Bp Allied v4 to v6 Upgrade Process

This document contains details of what needs to be considered prior to an upgrade of myPractice V4 to Bp Allied V6. Please feel free to call or email our support team to discuss any of the content of this document.

Contents

Upgrade Assessment

Due to some differences in the database configurations of version 4 databases we would like the opportunity to run an assessment of your database prior to the upgrade. This allows us to review the differences in the configuration and more accurately determine if we need to intervene in the upgrade process as well as estimate the time it will take to upgrade. This process will also compare this computers hardware profile against our recommended System Requirements. We may also request that the assessment be run on any other computers to ensure that their hardware is of sufficient specification.

Please call Bp Allied Support on 1300 401 111 or 0800 401 111 to arrange a time to have your set-up assessed for upgrading. The outcome of this will determine if we need to assist with the upgrade process.

Considerations prior to upgrade

Operating System

All computers must be a minimum of Windows 7 SP2 as the .NET framework 4.6 must be able to be installed. This means that we are unable to upgrade any computers running Windows XP or Windows Vista. However, please be aware that Windows 7 has only minimum support from Microsoft and will come to end of life in the near future.

All computers to be upgraded MUST be running the latest Windows Updates. Upgrades may fail if these are not up to date.

Administrative access is required for all computers to enable the upgrade to take place.

PC/Server requirements: The Bp Allied recommended **minimum** system requirements for a **single user PC** is:

- 8GB Ram
- 50GB free disk space
- Gen 6 or later i7 Desktop Quad core processor or equivalent AMD Processor.
- For multi-user or Remote Desktop requirements please review the system requirements here and contact Bp Allied Support for additional information.

Major Enhancements

Bp SMS

This option is available from Best Practice and can be signed up for by calling the Bp Sales team on 1300 401 111 or 0800 401 111. They offer a premium service and dedicated send from numbers for Australian customers. More details on how to set this up can be found in the here.

SMS Central

SMS Central is also available and can be signed up for via the link in System > Options > Reminders > SMS Reminders **after** the upgrade. More details on how to set this up can be found in the documentation.

Xero Integration

The Xero Export report allows BpAllied to connect directly to your Xero account via the Xero API and transfer Invoices, Payments and Refunds that have been created in BpAllied into Xero. The transfer of these is dependent on the transfer of basic client and Products and Services information. The Xero API transfer can be used by both New Zealand and Australian practices.

There are a number of limitations to the Xero Integration. They can be found here.

MYOB Integration

The MYOB Export is enabled via an API that allows Bp Allied to talk directly to MYOB. It can connect to AccountRight installed locally or to the Cloud version. If installed locally then the

MYOB Add-on Connector must be running. The documentation on this is all contained in the user documentation here and here.

Permissions

- All Clients will need a Primary Practitioner to be assigned
- Do you have any current permission restrictions in place, e.g. practitioners unable to invoice or run various reports?
- If so, we will need to compare these to the default roles to see if any new roles need to be created.
- Any specific permissions that are set against a user will not be taken into account as part of the upgrade process. They will need to be manually updated after the upgrade. Please discuss this with us so that we can assist.
- Do you want to set your permissions differently than how they will be set during the upgrade process?
- Review the standard roles and permissions in the appendix
- Review the Permissions upgrade process

Argus Secure Messaging

The Argus API has been updated to be compatible with Argus V6 and V7. Additional features include:

- Receiving RTF and PDF documents into Bp Allied as an Incoming Message and
- One click update of all Referrers Argus V5 email addresses into the new Argus identifier.

Argus V5 is **not** compatible with Bp Allied V6.

Invoice and Letter Editor Email Forms

Invoice and Letter Editor Email forms have been updated to display client, third-party or referrer names and email addresses, as applicable. The client related to a Third Party invoice can now have that invoice emailed to them.

