

PRIMARY SENSE Halo Integration

Step by Step Instructions

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Overview

Halo refers to **Halo Connect**, which is a **cloud based, interoperability platform** created to allow secure, real-time access to data held in **Best Practice (BP) Premier** via a single, standardised Application Programming Interface (API).

Halo is designed to be the **only supported way** for third party tools like Primary Sense to access BP data going forward rather than multiple bespoke or desktop-based- integrations.

BP has activated settings that allow you to generate a pairing code for third-party integration.

To enable Halo integration with Primary Sense, you need to set up this pairing code. BP Premier creates a unique pairing code, which must be used alongside your BP Site ID to successfully register and activate the integration.

In these steps, the pairing code will be generated and applied for Primary Sense but the data extraction from Halo will not commence until a later stage. Information will be provided when this is to occur.

Pre-requisites Best Practice

The Pairing Code feature was released in BP Spectra SP1 Revision 3.

BP Pre-requisite 1

- Upgrade Best Practice to **Spectra SP1 Revision 3** or later

BP Pre-requisite 2

- Install the latest Data releases from Best Practice as per your normal processes.

A backwards-compatible standalone utility version of the configuration screen will also be made available to practices using Orchid SP2 by contacting Best Practice for instructions, however we strongly suggest that you install the **Spectra SP1 Revision 3** or later.

Pre-requisites Primary Sense

The latest Primary Sense Extractor must be installed on your server.

The Primary Sense extractor version must be v2.48.162.36785 or **later**.

If you are not on the latest version of the extractor, you will **not be able to setup** your pairing code.

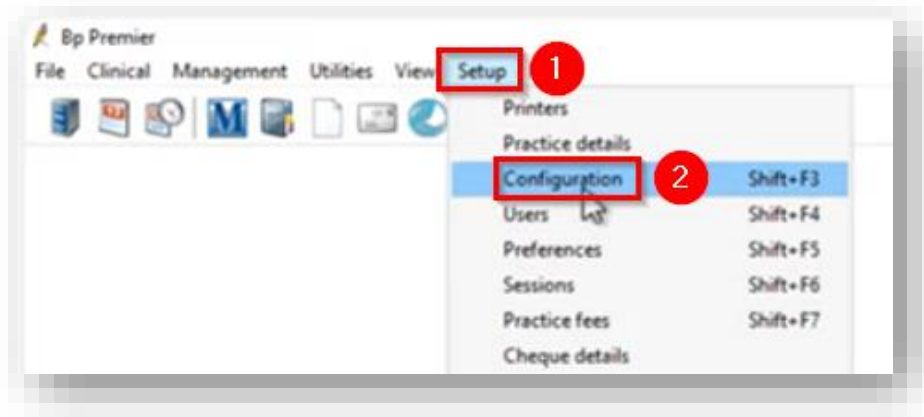
Please follow the normal instructions for upgrading and installing the extractor found [here](#) on the [Primary Sense website](#).

To check what extractor your practice is on, contact Practice Support at practicesupport@brisbanenorthphn.org.au or phone 3490 3495.

