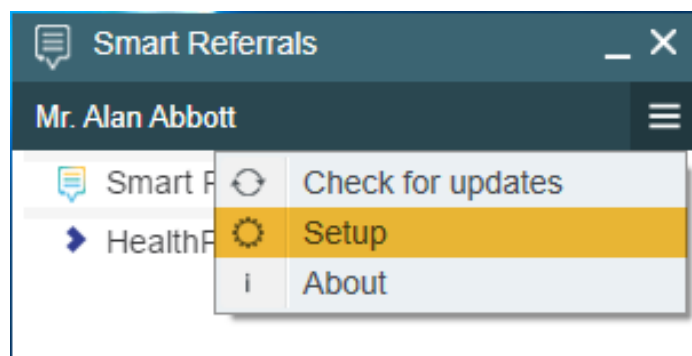


Figure 7: Access Smart Referrals setup.

Pin Smart Referrals to taskbar

If you would like to pin Smart Referrals to your taskbar:

1. Right click on the desktop icon
2. Click Pin to taskbar, see Figure 8

The icon will be added to your taskbar and can be used to access Smart Referrals, see Figure 9



Figure 9: Smart Referrals pinned to the Windows taskbar.

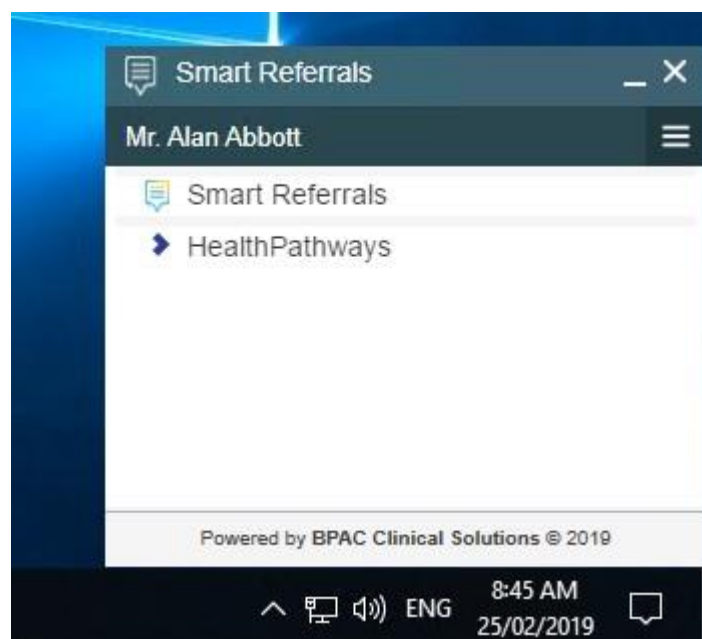


Figure 6: Smart Referrals on the desktop.