Claiming and Payment options

Tyro Eftpos & HealthPoint

Bp Allied has been integrated with both the Tyro Eftpos and HealthPoint. It uses the Tyro Terminal Adapter that is installed on the computer running Bp Allied and paired with the Tyro Eftpos terminal. Implementation of Tyro Eftpos does not mean that the Tyro HealthPoint function needs to be implemented as well. We can cater for multiple Merchant ID's (MID) should some practitioners need to have a that is separate to the business MID one.

Signup for both Eftpos and HealthPoint is done directly with Tyro.

Please note that there are no plans to integrate with Tyro EasyClaim.

Medicare

There are two Medicare options that have been integrated into Bp Allied: Bulk Billing and Medicare Online Patient Claiming. Bp Allied will issue a **new** Minor ID for each practice that uses this service. Linked to this minor ID will be any practitioner's provider number that claims will be made for we well as the bank account that funds are to be paid into**. This means that a practice will be unable to run Medicare Easyclaim and the Bp Allied Medicare integrations at the same time because they will be running under two different Minor ID numbers**. A practitioner's provider ID can only be linked to one Minor ID.

The cost for this is 30 cents per claim. You will be billed monthly for your usage by Best Practice Software. Claims are paid for regardless of whether the claim is successfully paid or not.

Bulk Billing - allows an individual patient appointment that qualifies for Bulk Billing to be processed as part of creating an invoice for that appointment. The following information is required to be entered into Bp Allied to allow a claim to me made:

- Client first and last names
- Clients date of birth
- Client's Medicare card and reference number
- Valid referral, including Referrers name and provider number
- An appointment for a location that has a relevant provider number for the practitioner supplying the service
- Relevant Medicare Item Code attached to the appointment
- Amount charged for the service must equal the bulk bill amount

Patient Claims – allows the practice to claim back from relevant Medicare rebate on behalf of the patient. The rebates are processed via an overnight batch and usually transferred into a Client's bank account the following day. The following information is required to be entered into Bp Allied to allow a claim to me made:

- Client first and last names
- Clients date of birth
- Client's Medicare card and reference number
- Valid referral, including Referrers name and provider number

- An appointment for a location that has a relevant provider number for the practitioner supplying the service
- Relevant Medicare Item Code attached to the appointment
- The client must pay the account in full prior to the claim being made
- The client's bank account must be registered with Medicare

DVA / VAA

Bp Allied is integrated with the DVA Veterans Affairs Allied system and allows an individual patient appointment that qualifies for VAA funding to be processed. The following information is required to be entered into Bp Allied to allow a claim to me made:

- Client first and last names
- Clients date of birth
- Client's Veterans Affairs number
- Valid referral, including Referrers name and provider number
- An appointment for a location that has a relevant provider number for the practitioner supplying the service
- Relevant VAA Item Code attached to the appointment
- Amount charged for the service must equal the funding amount

Setting up Medicare Online Claiming

The process of setting up Medicare Online Claiming will take 3 to 4 weeks once the appropriate paperwork has been submitted to Medicare. Please contact the Bp Allied Sales team to start this process rolling.

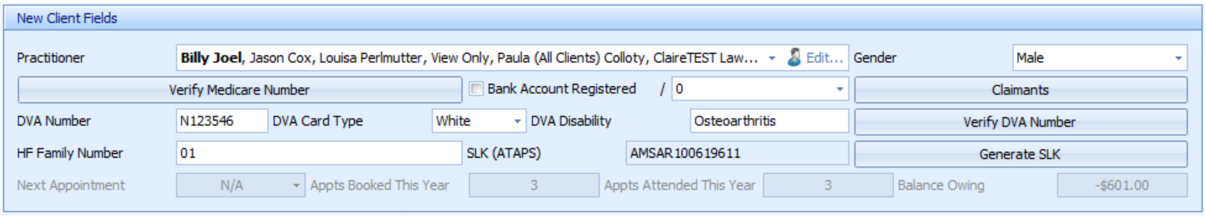
Other Changes

Google Sync

- The tokens that allow this to happen are now stored in the database
- All Practitioner Calendars that sync will need to have their Access Code updated after the upgrade
- To do this you will need each practitioner's Bp Allied login and Gmail login and password details

Client Details Layout Changes

There are several new fields available in the Client Details Layout due to the enhancements to the Medicare Online Claiming and Tyro HealthPoint. As we don't know whether you have customised your layout or not, the upgrade places these new fields at the bottom of the front page of the client layout (similar to those displayed below). You will need to move these into place. There is a video that will have a link from this section of the client layout to show you how to do this.