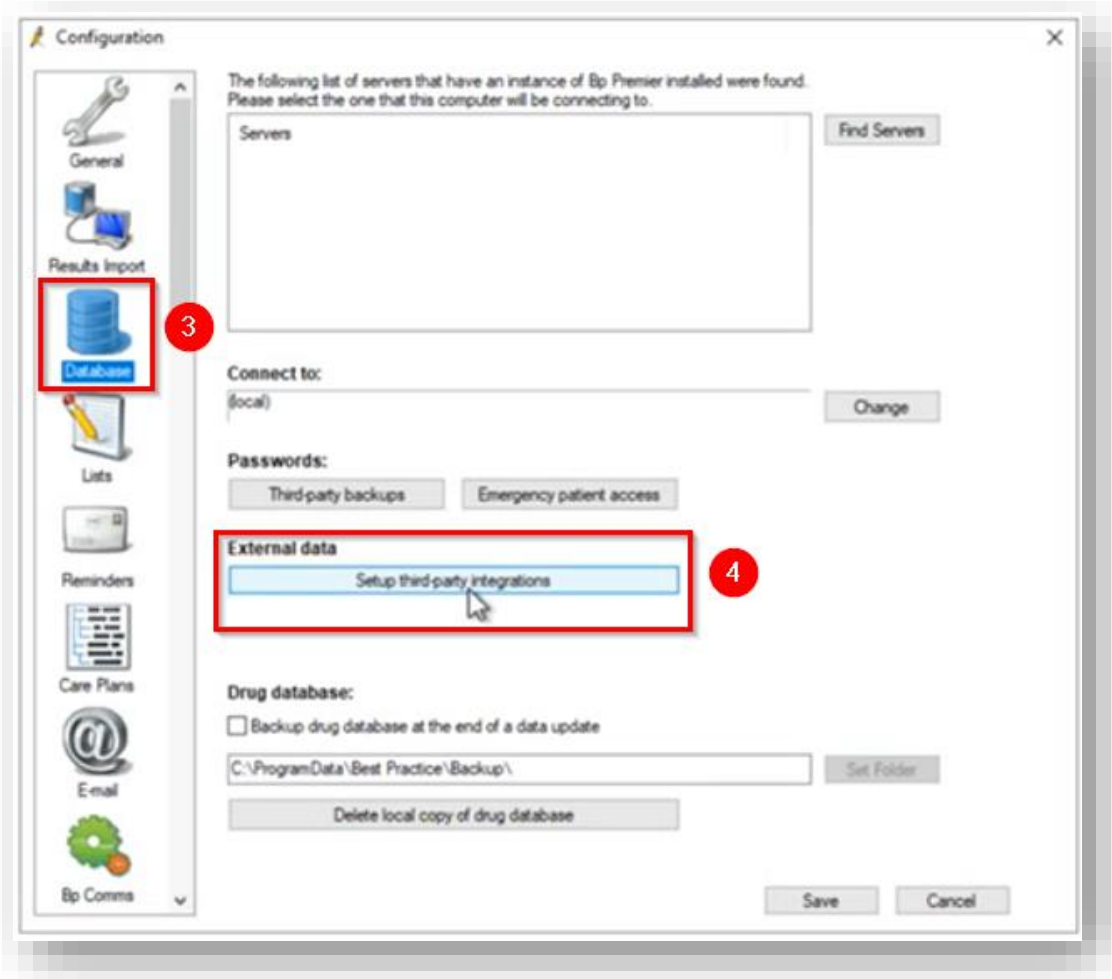
Connecting to Halo in Best Practice – **Server** Access is required.

In Best Practice on the **SERVER** complete the following steps:

