

# **Primary Sense**

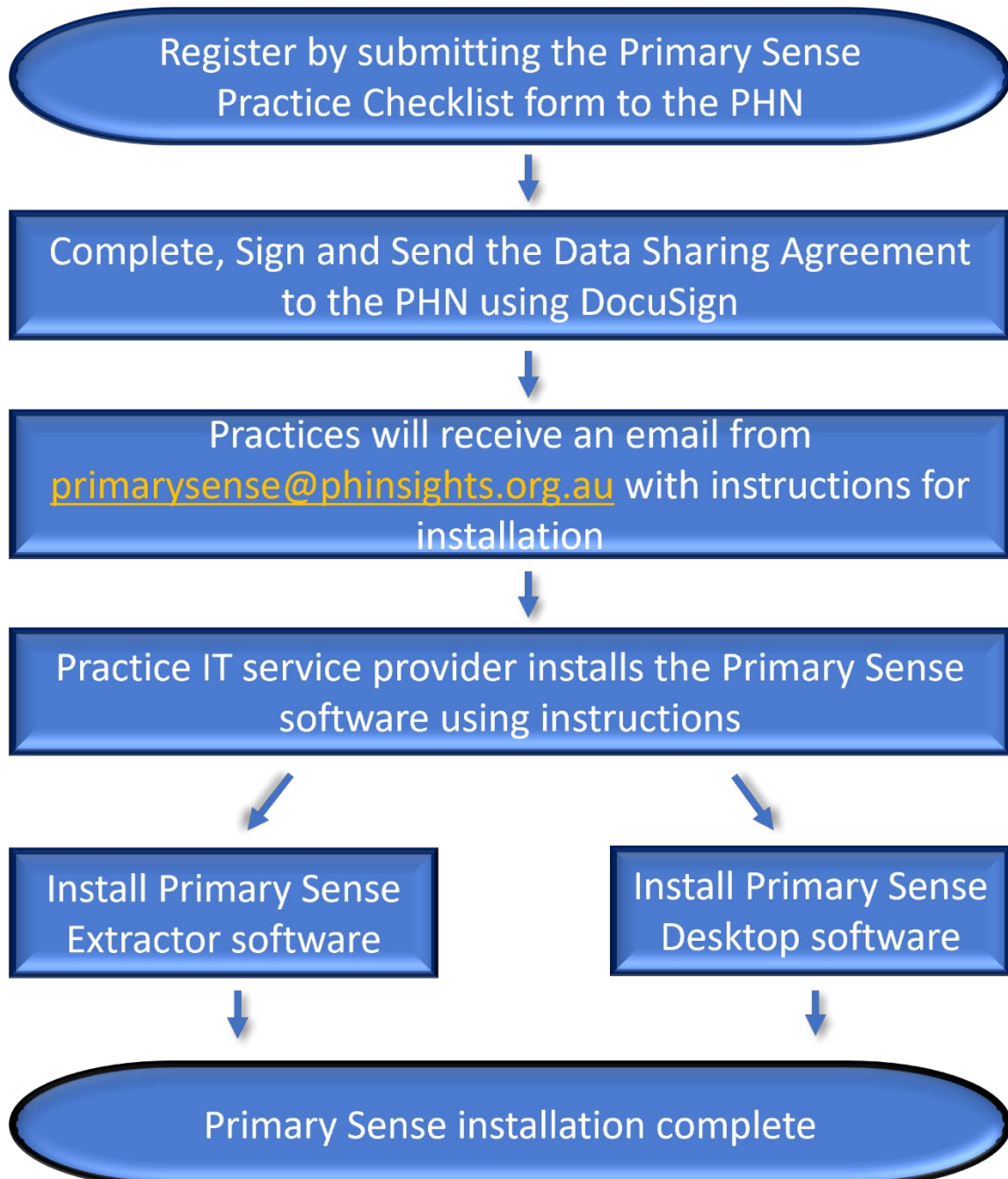
# **Application**

# **Support Welcome**

# **Pack**

**Sydney North Health Network**

## PRACTICE ONBOARDING STEPS



# WHERE TO FIND SUPPORT:

## GP Installation Hotline



[installation.support@  
primarysense.org.au](mailto:installation.support@primarysense.org.au)



1300 572 165

**Who is it for:** [practice IT staff](#) or [PHN staff](#) assisting in installation of Primary Sense

Please contact the GP Installation Hotline if you are experiencing issues installing Primary Sense and require technical support.