The main new fields available are:

- HF Family Number
- Verify Medicare and Claimants button
- DVA Number, Verify DVA Number, DVA Card Type & DVA Disability

Invoicing Process Changes

This area of the software changes significantly between version 4 and 6 due to the implementation of Medicare Online Claiming and Tyro Eftpos. Please review the details below to become familiar with the changes.

1. Invoices now have statuses. This means that an Invoice must not have a payment attached and be in the draft status to make a change to it. Please review the documentation on Editing a Paid Invoice or review the Masterclass video.
2. There is no automated payment creation. These are created manually.
3. Payments can no longer be deleted if they are incorrect but must be refunded.
4. Partial payments can be made and partial refunds can also be done.

Invoice Template Changes

If using a customised invoice template please liaise with Bp Allied Support to get new copies of these as they are now able to display multiple payment types.

Reports

NDIS Report - This has been updated to include recent changes from 1 July 2018.

Custom Reports - Please let us know if you have any custom reports so that we can pre-test these to ensure they will work in the new system.

Reset layouts – any saved report layouts will be reset as part of this process to avoid any incompatibilities between the versions.

ATAPS

The ATAPS program has been disabled and has been replaced by a program called Primary Mental Health Care Minimum Data Set (PMHC-MDS). Due to the significant development required for us to upgrade from ATAPS to this new program and the very low requirement for it, it was decided not to update our ATAPS module.

Invoice numbering per Location

If this is turned on, then the Refund number will also need to be set.

Other changes

For details of other small changes that have taken place, they are details in the What's new in version 5 documentation here and in the version 6 documentation here.

Pre-upgrade checklist

This is a checklist to ensure the following items have been considered and requested from Best Practice, if required.

Updated function	Used by customer	Additional information	Complete
Bp Allied Upgrade Tool run to confirm database schema		Run by Bp Allied support on or before the day of upgrade.	
All computers comply with new system requirements		Windows XP, Vista and Win 7 prior to SP2 are not supported. Review system requirements	
Confirm computer set-up configuration with Bp Allied support		• Single Computer • Single database shared by multiple computers (direct connection) • Fully Hosted • Partially Hosted (no recreate required?) • Combination Fully and Partially Hosted • One or more computers syncing to your own server	
Customised Invoice Templates		To be updated by Bp Allied support and supply to the client	
Customised Client Layout		Review video on how to update	
Custom Reports			
Google Sync		Access codes to be reset	
Invoice numbering per location		Refund to be set	
Permissions: • Defaults ok? • Is "All Practitioners can view/edit all clients" turned on? • Do all clients have a primary practitioner assigned?			
Tyro - Eftpos • Which computer to pair to Tyro		Does the customer have their Merchant ID, Terminal ID and Terminal Admin password?	

Tyro – HealthPoint Claiming • Which health funds?		Do we need to provide a customised Quote Template? Health Fund Identifying numbers and digits need to be given to them?	
Medicare • Customer to contact Bp Allied Sales to sign up		BpA Support to provide certificate once signed up	
Argus Secure Messaging		Needs to be at least Argus V6	
Bp SMS • Customer to contact Bp Allied Sales to sign up			
Invoicing Process changes		Review the documentation Editing a Paid Invoice, create a refund, create Partial payments or partial refunds. Or, review the Masterclass video.	
Xero Integration		Review the documentation here	
MYOB Integration		Review the documentation here	

What happens during the upgrade?

As well as changes to the user interface, there is an update to the database configuration during this process. This means that the upgrade process MUST happen in a particular way.