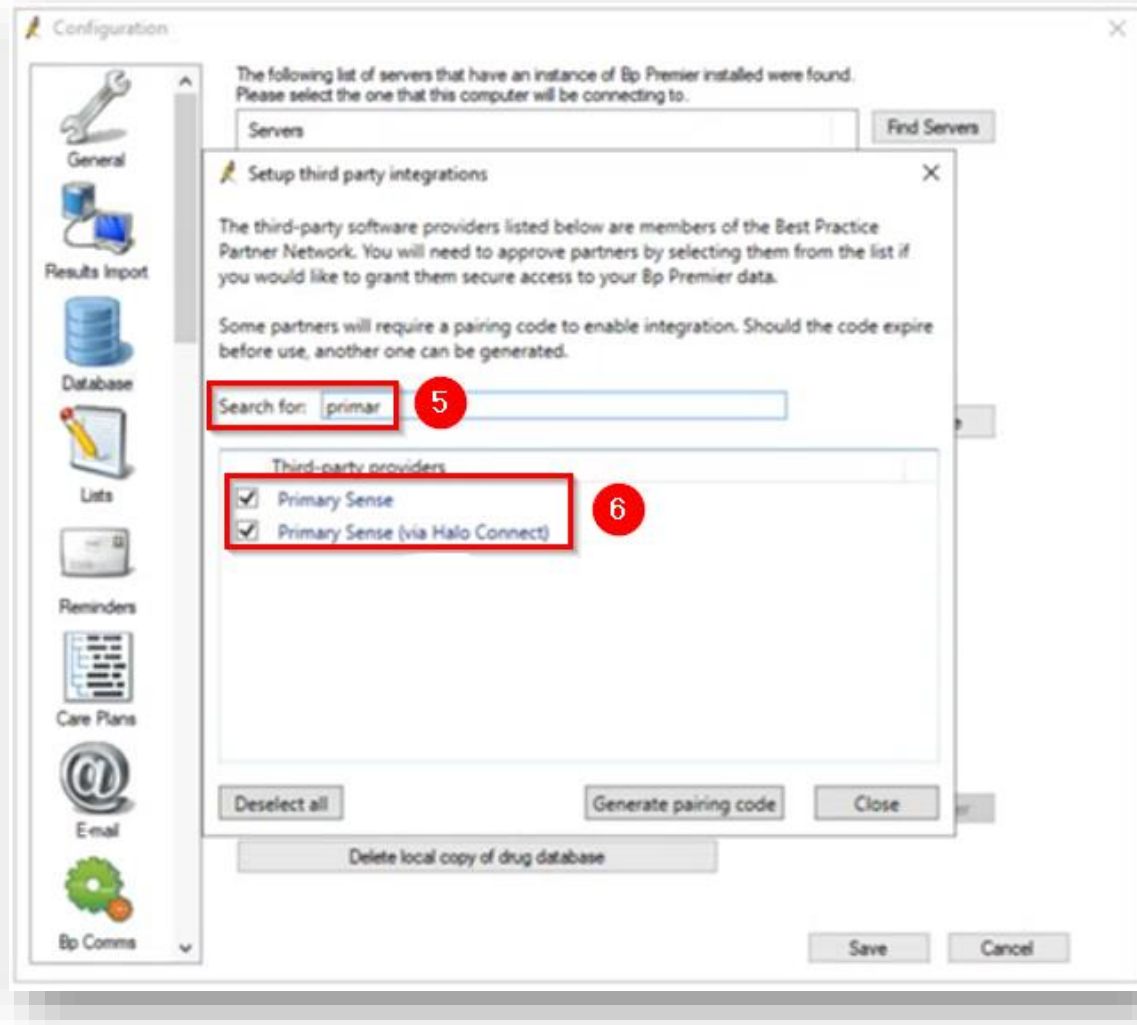
1. Navigate to Setup **(1)** > Configuration **(2)**



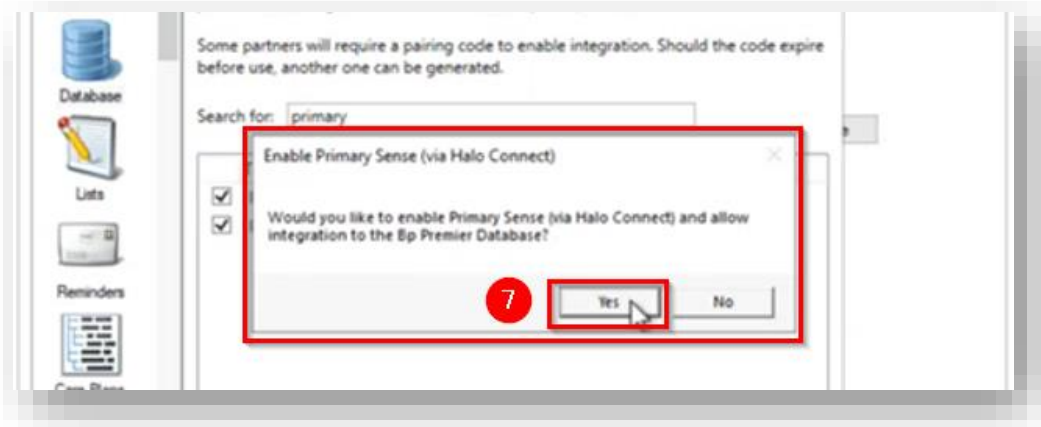
2. Database **(3)** > Setup third-party integrations **(4)**.



