

Instructions for generating a JSON file of a PIP QI report for quarterly submission

Generating a JSON file of a PIP QI report within MedicalDirector

Instructions:

1. Download and install the latest version of MedicalDirector Insights on your server and any workstations you would like to upgrade by visiting the MedicalDirector [Clinical Updates](#) webpage.
2. Open MedicalDirector Insights and log in with your MedicalDirector Clinical credentials.
3. Once Insights is updated, you must take a Snapshot of the latest available data – a guide on this process is available on the [Taking a Collection](#) webpage.
4. A guide to reporting in Insights is available on the [Insights Reporting](#) webpage.
5. Under the Reporting tab, select the PIP QI report.
6. Click PIP QI Export at the top right of the page.
7. Choose an appropriate file name and location and click Save.
8. This is the JSON file that needs to be uploaded as per the [PIP QI Uploader Instructions](#).

Generating a JSON file of a PIP QI report within Best Practice (Bp)

Instructions:

1. Download and install the Bp Premier Reporting Tool by clicking on this [link](#). The file will download to the default download directory for your version of Windows, such as Favourites > Downloads. You may be asked to confirm that you want to download the file.
2. Copy the downloaded file to the Bp Premier server or any workstation and double-click to start installation.
3. Windows User Access Control or SmartScreen may prompt for permission to proceed. Click Yes and the Application Install screen will appear.
4. Click Install and a progress dialog will show the report utility being installed.
5. When the utility has been installed, the Bp Premier Reporting Tool will open, and an icon will also be created on the Windows desktop. Installation is complete.
6. Run the Reporting Tool for PIP QI by clicking PIP QI.
7. The login panel will appear. Enter the username and password of a Bp Premier user. The user must have the Reports permission set to Allow Access.
8. Click Next and the Settings panel will appear. Select the Report End Date. This should match the end date of the reporting period.
9. If you are reporting on a single practice location only, select that location. Otherwise, leave Location set to All Locations.
10. Data to include will be ticked by default to include PIP QI measures. Do not untick this checkbox.
11. If required, click Add to open the Advanced Filtering Options. Select Like or Not Like from the dropdown menu and enter an SQL search in the text field. Only use these advanced filtering options if your practice has complex reporting requirements.
12. Click Next and the Generating panel will appear.
13. Save a copy of the report as a JSON file.
14. This is the JSON file that needs to be uploaded as per the [PIP QI Uploader Instructions](#).