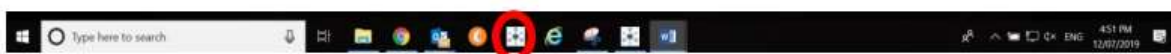


Primary Sense Desktop Settings WALKTHROUGH

Entering your clinical information to configure desktop settings

Instructions with Screenshots

Click on the Primary Sense™ icon on the bottom toolbar to view the Primary Sense™ sidebar.



Once open, click on the Primary Sense icon that appears and select the 'Settings' menu option from the drop-down menu (shown to the left). This will open the 'Settings' window shown below.



Configure Practice Settings

The Primary Sense Desktop setup window will appear, or double click Primary Sense settings icon to display the settings window.

Primary Sense™ Settings

- Practice
- Connection
- Practitioner
- Advanced

Client ID

Enter your practice client ID

Client Secret

Enter your practice client secret

...

Practice Name

Enter your practice token

Practice Software

Enter your practice token

OK

Cancel

Select the **Practice** tab and enter the practice credentials – these are located in the 'Welcome to Primary Sense' email you received. From the email:

- Copy and paste the **Client ID** (practice ID)
- Copy and paste the **Client Secret** (practice password)
- Click the [...] ellipses button

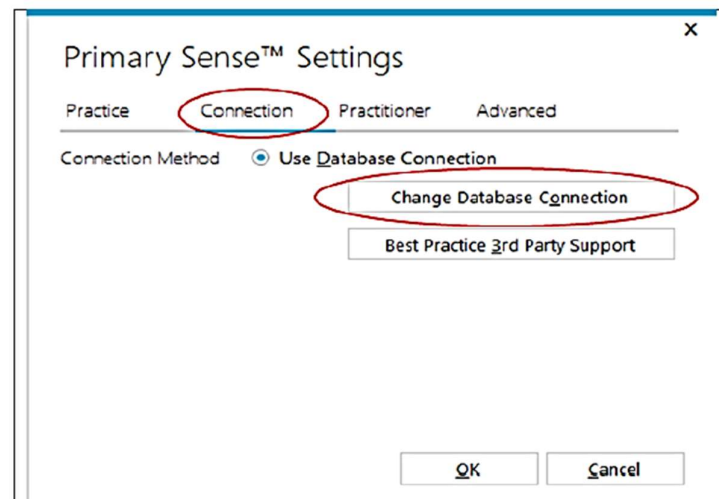
It will take a moment to identify the practice details.

If your clinic name and software are not correct, please contact your IT provider.

***Please make sure to click the ellipses once you have copied and pasted the 'Client ID' and 'Client Secret'. Once clicked, your clinic name and clinical software will appear in the boxes below. Then click 'OK'*

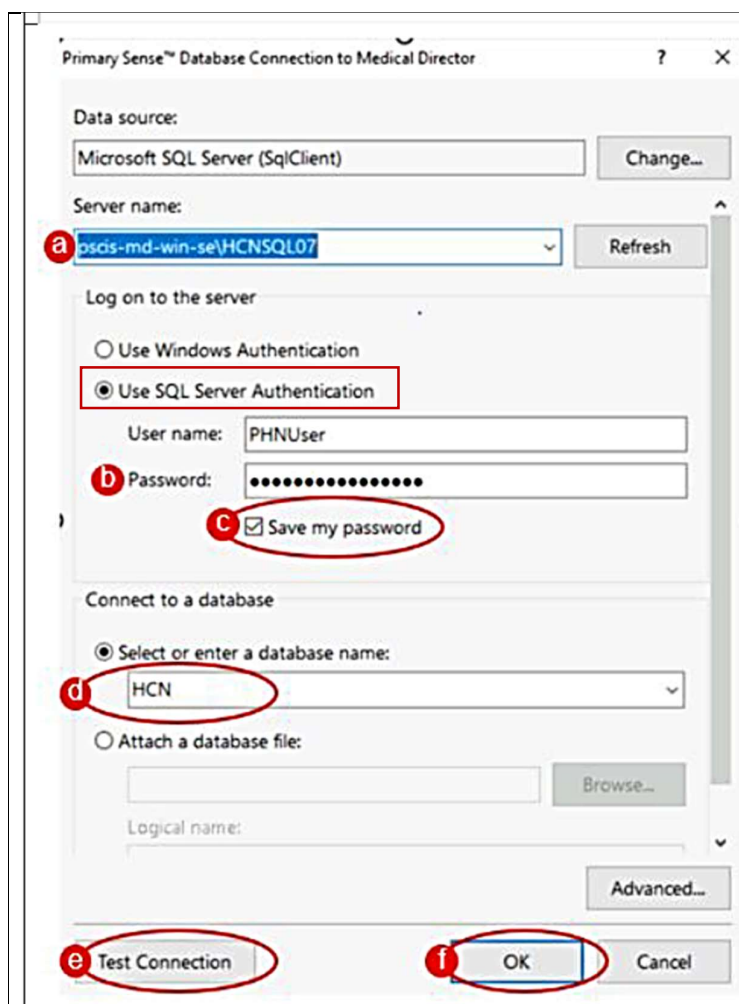
After you click "OK", the 'Settings' box will close, and you will need to re-open it by selecting it from the menu. Follow further steps below.