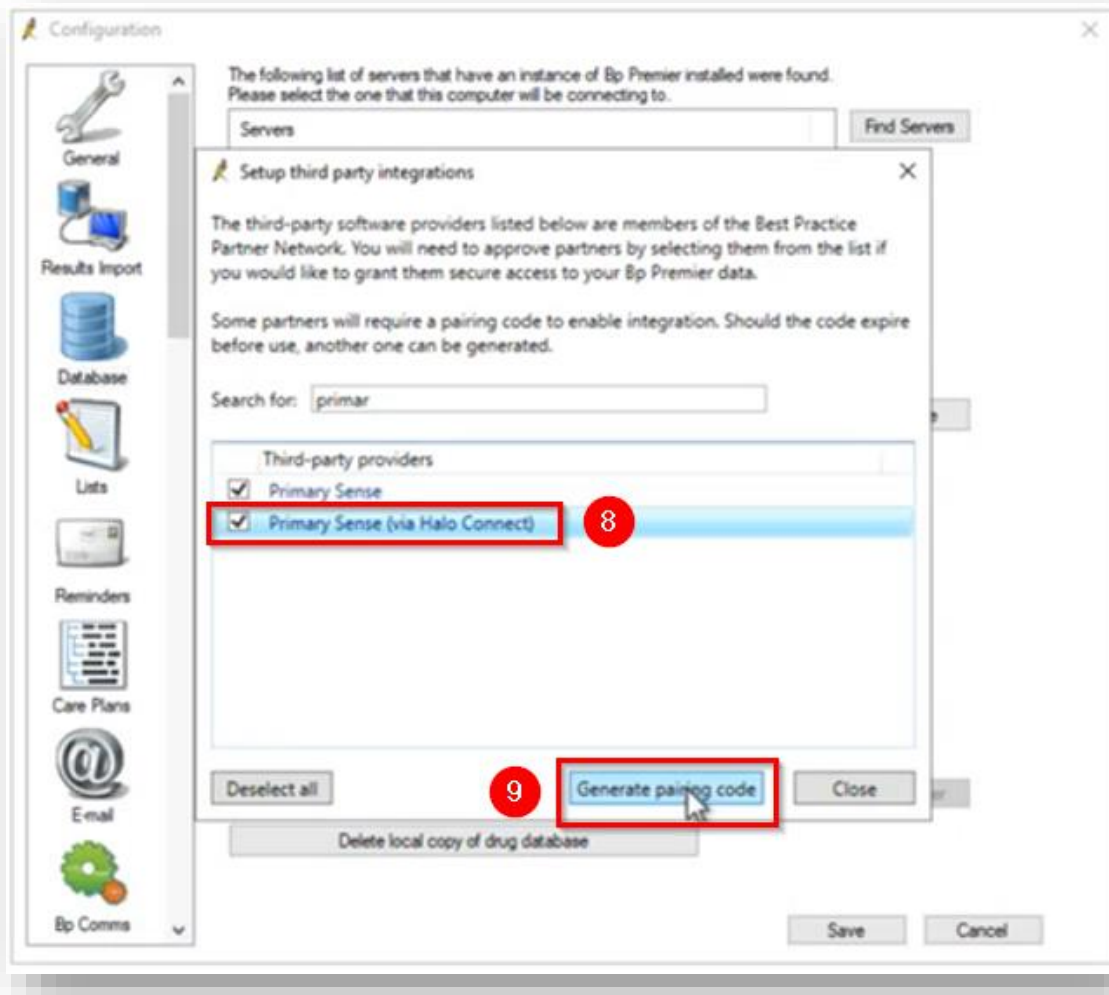
3. In the third-party providers list search for **Primary Sense (5)** and tick **BOTH Primary Sense AND Primary Sense (via Halo Connect) (6)**. **IF BOTH BUTTONS ARE NOT TICKED, PRIMARY SENSE WILL NOT WORK.**