- All computers **must** be upgraded at the same time. Computers cannot be on different master versions e.g. some on version 4 and some on version 6.
- The computer that is running as the "server" or "master" database must be upgraded first. Bp Allied cannot be used on any other computers during this process.
- All other computers will be upgraded after the "server" is completed.
- You will need to allow sufficient time for ALL computers to be upgraded. Once started, all computers must be upgraded.
- Ensure that you have logins with Administrative access for all computers.
- Because all upgrades are conducted via the internet, having all computers in the office and accessible to the best internet available is advisable. Poor internet quality will affect how long the upgrade process takes.

The upgrade process includes taking a backup of your database. You can however take your own backup using the option in Options > Backup and store this backup in a known location.

Permissions Upgrade Process

As the upgrade is an automated process, it makes the following series of assumptions about the permissions settings in the new database:

- Role permissions are set based on the new Bp Allied default roles. Whilst there are differences in the access to things such as reports and invoicing etc, the most significant difference relates to the Client information displayed. Please see the Appendix for details.
- Apply the primary practitioner to each client as per the current V4 client table.

A role is set for each user based on the following settings in V4:

- **Admin** - automatically set as System Administrator and has access to all functions in MP. This cannot be changed, apart from disabling viewing some Client information. This can be changed at any time by anyone with System Administrator rights.
- Practitioner -
    - If the settings in Options > Client Details > All Practitioners can view\edit all Client Details is ticked, then all practitioners set to the role **Practitioner ALL Clients**
    - If the settings in Options > Client Details > All Practitioners can view\edit all Client Details is **not** ticked, then all practitioners set to the role **Practitioner OWN Clients**
- **Receptionist** – automatically set to Reception

Any specific permissions that are set against a user will not be taken into account as part of the process. They will need to be manually updated after the upgrade. Please discuss this with us so we can assist.

This is ONLY carried out on the server and updates the Client Access table. If there are syncing computers then their tables will be populated once their database is updated / recreated.

Once the client access table is updated then the upgrade will assign the Primary practitioner against a client.

How to upgrade?

How you upgrade will depend on the type of Bp Allied installation you have. Below are a series of install options to be selected from to follow. The options are:

- Single Computer
- Single database shared by multiple computers (direct connection)
- Fully Hosted
- Partially Hosted
- Combination Fully and Partially Hosted
- One or more computers syncing to your own server

Single Computer

Please call Bp Allied Support on 1300 401 111 or 0800 401 111 to have a database assessment carried out. If it is determined from the upgrade assessment that we do not need to assist with this process, then you can upgrade your computer to version 6 without our help. If our help is required, then this will need to be booked in with the Bp Allied Support team.

Before the day:

1. Have the database assessment carried out
2. Have Bp Allied Support put the upgrade trigger file (client.wyc in place if Bp Allied support are not helping with this upgrade.

On the day, the following will need to occur:

1. Follow the instructions in Appendix: Using Check for Updates to Upgrade.
2. Follow the instructions in What to complete immediately after upgrading

Approximate time for upgrade: 1 hour

Single database shared by multiple computers

Please call Bp Allied Support on 1300 401 111 or 0800 401 111 to have a database assessment carried out. If it is determined from the upgrade assessment that we do not need to assist with this process, then you can upgrade your computer to version 6 without our help. If our help is required, then this will need to be booked in with the Bp Allied Support team.

Before the day:

1. Have the database assessment carried out
2. Have Bp Allied Support put the upgrade trigger file (client.wyc) in place if Bp Allied support are not helping with this upgrade.

