



How do I create electronic referrals?

This FAQ intends to explain how to send a specialist referral and other correspondence electronically via third party messaging systems such as Argus, HealthLink, etc.

Setup:

You will need to configure Best Practice to cater for each messaging provider that you will be using. This function should be performed on the Best Practice Server.



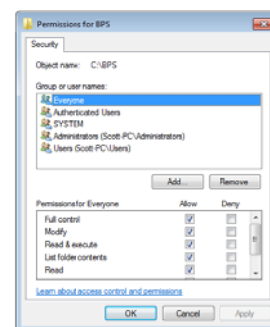
Note: Please check with each of your messaging providers to identify the folder they download documents to (Incoming) and retrieve documents from (Outgoing).

Share the 'Outgoing Message' Folder

Share the folder and set the permissions on the outgoing 'message' folder identified above so that all users on your network can create documents. **Please speak to your IT technician if you are not familiar with this process.**

Browse to the folder, right click and select 'Properties' > 'Sharing'.

On XP and Server 2003 servers - click on 'Permissions', highlight the user group 'Everyone' and ensure that they have 'Full Control'.



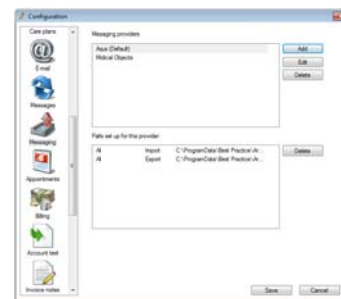
Permissions.gif

On Vista or Server 2008 servers - click on 'Advanced Sharing', tick 'Share this folder', click on 'Permissions', highlight the user group 'Everyone' and ensure that they have 'Full Control'.

Configure the Outgoing Messaging Folder

You will need to create a separate record for each messaging provider that you are using. This should be performed on the **Server ONLY**.

To create messaging providers, on the main Best Practice screen select 'Setup' > 'Configuration' > 'Messaging'. The configuration screen will appear for 'Messaging providers'.



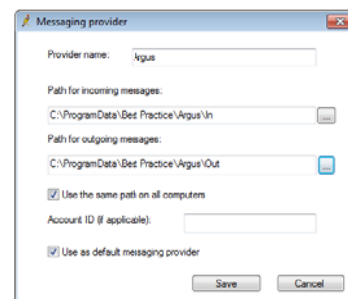
Click 'Add' and the 'Messaging provider' window will appear.

Provider Name – enter the name of the messaging provider

Path for incoming messages - enter the location for the incoming messages (NOTE: this can be either the local path or the UNC path)

Path for outgoing messages – enter the location for the outgoing messages.

(NOTE: this must be the UNC path for the folder so that users on workstations can access this folder across the network - ie \\server\HLINK\HLL7_in-RSDAU



This path must be different to the incoming messages path)

Use the same path for all computers – tick this field so that this setting applies to all users.



Use as default messaging provider – tick this field if this is to be the default provider to be used when sending HL7 messages when a contact does not have a messaging provider set.

Configure Contacts

You also need to configure each contact who you will be sending messages to indicate which messaging provider to use when sending them a message.

Select **'View' > 'Contacts'** from the main Best Practice screen.

Highlight the contact and click the **'Edit'** button.

The fields you need to update are towards the bottom of the screen.


Select the **'Messaging provider'** (from the drop down list) that you want to use when sending a HL7 message to this contact

Enter the Contact's Account ID with that messaging provider and the Contact's email address.

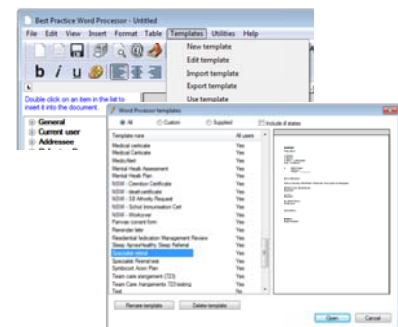
How to create an electronic referral

This method can also be used to send other forms of electronic correspondence.

Open the patient that the referral is to relate to.


To create the referral, open the word processor via **'Correspondence Out' > 'Add', 'File' > 'New Letter', F4** or click on the  icon on the toolbar.

From the word Processor select **'Templates' > 'Use Template'**. Select the template to be used for the referral from the list and click **'Open'**.

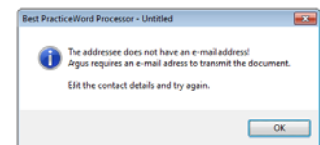


The template that you choose should contain a template field for **'Contact'**.

Select the relevant contact from the list.

Once you have completed the letter, you can transmit it by clicking the  icon or selecting **'File' > 'Export HL7'**.

If you did not selected a contact when you created the document, you will be prompted for a contact now. Select the appropriate contact from the list.



If the contact does not have an email address or provider number the error message showing will appear. Add this information to the contact record and send the message again.

When successful, the message file will be created in the folder specified in the setup section for **'outgoing messaging'** and this file should be picked up by the relevant Messaging Provider's software and transmitted.

MORE INFORMATION

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



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