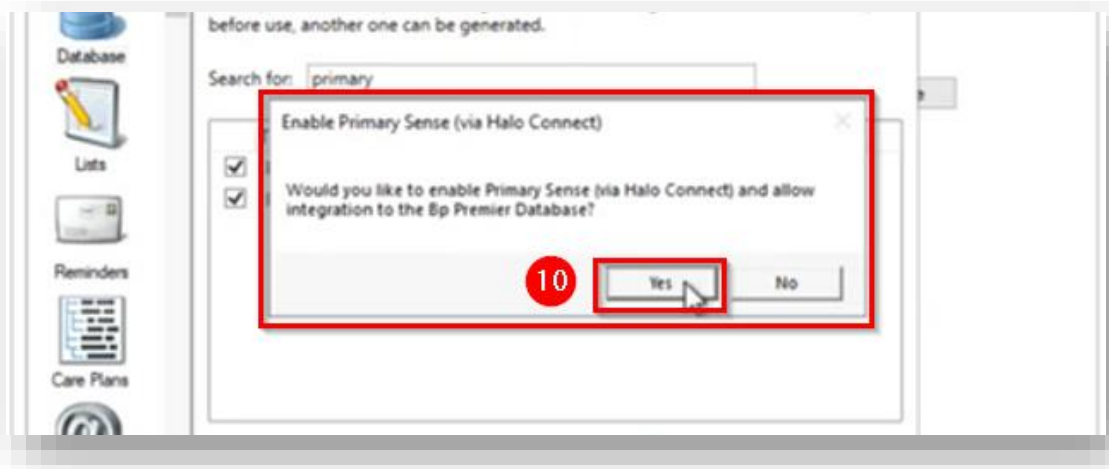
4. When you tick **Primary Sense (via Halo Connect)** you will get a pop up confirming that you want to enable Primary Sense (via Halo Connect). Select **[Yes]** (7)