On the day, the following will need to occur:

1. Allow sufficient time to perform the upgrades on all computers. Once started, all computers must be upgraded.
2. Ensure that you have reviewed
3. Ensure that ALL information is saved and close Bp Allied on all computers
4. From this point, Bp Allied cannot be used on any computer until after it has been upgraded.
5. On the “server” or computer that is running the master database, follow the instructions in the Appendix: Using Check for Updates to Upgrade.
6. Once the “server” has been upgraded, open Bp Allied and confirm that the upgrade has worked as expected.
7. Upgrade each of the other computers running Bp Allied Appendix: Using Check for Updates to Upgrade. These can be updated simultaneously or consecutively but can’t be used until they have been upgraded.
8. Before anyone logs on, follow the instructions in What to complete immediately after upgrading

Approximate time for upgrade:

- Server: 1 hour
- Workstation: 10 - 15 minutes each

Fully Hosted

Please call Bp Allied Support on 1300 401 111 or 0800 401 111 to arrange a time to have your set-up upgraded as we will need to do this for you. You will not be able to access Bp Allied while this is taking place.

Before the day, support will need to:

1. Have the database assessment carried out on our server

On the day, the following will need to occur:

1. Ensure that no one is accessing myPractice / Bp Allied at the pre-arranged time.
2. Once this is done, Bp Allied Support will call you and let you know that the upgrade has been completed.

3. Before anyone logs on, follow the instructions in What to complete immediately after upgrading

Approximate time for upgrade: 1 – 3 hours

Partially Hosted (no recreate required?)

Please call Bp Allied Support on 1300 401 111 or 0800 401 111 to arrange a time to have your set-up upgraded.

Before the day, support will need to:

1. Have the database assessment carried out on our server

On the day, the following will need to occur:

1. Allow sufficient time to perform the upgrades on all computers. Once started, all computers must be upgraded.
2. Ensure that ALL syncing computers are sync'd and up to date.
3. Close Bp Allied on all computers
4. From this point, Bp Allied **cannot** be used on any computer until after it has been upgraded.
5. Call Bp Allied Support to let them know that you are ready to go. They will upgrade your database on our server
6. Once this is done, Bp Allied Support will call you, and the upgrade of the practice computers can begin. These can be updated simultaneously or consecutively but **cannot** be used until they have been upgraded.
7. Before anyone logs on, follow the instructions in What to complete immediately after upgrading

Approximate time for upgrade:

- Server: 1 hour
- Workstation: 1 - 3 hours per syncing computer depending on database size and internet speed

Combination Fully and Partially Hosted

Please call Bp Allied Support on 1300 401 111 or 0800 401 111 to arrange a time to have your set-up upgraded.

Before the day, support will need to:

2. Have the database assessment carried out on our server

On the day, the following will need to occur:

1. Allow sufficient time to perform the upgrades on all computers. Once started, all computers must be upgraded.
2. Ensure that ALL syncing computers are sync'd and up to date.
3. Close Bp Allied on all computers
4. From this point, Bp Allied cannot be used on any computer until after it has been upgraded.
5. Call Bp Allied Support to let them know that you are ready to go. They will upgrade your database on our server and the fully hosted clients.
6. Once this is done, Bp Allied Support will call you, and the upgrade of the practice computers can begin. These can be updated simultaneously or consecutively but **cannot** be used until they have been upgraded.
7. Before anyone logs on, follow the instructions in What to complete immediately after upgrading

Approximate time for upgrade:

- Server and Fully Hosted Clients: 1 – 1 ½ hours
- Workstation: 1 - 3 hours per syncing computer depending on database size and internet speed

One or more computers syncing to your own server

Please call Bp Allied Support on 1300 401 111 or 0800 401 111 to arrange a time to have your server upgraded.

Before the day,

- Confirm how the Bp Allied Support staff will access your server and test that the access works. Particularly important if you do not host the server yourself. Access to your server may need to be co-ordinated with a third party.