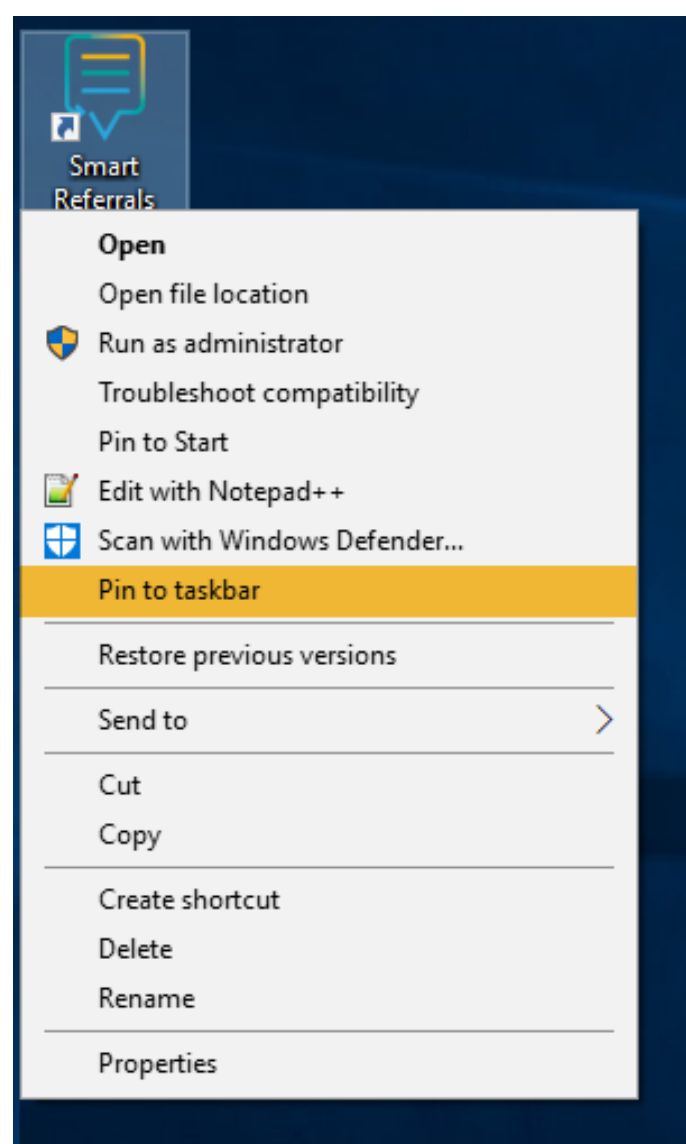


Figure 8: Pin Smart Referrals to the Windows taskbar.



Smart Referrals

Medical Director System requirements

Required

Details/version

Medical Director Clinical Software	3.17 or higher
Windows	7 or higher
Internet Explorer	11 or Enterprise
NASH certificate	CD is available at practice
.NET	4.5.2

Prerequisites

The following are needed at the time of install:

- Medical Director site ID
- Practice HPI-O number
- Full administrative rights
- Anti-virus allowing installs
- Ports open

Medical Director installation



IMPORTANT NOTE: All computers requiring Smart Referral installation need to be logged in at the time of install with full administrative privileges. Installation will error if not provided. Do not proceed if this is not available.

Check Medical Director details

Your practice name will be auto populated in Smart Referrals, therefore it is important to check your practice name is correct in Medical Director.

1. Go to Tools > Options > Practice in the Medical Director toolbar to check your name is correct.
2. To edit your practice name select Users > Setup users.
3. Click Change license. Amend the name if required and click Save, see Figure 10.

The screenshot shows the 'Licence Details' dialog box in Medical Director. At the top, there are buttons for 'Change Licence' and 'Print Details'. The 'Practice Details' section contains 'Practice Id: 888888' and 'Practice Name: MedicalDirector Samples Database'. The 'Product Name' is set to 'Medical Director'. The 'Licence Key' field is highlighted in green, and a 'Validate' button is to its right. Below this, a section titled 'Medical Director Licence Details' displays a message: 'This licence key is valid.' Underneath is a table with columns 'Product', 'Expiry', and 'Users'. At the bottom right are 'Save' and 'Cancel' buttons.



Smart Referrals

Figure 10: Change practice name in Medical Director.



Download the installer

Note: ensure Medical Director is closed before beginning install.

Download the Smart Referrals installer from <https://gpsr-client.sentreferral.com/adminsetup.exe> Internet Explorer will open the view downloads window, click Run to begin the install, see Figure 11.