Click 'Connection' -> 'Change Database Connection'



In the 'Change Database Connection' name, check 'Server name' is correct.

For Medical Director database configuration see below (BP database instructions on next page)



- Server name should be **yourservername\HCNSQL07**
- If not correct, use the drop-down box to select correct server name and database name
- Check 'Use SQL Server Authentication' is chosen
- Enter password that was created by your IT when they set up 'Primary Sense' on the server via the SQL Script. If you do not have it you will need to call them
- Tick 'Save Password'
- Ensure 'Database Name' is 'HCN'
- Click 'Test Connection'
- Click 'OK'

If Test Connection fails, first check that your server's name is correct. If still receiving an error, please contact your IT provider to assist

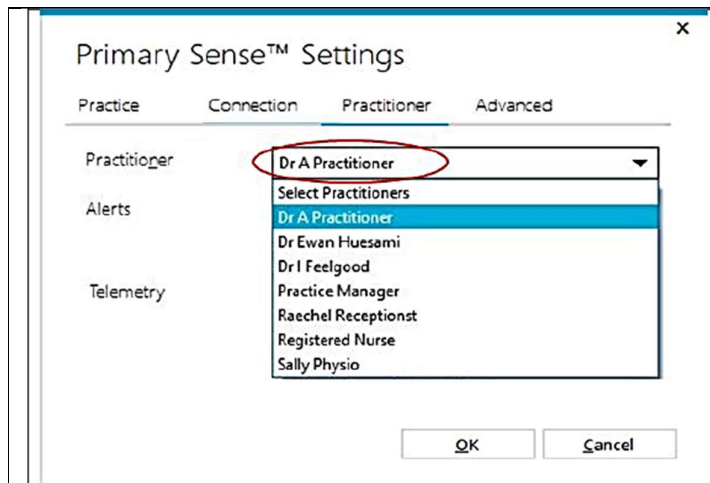
*** For Best Practice database configuration see below*

- Server name should be *yourservername\BPSINSTANCE*
- If not correct, use the drop-down box to select correct server name and database name
- Check 'Use SQL Server Authentication' is chosen
- The 'User name' and 'Password' should be pre-populated
- Tick 'Save my password'
- Ensure 'Database Name' is *'BPSPatients'*
- Click 'Test Connection'
- Click 'OK'

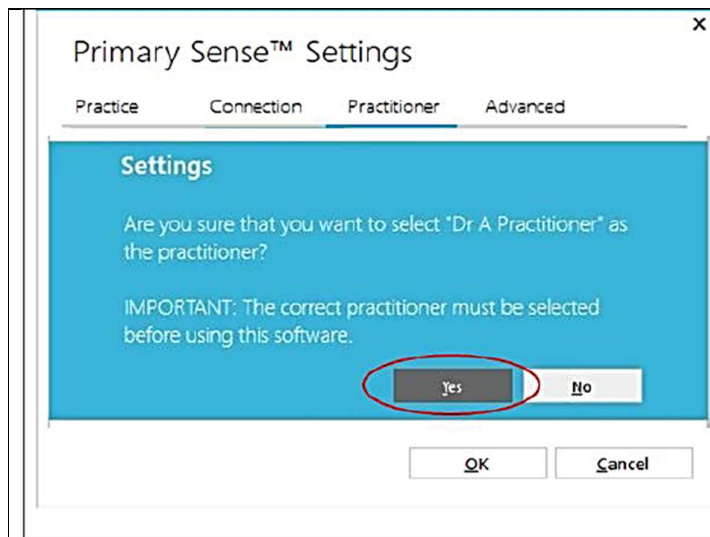
If Test Connection fails, first check that your server's name is correct. If still receiving an error, please contact your IT provider to assist

Now that the database connection has been configured and tested the next steps can be followed for either Medical Director OR Best Practice. Close 'Primary Sense' -> ensure your clinical software is open (either MD or BP) and you're logged in to it as yourself -> re-open Primary Sense -> select 'Settings' menu item -> follow the instructions below

- Select the *Practitioner* tab
- Your name should already be selected (the current user)
- If not, select it from the drop-down menu (see next page)



If the practitioner's name is not listed, you will need to set up the practitioner in your practice software. Contact your practice software vendor for help on setting this up if you require assistance.



You will receive a message asking if you would like to select this practitioner.

- *Choose 'Yes' to confirm or 'No' to select a different practitioner*

You can now close 'Settings' and Primary Sense should be ready to use and run reports.

User Tips: *If you receive an error upon running a report:*

- *Re-check the database settings and make sure the 'Test Connection' is successful*
- *Make sure the person who is logged in to the clinical software is the same as the practitioner chosen in the drop-down list of the 'Practitioner' tab.*
- *If these steps have been followed and you still receive an error when running reports or operating Primary Sense, please contact your IT provider for further assistance*

Error messages and their suggested fixes can also be found in the [troubleshooting guide](#).