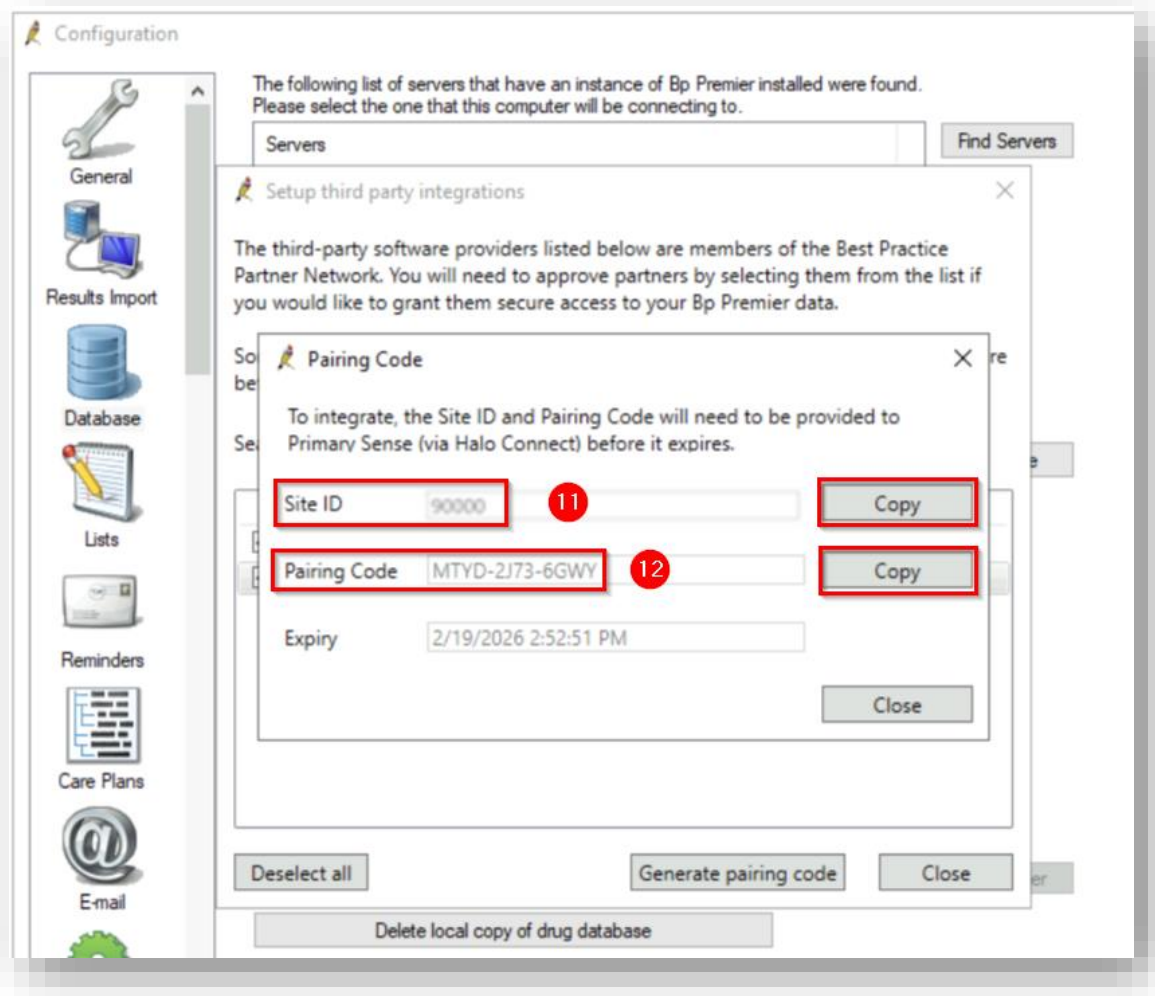
5. Highlight (click) the **Primary Sense (via Halo Connect)** line so it becomes blue (8) and click **[Generate pairing code]** (9)



6. You will get another pop up confirming that you want to enable Primary Sense (via Halo Connect). Select **[Yes]** (10)



7. A screen will open displaying your **Site ID (11)** and **Pairing Code (12)** with the expiry date of the pairing code.



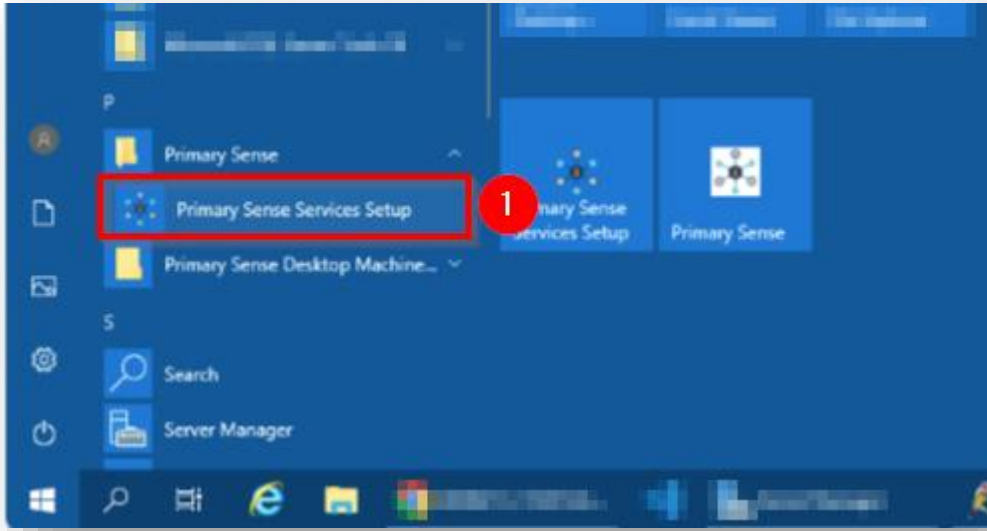
8. Use the **[Copy]** button and record the Site ID and Pairing Code. This site ID and Pairing code will be used in the HaloConnect Setup screen later. Alternatively, you can prepare the Primary Sense Halo Setup below first and paste directly.
9. Click **[Close]**, then **[Close]** again
10. Click **[Save]**, then **[Save]** again