### Hours

AEST: 10:00am to 6:00pm

AWST: 8:00am to 4:00pm

ACST: 9:30am to 5:30pm

Monday to Friday (not including QLD Public Holidays). Please submit support requests via **email** outside of these hours.

## Installation Technical Support

# FAQ – GP Installation Hotline

## What technical support will the Hotline provide?

The Hotline will provide technical support during the **installation of Primary Sense**.

Support will be provided for issues relating to:

- Installation of the Primary Sense Services (**extractor**)
- Installation of the Primary Sense **Desktop**
- Troubleshooting support **immediately** following completion of first data extraction ("first run")

Once Primary Sense is operational ("first run" complete) at your practice, requests for support must be sent via your Primary Health Network.

## Who can use the Hotline?

Both **Primary Health Network staff** and **General Practice IT staff** can contact the Hotline, and only in the context of currently installing or troubleshooting installation of Primary Sense. The Hotline is not accessible for other General Practice users (e.g. practice managers, GPs, nurses), unless they are functioning in the capacity of 'IT staff.'

## How do I contact the Hotline?

Phone: **1300 572 165**

Email: [installation.support@primarysense.org.au](mailto:installation.support@primarysense.org.au)

## What are the hours for the Hotline?

Our helpdesk is monitored during the below hours, on business days (Monday to Friday, excluding QLD public holidays):

AEST: 10:00am to 6:00pm

AWST: 8:00am to 4:00pm

ACST: 9:30am to 5:30pm

No direct phone support is available after hours, however our email channels remain open at all times.

## How will the Hotline work?

- Please follow the installation guides ([Best Practice](#) or [Medical Director](#)) and consult the [troubleshooting guide](#) in the first instance.
- If your issue persists, either practice IT staff, or your Primary Health Network can request support by contacting the Hotline via **email** or **phone**.
- A ticket is raised for your issue
- Support engineers initiate action to respond to your ticket
- Hotline resolves ticket or escalates if required. Any escalation is managed by the Hotline.

## How long will it take for my issue to be resolved?

Our support team will respond to your request as soon as possible – please include as much information as available to assist us in resolving your issue promptly. In some cases our support team may need to escalate your issue for further support, in which case you'll be advised.

## What information is needed for my issue to be resolved?

Refer to the following page 'checklist for lodging a support request' for assistance.

## What support is in place for issues that don't relate to Primary Sense installation?

For issues that fall outside of the installation phase, please contact your PHN's Primary Sense team [PrimarySense@snhn.org.au](mailto:PrimarySense@snhn.org.au)

# Checklist for lodging a support request:

The checklist below outlines what information is needed when submitting a Hotline Helpdesk ticket. Please provide as much detail as possible to assist us in resolving your issue promptly. Because of the type of information required, we recommend submitting a support request via email in the first instance.

Please follow the installation guides ([Best Practice](#) or [Medical Director](#)) and consult the [troubleshooting guide](#) in the first instance.



## Contact details

- Name of **person & organisation** submitting the ticket
- Contact phone number for person submitting the ticket
- Name of **general practice** installing Primary Sense



## What has occurred:

- What are you currently attempting to do – extractor or desktop install?
- What step are you up to – refer to the [Best Practice](#) or [Medical Director](#) install instructions, where is the issue occurring?
- What is the issue/error message you are receiving?

*e.g. We are currently attempting installation of the Primary Sense extractor software and are experiencing a database connection error message when verifying the install.*



## Screenshots / logs / supporting information:

To assist in troubleshooting, provide any relevant screenshots and log files from **C:\ProgramData\PrimarySense\Logs**



## What troubleshooting has been undertaken so far:

Confirm any steps you have already taken to troubleshoot. e.g.