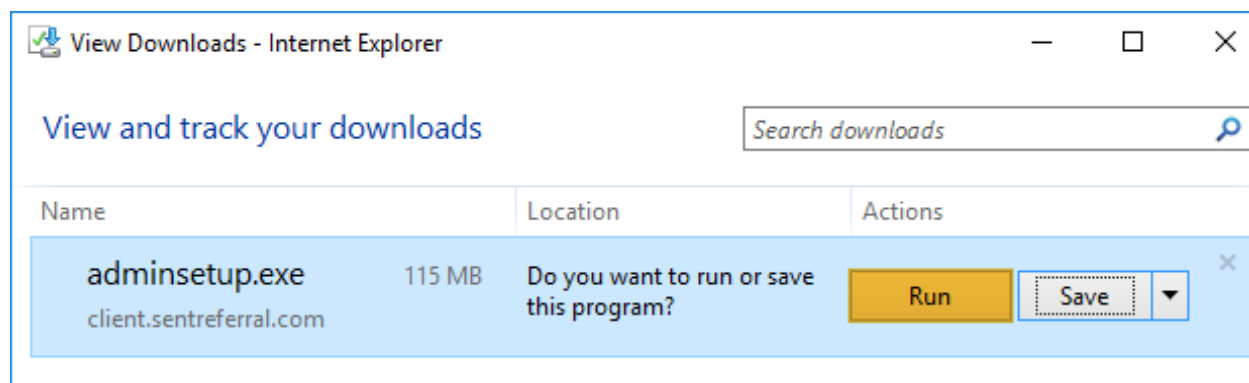
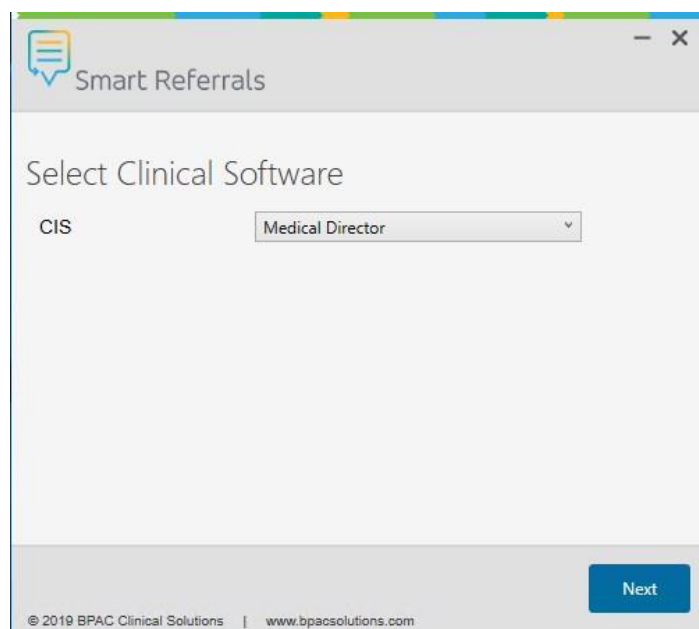


Figure 11: Run the Smart Referrals install file

When the install is complete, a End User Licence Agreement is displayed (Figure 12). Ensure you read the agreement and click Accept to continue and set up your clinical software.

Configure Smart Referrals

Before a health check is run Smart Referrals must be configured to your clinical software. Select Medical Director from the list (shown in Figure 13), and click Next to run the health check





Health check

After install, a health check is run to ensure that your system meets the requirements for Smart Referrals.

If no health check results are displayed, your system meets requirements.

The health check results window details any unmet requirements, Figure 14. For more information use the health check log or support and information links in the footer.

The window can be closed while any issues are resolved.

DotNet version

If your DotNet version does not meet what is required, it will automatically update at the time of install. If this fails the health check, please check you have administrator rights. Contact your IT support for assistance.

Once your rights have been resolved, uninstall and re-install Smart Referrals.

Medical Director version

The Medical Director version installed is not supported, please contact your practice manager to discuss upgrading the software and re-open Smart Referrals to run the health check.

Internet Explorer

The Internet Explorer version installed is not supported, please contact your practice manager or IT support to update Internet Explorer to 11 or above. Once updated, re-open Smart Referrals to run the health check.

Certificate check

A valid NASH certificate could you be found. Please check you have your practice's NASH certificate installed, and that it is valid.

When any issues have been resolved, re-open the Smart Referrals application to run the health check. Smart Referrals will open in the bottom right on your desktop, see Figure 5.

Adding the widget to Medical Director

When the install is complete Smart Referrals should automatically appear in the Medical Director sidebar (Figure 15).

If it is not in the sidebar, it will need to be added manually. To do this:

1. Click the sidebar settings icon > Add/Remove Widgets (Figure 16).
2. Locate the Smart Referrals widget and click the + icon to add it to your sidebar (Figure 17).
3. Close the Add/Remove Widgets window

Note: if the Smart Referrals widget cannot be found in the Add/Remove Widgets window, restart Medical Director and try again.

