

## Bp Allied v5 to v6 Upgrade Process

This document contains details of what needs to be considered prior to an upgrade of Bp Allied V5 to Bp Allied V6. Please feel free to call or email our support team to discuss any of the content of this document.

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## Considerations prior to upgrade

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### 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](#).

#### 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](#).

### Claiming and Payment options

#### Tyro - HealthPoint

Bp Allied has been integrated with [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.

There are no plans to integrate with Tyro EasyClaim.

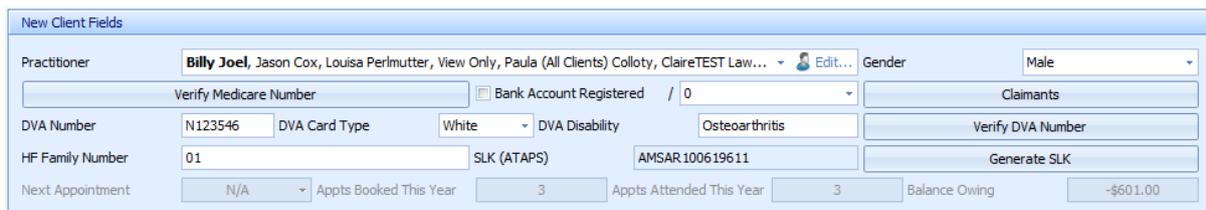
## Medicare & DVA Enhancements

There have been several enhancements to the Medicare and DVA functionality.

1. Saving a claimant to a Client Record – this allows a claimant to be saved against a [client](#) used whenever sending a Patient Claim for a client. There is additional validation for all clients under 21 years to remind the user to add a [claimant](#) if necessary.
2. [Resubmitting a claim](#) with multiple line items – if a claim includes more than one item, it allows an individual item on the claim to be resubmitted and adjusts the related invoice accordingly.
3. The ability to [manually decline](#) a claim that has is "stuck" and needs to be resubmitted but has not been rejected in the normal manner. There is a [permission](#) associated with allowing this option to be executed.
4. Adding a [DVA Card type](#) and Disability against a client – this enables either a White or Gold card type to be saved against the client along with a disability if relevant. This information is automatically added to the DVA claim if relevant.
5. Adding a [Distance](#) value to a DVA Claim – this allows the KM item to be added to an invoice and have a distance amount added to a claim. When payment for the travel is received in the Medicare Claim History report, the relevant Invoice is updated to include the additional payment made.
6. The ability to add [multiple items](#) to a DVA claim to enable claiming of consumable items in addition to the appointment.

## 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 screenshot shows a 'New Client Fields' form with the following fields and buttons:

- Practitioner: Billy Joel, Jason Cox, Louisa Perlmutter, View Only, Paula (All Clients) Collyty, ClaireTEST Law... Edit...
- Gender: Male
- Verify Medicare Number: [input field]
- Bank Account Registered: [checkbox] / 0
- Claimants: [button]
- DVA Number: N123546
- DVA Card Type: White
- DVA Disability: Osteoarthritis
- Verify DVA Number: [button]
- HF Family Number: 01
- SLK (ATAPS): AMSAR100619611
- Generate SLK: [button]
- Next Appointment: N/A
- Appts Booked This Year: 3
- Appts Attended This Year: 3
- Balance Owing: -\$601.00

The new fields available are:

- [HF Family Number](#)
- [Claimants](#) button
- [DVA Card Type & DVA Disability](#)

## Argus Secure Messaging

The [Argus](#) API was updated in V5 Sp2 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.

### 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.

### Reports

[NDIS Report](#) - This has been updated to include recent changes from 1 July 2018.

MYOB Export report – some changes have been made to how some specific cases are managed in the API, including the impact of some settings chosen in MYOB. This is documented in a section called [Special Circumstances and Settings](#).

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.

### Other changes

For details of other small changes that have taken place, they are details in the What's new in the version 6 documentation [here](#).

## Pre-upgrade checklist

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

Updated function	Used by customer	Additional information	Complete
All computers comply with new system requirements		Windows XP, Vista and Win 7 prior to SP2 are not supported. Review <a href="#">system requirements</a> .	
Confirm computer set-up configuration with Bp Allied support		<ul style="list-style-type: none"> <li>• Single Computer</li> <li>• Single database shared by multiple computers (direct connection)</li> <li>• Fully Hosted</li> <li>• Partially Hosted (no recreate required?)</li> <li>• Combination Fully and Partially Hosted</li> <li>• One or more computers syncing to your own server</li> </ul>	
Customised Client Layout		Review <a href="#">video</a> on how to update	
Custom Reports			
Tyro – HealthPoint Claiming <ul style="list-style-type: none"> <li>• Which health funds are being used?</li> </ul>		<ul style="list-style-type: none"> <li>• Do we need to provide you a customised Quote Template?</li> <li>• We need to supply some Health Fund Identifying numbers and digits to you for your set-up?</li> </ul>	
Argus Secure Messaging		Needs to be at least Argus V6	
Bp SMS <ul style="list-style-type: none"> <li>• Customer to contact Bp Allied Sales to sign up</li> </ul>			
Xero Integration		Review the documentation <a href="#">here</a>	

## What happens during the upgrade?

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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 5 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.