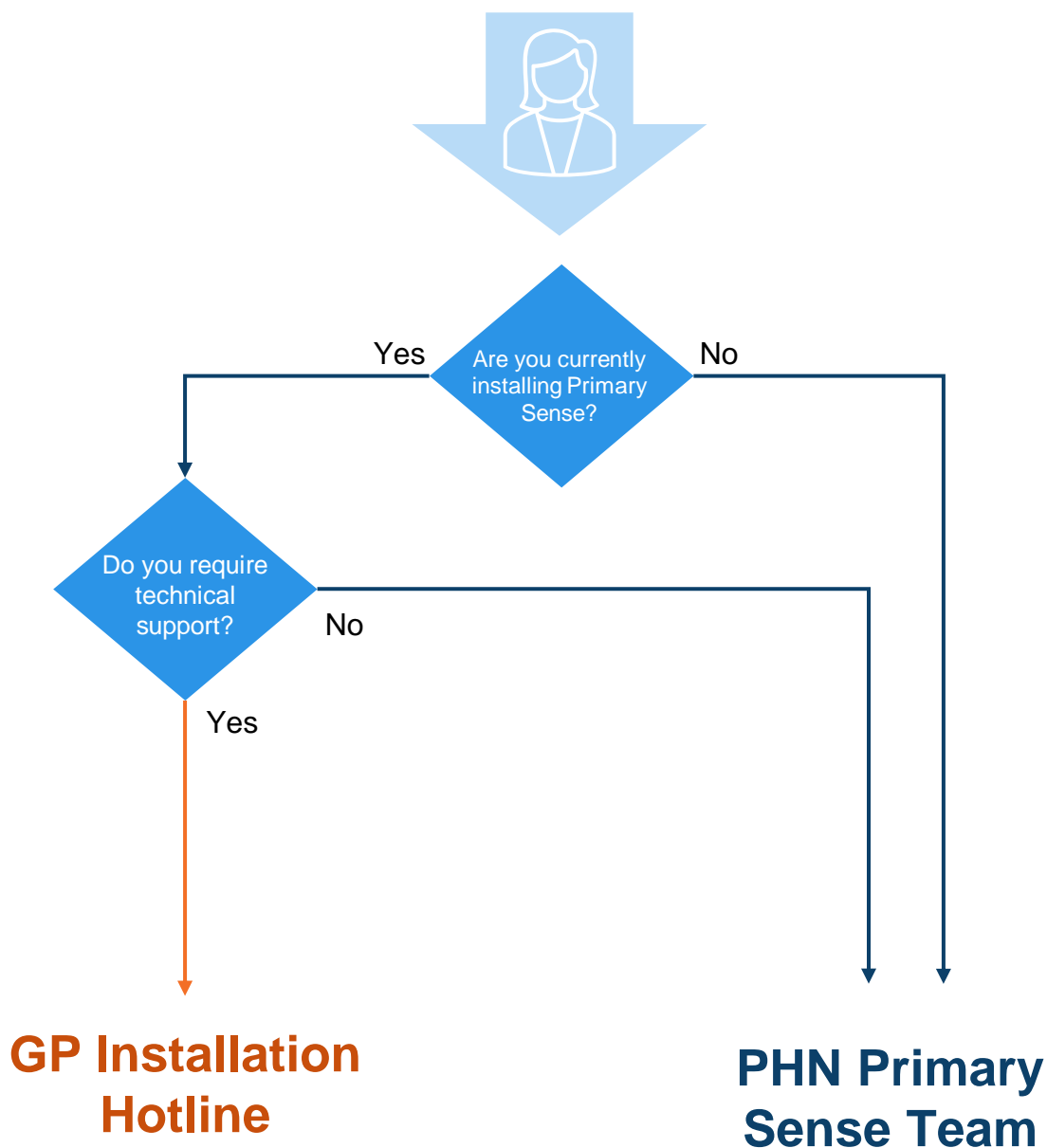
- confirmed firewall/antivirus are not causing an issue
- confirmed the Best Practice script has been run
- followed the troubleshooting guide re. database connection errors



## Next steps

- Would you like a call back? Please provide a time window in which you are available
- Or, would you like to be advised next steps via email?