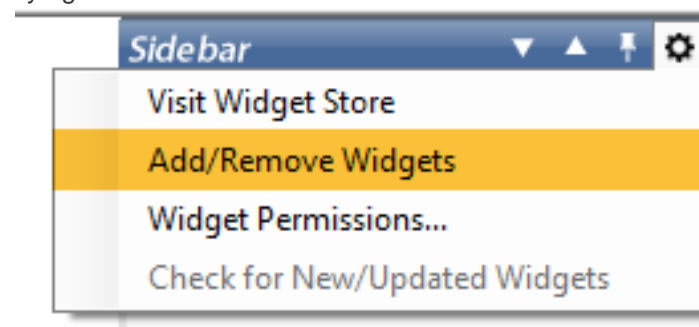


Figure 16: Add/Remove Widgets in Medical Director.

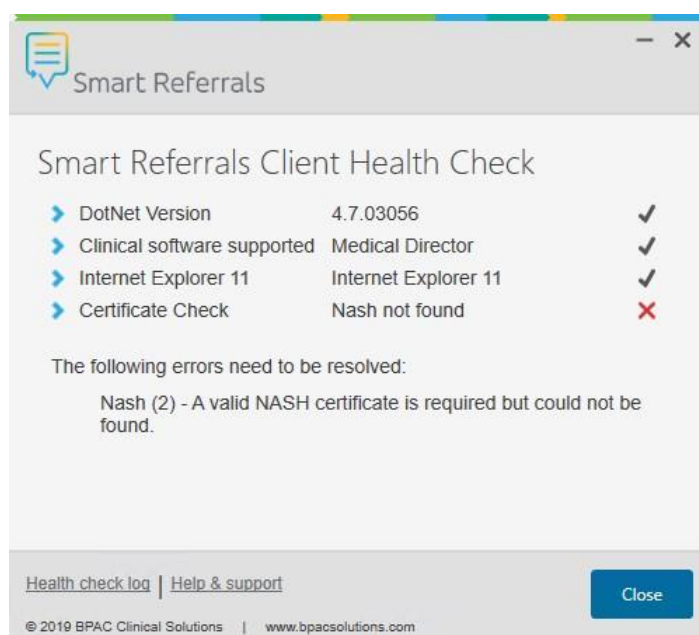


Figure 14: Failure during the health check.

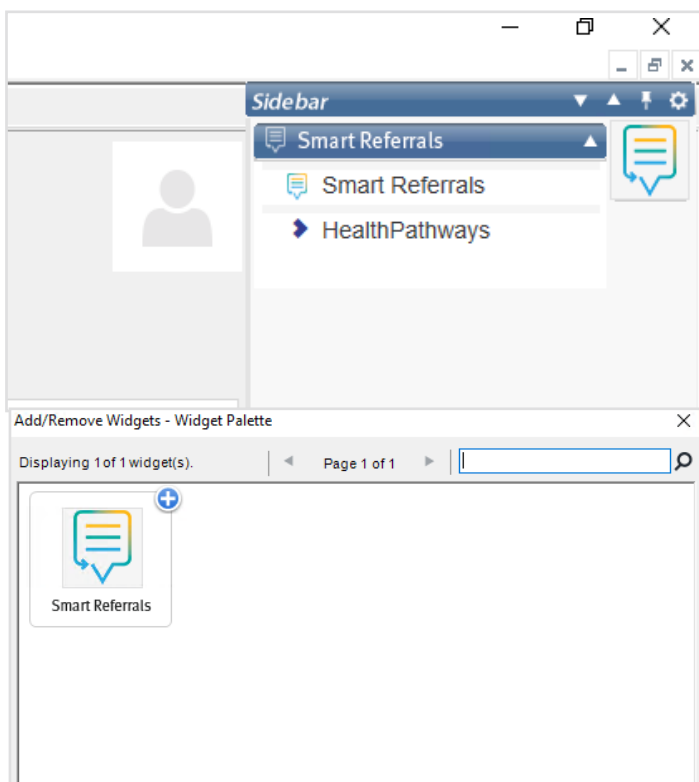


Figure 17: Smart Referrals in the Medical Director sidebar.