On the day, the following will need to occur:

1. Allow sufficient time to perform the upgrades on all computers. Once started, all computers must be upgraded.
2. Ensure that ALL syncing computers are sync'd and up to date.
3. Close Bp Allied on all computers
4. From this point, Bp Allied cannot be used on any computer until after it has been upgraded.
5. Call Bp Allied Support to let them know that you are ready to go. They will upgrade your database on our server
6. Once this is done, Bp Allied Support will call you, and the upgrade of the practice computers can begin. These can be updated simultaneously or consecutively but **cannot** be used until they have been upgraded.
7. Before anyone logs on, follow the instructions in <u>What to complete immediately after upgrading.</u>

Approximate time for upgrade:

- Server: 1 hour
- Workstation: 1 - 3 hours per syncing computer depending on database size and internet speed

What to complete immediately after upgrading

Support team to supply

1. Create and email customised Invoice Templates updates with instructions.
2. Are they implementing Health Point?
    a. If so, do we need to provide a customised Quote Template?
    b. What Health Fund Identifying numbers and digits need to be given to them?

Practice / Support team to carry out

1. Update Practice Name
    a. Go to System > Options > Practice Information and check that the Practice Name has been entered.
    b. This is now stored in the database and so once updated is available to all users after a refresh (or a Sync All).
2. Update to GST Rate
    a. Check the GST Rate in System > Options > Practice Information and check that is value is correct.
    b. This is now stored in the database and so once updated is available to all users after a refresh (or a Sync All).
3. Check Country Code
    a. Go into Options > Reminders > SMS Reminders and check that Country Code is displayed correctly.
    b. This is now stored in the database and so once updated is available to all users after a refresh (or a Sync All).
4. Reset Google Calendar Access Code
    a. Each calendar syncing will need the Access Code in System > Options > User Administration > Google Calendar reset as the Access Code is now stored in the database.
    b. To do this you will need each practitioner's Bp Allied login and Gmail login and password details.
    c. The update can be done on each practitioner's computer (logged in as the relevant practitioner). If syncing, then a SYNC ALL can be used to make the information available to all.
5. Copy updated Invoice Templates in place. Identify what computers will need this.
    a. The location to save the Invoice Templates on each computer can be found in System > Options > Invoices > Invoice Template Location.
6. Check Reminder templates are correct
    a. These are now found in Data Maintenance > Reminder Templates.
7. Move the new fields in your client layout into the correct location
    a. There are several new fields that are available in this version. These need to be moved.
    b. Click the Video link in the New Client Fields group to view how to move these fields into a new location.
    c. Or contact Bp Allied support for a standardised new client layout file that is already updated.

8. Review the roles and permissions and make changes if required. It may be useful to discuss this with the Bp Allied Support team before changing this yourself.
9. Upgrade Argus Secure Messaging if that is used.
   a. Argus V5 will not work with Bp Allied V6. This will need to be upgraded.

Process Changes

1. If reviewing Client Permissions in Client details you will be asked to assign a Primary Practitioner is there is none
2. All new clients made require a Primary Practitioner to be assigned at time of creation.
3. The invoicing process has changed. Review the notes in the Considerations prior to upgrade section.
4. Invoices now have statuses. Please review the documentation or the Masterclass video
5. There is no automated payment creation.

What can be done at a later stage?

There are several new integrations in version 6. They can be implemented at any time and do not need to be put in place as soon as the upgrade is done. In some situations, bedding down the new software maybe preferable prior to making these changes.

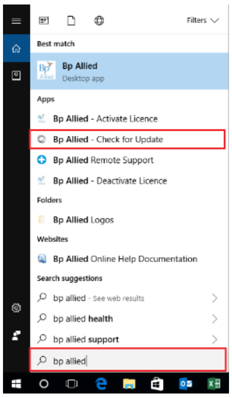
1. Change of SMS Provider
2. Medicare Online Claiming set-up (although this process can take up to 4 weeks so start early)
3. Tyro Eftpos and Healthpoint
4. MYOB or Xero integration
5. Medical Objects Secure Messaging

BpAllied
Software for your Allied Health Practice

Appendix: Using Check for Updates to Upgrade

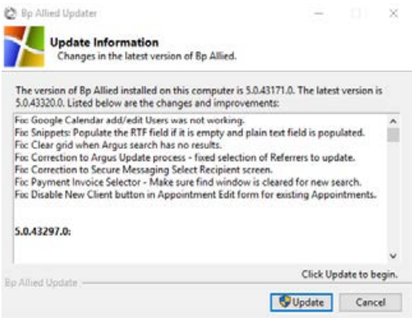
These instructions assume that the server (master computer) is upgraded first. These instructions MUST not be used for any sites that have syncing computers.