# Unsure who to contact?



# HIGH LEVEL INSTALL PROCESS - Extractor

Click here ([Best Practice](#) / [Medical Director](#)) for full install instructions

01

## Before you Begin

- ☐ Ensure you have System Administrator rights
- ☐ Ensure you have the PASSWORD for Best Practice (BP) / Medical Director (MD)
- ☐ If BP, ensure the practice is running the BP October 2022 Data Update (or newer)
- ☐ Ensure you have the practice's Client ID and Client Secret from Primary Sense (located in the "Welcome to Primary Sense" email)

02

## When Installing

- ☐ Log on to the server with administrator privileges
- ☐ Check the permissions to ensure all users will have access to the C:\ProgramData\PrimarySense folder
- ☐ If BP ensure you CONFIGURE THIRD PARTY ACCESS to the database in BP, select 'Primary Sense' and SAVE
- ☐ If MD ensure you run the READ ONLY ACCESS SQL script (password needed)
- ☐ Download and install software using the download links in the "Welcome to Primary Sense" email, following the prompts
- ☐ Ensure the right Database Connection settings:  
PracticeServerName\BPINSTANCE (BP) or  
PracticeServerName\HCNSQL07 (MD)
- ☐ Ensure you select the right CIS DATABASE to connect to:  
BP: BPSpatients or  
MD: HCN
- ☐ TEST THE CONNECTION

03

## Final Step

- ☐ Check the Primary Sense SERVICES ARE RUNNING

# HIGH LEVEL INSTALL PROCESS - Desktop

Click here ([Best Practice](#) / [Medical Director](#)) for full install instructions

01

## Before you Begin

- ☐ Ensure you have System Administrator rights
- ☐ Ensure you have the PASSWORD for Best Practice (BP) / Medical Director (MD)
- ☐ Ensure you have the practice's Client ID and Client Secret from Primary Sense (located in the "Welcome to Primary Sense" email)

02

## When Installing

- ☐ Select PCs with BP or MD installed
- ☐ Log on to the PC with administrator privileges
- ☐ Ensure FIREWALLS / ANTIVIRUS allow Primary Sense addresses
- ☐ Download and install software using the download links in the "Welcome to Primary Sense" email
- ☐ Check that the installation was successful by opening up the list of installed applications and SEARCHING FOR PRIMARY SENSE.
- ☐ Check the PERMISSIONS to ensure all users will have access to the C:\ProgramData\PrimarySense folder.
- ☐ LOG OUT and log back in as a USER
- ☐ Search for the DESKTOP APP in the startup bar to check if installed
- ☐ Add the CLIENT SECRET and CLIENT ID to the interface
- ☐ If BP, ensure you click THIRD PARTY ACCESS and OK
- ☐ Ensure the right Database Connection settings:  
PracticeserverName\BPINSTANCE (BP) or  
PracticeServerName\HCNSQL07 (MD)
- ☐ Ensure you select the right CIS DATABASE to connect to:  
BP: BPSpatients or MD: HCN
- ☐ TEST THE CONNECTION
- ☐ Check you can SELECT A PRACTITIONER in the tab

03

## Final Step

- ☐ Try running the 'Pregnant and Vaccinations' report in the report tab (note: reports won't run until the initial extract is complete)