**🔔 To enable the V6 upgrade to occur Check for Updates MUST be run twice.**

- The first update will allow the V6 upgrade to occur but V5 will still be running.
- The second update will actually upgrade the Bp Allied to V6.

Please follow the instructions in the [Appendix: Using Check for Updates to Upgrade](#) on page 11.

## How to upgrade?

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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

This can be carried out by yourself, using the standard check for updates function or you can book this in with the Bp Allied Support team and they will lead you through this process.

On the day, the following will need to occur:

1. Follow the instructions in the [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

You can upgrade your computer to version 6 without our help. Please review the steps below on what needs to happen on the upgrade day:

1. Allow sufficient time to perform the upgrades on all computers. Once started, all computers must be upgraded.
2. Ensure that ALL information is saved and close Bp Allied on all computers
3. From this point, Bp Allied cannot be used on any computer until after it has been upgraded.
4. On the “server” or computer that is running the master database, follow the instructions in the Using Check for Updates to Upgrade on page xx.
5. Once the “server” has been upgraded, open Bp Allied and confirm that the upgrade has worked as expected.
6. 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.
7. Before anyone logs on, follow the instructions in What to complete immediately after upgrading.

Approximate time for upgrade:

- Server: 30mins - 1 hour
- Workstation: 10 - 15 minutes each

## Fully Hosted

You will be automatically upgraded by Bp Allied Development when V6 is released.

## 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. We will need upgrade your database on our server. You can then choose whether to upgrade the other computers yourself or have us assist with this.

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. 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

## 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. We will need upgrade your database on our server and your fully hosted clients. You can then choose whether to upgrade the other computers yourself or have us assist with this.

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. 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 and Fully Hosted Clients: 1 – 1 ½ hours
- Workstations: 10 - 15 minutes each

## One or more computers syncing to your own server

This can be carried out by yourself, using the standard check for updates function or you can book this in with the Bp Allied Support team and they will lead you through this process.

If, booked in with Bp Allied Support, then 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. 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

## What to complete immediately after upgrading

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### Support team to supply

1. Are you implementing Health Point?
  - a. If so, talk with the Bp Allied Support team if you require a customised Quote Template?
  - b. What Health Funds are being used? Obtain the details of the HealthFund Identifying numbers and digits from the Bp Allied Support team?

### Practice / Support team to carry out

1. 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.

## What can be done at a later stage?

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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 may be preferable prior to making these changes.

1. Change of SMS Provider
2. Tyro Healthpoint
3. Xero integration

## Appendix: Using Check for Updates to Upgrade

☛ This update **MUST** be run on the server (or master computer) first. All other computers running BpAllied must run a Sync All (if appropriate) and be closed before this is run.

☛ **To enable the V6 upgrade to occur Check for Updates MUST be run twice.**

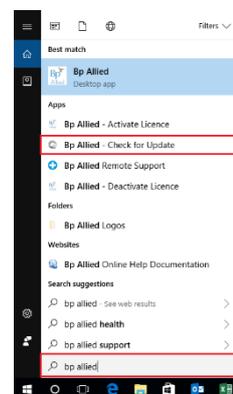
- The first update will allow the V6 upgrade to occur but V5 will still be running
- The second update will actually upgrade the computer to V6

*Note: To check if the database has been updated, the DBVersion field will be 6000 in the Versions table.*

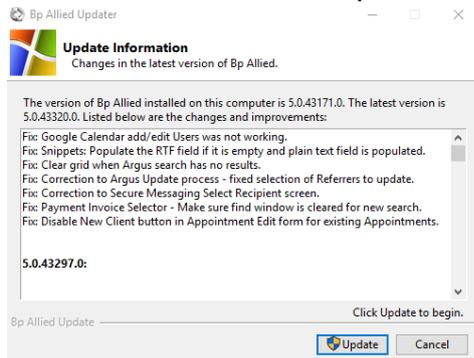
1. Click on **Check for Updates** in the title bar



This can also be initiated 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*

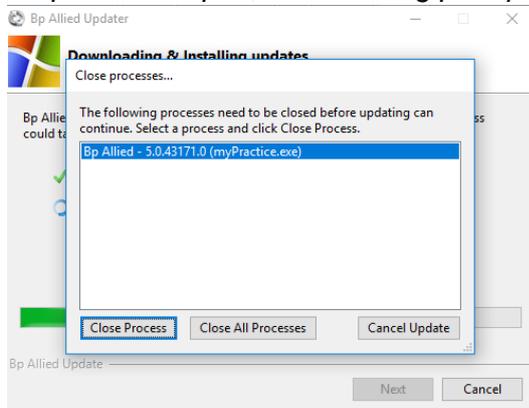


2. Click **Update**

3. If the security on the computer asks if you want to make changes, click **Yes**

4. The download will start.

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



5. Click **Close Process**

6. The upgrade should continue.

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

7. Click **Finish**