All other computers must close any running instances of BpAllied before this is run.



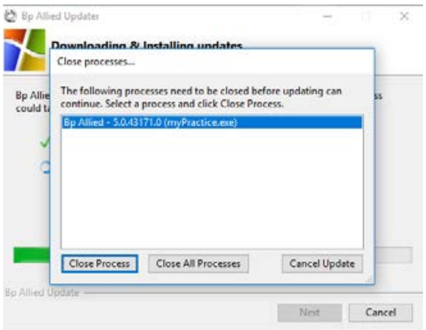
1. Close BpAllied
2. Copy and overwrite the client.wyc file with the V6 client.wyc file into C:\Program Files (x86)\myPractice folder.
3. Start the update by searching **Bp Allied Check for Update** in the windows search

The Bp Allied Updater will display. The latest available update will display in the Update Information screen along with the details of the changes in the update. In this example it displays a V5 update. For V6 the version number will be prefixed with a 6, e.g. 6.0.43344.0



4. Click **Update**
5. If the security on the computer asks if you want to make changes, click **Yes**
6. The download will start.

If Bp Allied is open, the following prompt will display.



7. Click Close Process
8. The upgrade should continue.

When the update is completed, the Update Successful screen will display.

9. Click **Finish.**

Appendix: Role Definitions

- **System Administrator** – has access to everything
- **Practitioner ALL Clients** – can see all Clients and all Client Details information
- **Practitioner Own Clients** – can see only the Clients that they are set as Primary Practitioner or secondary practitioner (view/edit consultation details are set). They will see that all that Clients Demographic and History information and only the Consultations that they are set as the practitioner for. This includes restriction in the details seen in reports and invoicing, except for Third Party Invoices. These are unable to be segregated.
- **Practitioner Own Clients All Consultations** – can see only the Clients that they are set as Primary Practitioner or secondary practitioner (view/edit consultation details are set). They will see that all that Clients Demographic and History information and all the Consultations regardless of which practitioner saw the client. This includes restriction in the details seen in reports and invoicing, except for Third Party Invoices. These are unable to be segregated.
- **Reception** – Only has access to a client's Demographic information.
- **Office Manager** – Only has view access to Client information

Appendix: Roles Permissions Matrix

ID	Permission	Reception	Practitioner - Own Clients	Office Manager	System Administrator	Practitioner - All Clients	Practitioner - Own Clients and All Consults
1000	Report - Appointments Not Invoiced	Y	N	Y	Y	N	N
1001	Report - Draft Invoices	Y	N	Y	Y	N	N
1002	Report - Appointment Summary Report	Y	N	Y	Y	N	N
1003	Report - Contact Details Export	Y	N	Y	Y	N	N
1004	Report - Item Sales Report	Y	N	Y	Y	N	N
1005	Report - Client Birthday List	Y	Y	Y	Y	Y	Y
1006	Report - Client Statistics	Y	N	Y	Y	N	N
1007	Report - Outstanding Balance	Y	N	Y	Y	N	N
1008	Report - Outstanding Invoices	Y	N	Y	Y	N	N
1009	Report - Banking	Y	N	Y	Y	N	N
1010	Report - Transaction Summary	Y	N	Y	Y	N	N
1011	Report - Referral Report	Y	Y	Y	Y	Y	Y
1012	Report - Full Client List	Y	Y	Y	Y	Y	Y
1013	Report - Client Analysis	Y	N	Y	Y	N	N
1014	Reports - Tyro Reconciliation Summary	Y	N	N	Y	N	N