# Troubleshooting - Extractor

## Extraction doesn't intiate

Checklist / Confirm:	Troubleshooting and Fixes
Are the CORRECT Client secret and Client ID being used for the practice?	Refer to the 'Welcome to Primary Sense' email for correct practice details.
Does the PRACTICE SOFTWARE CORRELATE with the install instructions?	Navigate to the <a href="#">Best Practice</a> / <a href="#">Medical Director</a> specific instructions
If MD was the READ ONLY SCRIPT RUN?	Confirm the script was run on the right database, and the same password is being used as when the account was created.
If BP, is the 'Primary Sense' connection enabled?	Confirm the connection was SAVED. Confirm the practice is running the BP October 2022 Data Update (or newer)
Is the SQL authentication 'PHN user' and DB correct?	Confirm: MD: HCN Confirm: BP: BPSpartner and BPSpatients
Was the TEST connection done to check?	Test connection
Are PERMISSIONS enabled to the C:\ProgramData\Primary Sense folder?	Enable permissions
Have any FIREWALLS been set to allow the Primary Sense addresses?	Set firewall settings to allow Primary Sense addresses
The Primary Sense services aren't running	Try a RE-START

## Extraction stops

Checklist / Challenge	Troubleshooting and Fixes
Has a NEW SERVER been installed?	Uninstall services on Server 1, copy C:\ProgramData\PrimarySense folder from Server 1 to Server 2, install and run set up on Server 2.
Has the practice CHANGED clinical information system?	Will need to contact the PHN and re-onboard the practice
New FIREWALL?	Configure permissions in the C:\ProgramData\Primary Sense folder.
Has the C:\ProgramData\Primary Sense\Settings\extractor.json file become CORRUPT	If the file is blank: delete the file, run setup again and configure the services.
Offline (outage or server off)	Check Microsoft Windows Service Manager Startup Type is set to Automatic

# Troubleshooting - Desktop

## Desktop doesn't work on install

Checklist / Confirm:	Troubleshooting and Fixes
Are the CORRECT Client secret and Client ID being used for the practice?	Refer to the 'Welcome to Primary Sense' email for correct practice details.
Does the PRACTICE SOFTWARE CORRELATE with the install instructions?	Navigate to the <a href="#">Best Practice</a> / <a href="#">Medical Director</a> specific instructions
If MD was the READ ONLY SCRIPT RUN?	Confirm the script was run on the right database, and the same password is being used as when the account was created.
If BP, is the 'Primary Sense' connection enabled?	Confirm the connection was SAVED. Confirm the practice is running the BP October 2022 Data Update (or newer)
Is the SQL authentication 'PHN user' and DB correct?	Confirm: MD: HCN Confirm: BP: BPSpartner and BPSpatients
Was the TEST connection done to check?	Test connection
Are PERMISSIONS enabled to the C:\ProgramData\Primary Sense folder?	Enable permissions
Have any FIREWALLS been set to allow the Primary Sense addresses?	Set firewall settings to allow Primary Sense addresses
Can a practitioner be selected?	<p>If NO: close the app, confirm MD/ BP is running on the PC and re-open the desktop app</p> <p>If a certain practitioner can not be selected but others CAN, ensure permissions are enabled for all users C:\ProgramData\Primary Sense folder.</p>

## Desktop stops working

Checklist / Challenge	Troubleshooting and Fixes
Has a NEW SERVER been installed?	Uninstall services on Server 1, copy C:\ProgramData\PrimarySense folder from Server 1 to Server 2, install and run set up on Server 2.
Has the practice changed clinical information system?	Will need to contact the PHN and re-onboard the practice
New FIREWALL?	Configure permissions in the C:\ProgramData\Primary Sense folder
Has the C:\ProgramData\Primary Sense\Settings\extractor.json file become CORRUPT for a certain user?	Close Desktop, delete the desktop.json file in C:\ProgramData\Primary Sense\Settings and restart Primary Sense. This will create a new blank file you can configure again

# COMMON TERMS

## Terms & Descriptions

<b>Primary Sense</b>	A third party data extraction, analysis and reporting tool for use in general practice, administered by PHNs.
<b>CIS</b>	Clinical information software used at the practice
<b>MD</b>	Medical Director CIS
<b>BP</b>	Best Practice CIS
<b>PHN</b>	Primary Health Network that supports the practices in the region
<b>Client Secret and Client ID</b>	Unique, secure identifiers generated by Primary Sense for each practice.
<b>Primary Health Insights (PHI)</b>	National data storage and analytics platform in Microsoft Azure managed by PHNs