1015	Reports - Tyro Reconciliation Detail	Y	N	N	Y	N	N
1016	Reports - Can see All Clients in All Permitted Reports	N	N	Y	Y	N	N
1017	Reports - ATAPS Reports (ATAPS Psychology Version only)	N	N	N	Y	N	N
1018	Report - Referrer Revenue Report	N	N	Y	Y	N	N
1022	Reports - Permitted to run Custom Reports	Y	N	Y	Y	N	N
1023	Report - Tasks Master	N	Y	N	Y	Y	Y
1025	Report - MYOB Exports	Y	N	Y	Y	N	N
1027	Report - Expenses Report	Y	N	Y	Y	N	N
1030	Report - Medicare Claim History	Y	N	N	Y	N	N
1031	Report - NDIS	Y	N	N	Y	N	N
2000	Invoicing - View	Y	Y	Y	Y	Y	Y
2001	Invoicing - Edit	Y	Y	Y	Y	Y	Y
2010	Invoicing - Can process Refunds	Y	N	Y	Y	N	N
2020	Invoicing – Can manually decline claims	N	N	Y	Y	N	N
3000	Referrers - View	Y	Y	Y	Y	Y	Y
3001	Referrers - Edit	Y	Y	Y	Y	Y	Y
3002	Referrers - Delete	Y	N	Y	Y	N	N
3010	Task Templates - View	Y	Y	Y	Y	Y	Y
3011	Task Templates - Edit	Y	Y	Y	Y	Y	Y

3020	Product & Services - View	Y	Y	Y	Y	Y	Y
3021	Products & Services - Edit	Y	N	Y	Y	N	N
4000	Clients - Can View All Client Names & Demographics	Y	N	Y	Y	Y	N
4001	Clients - Can Edit All Client Names & Demographics	Y	N	Y	Y	Y	N
4002	Clients - Can View All Client History & Consultations	N	N	Y	Y	Y	N
4003	Clients - Can Edit All Client History & Consultations	N	N	N	N	Y	N
4004	Clients - Can View Own Client Names & Demographics	N	Y	N	N	N	Y
4005	Clients - Can Edit Own Client Names & Demographics	N	Y	N	N	N	Y
4006	Clients - Can View Own Clients, History & All Consultations	N	N	N	N	N	Y
4007	Clients - Can Edit Own Clients, History & All Consultations	N	N	N	N	N	Y
4008	Clients - Can View Own Clients, History & Own Consultations Only	N	Y	N	N	N	N
4009	Clients - Can Edit Own Clients, History & Own Consultations Only	N	Y	N	N	N	N
4010	Clients - Can Edit Own Clients, History, Edit Own Consultations & View all Other Consultations	N	N	N	N	N	N
4019	Clients - No Access to Documents	N	N	N	N	N	N
4020	Clients - Can View List of Documents and Add	N	N	Y	N	N	N
4021	Clients - Can View List Open and Edit All Documents	Y	N	N	Y	Y	Y

4022	Clients - Can View List Open and Edit Own Documents	N	Y	N	N	N	N
4023	Clients - Can Delete Documents	N	Y	Y	Y	Y	Y
4030	Clients - Permitted to Delete Clients	N	N	Y	Y	N	N
5000	Can Manage Users and Permissions	N	N	N	Y	N	N
5001	Permitted to change Client Practitioner	Y	N	Y	Y	N	N
5002	Can Manage Access to Custom Reports	N	N	N	Y	N	N
5003	Can Allocate Client IDs in Options	N	N	Y	Y	N	N
5004	Can Manage Mailchimp in Options	N	N	Y	Y	N	N
5005	Can Manage ATAPS SLK Allocation	N	N	Y	Y	N	N
5006	Can Merge Clients	Y	N	Y	Y	N	N
5007	Can Import Clients	N	N	Y	Y	N	N
5008	Can set next Invoice and/or Payment Numbers	N	N	Y	Y	N	N
5009	Can set Practice Layout for Client Details	N	N	Y	Y	N	N
5010	Can Administer Calendar Access	Y	N	Y	Y	N	N
5011	Can view Audit Log	N	N	Y	Y	N	N
6000	Can Merge any data into Letters (in Client History and Consultation Notes)	Y	N	Y	Y	Y	N