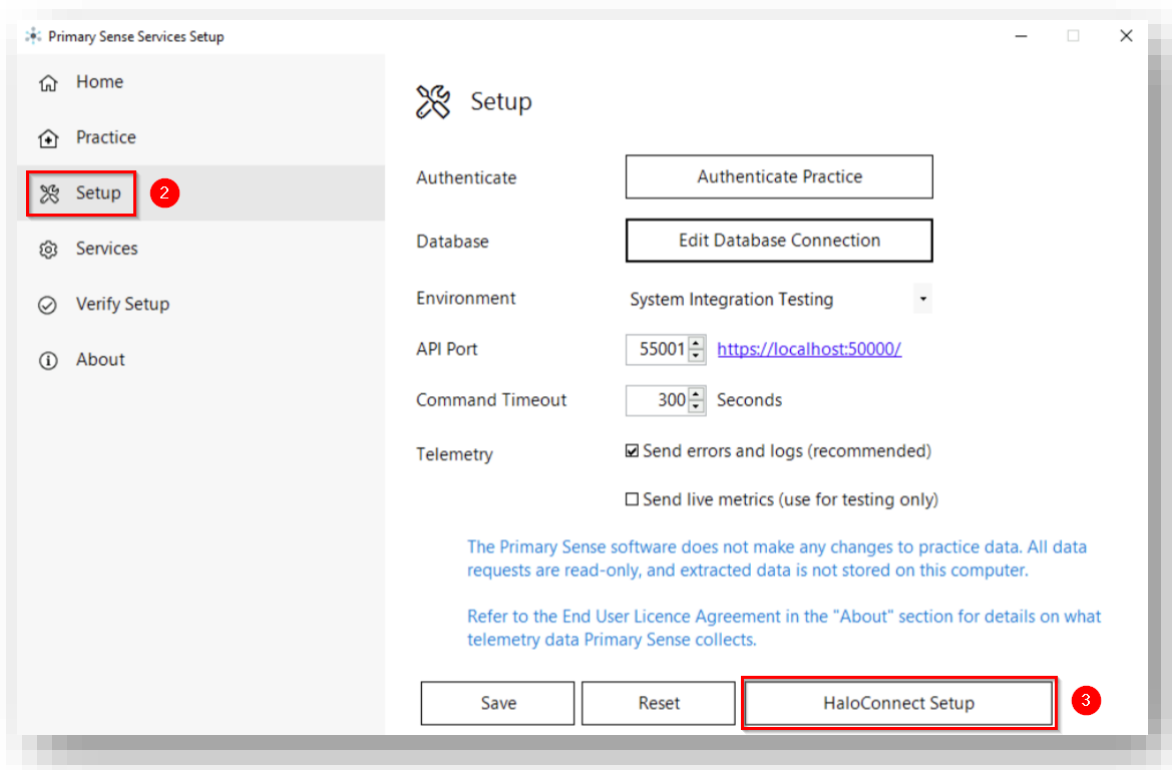
NOTE: You can regenerate a pairing code if required by following the previous steps five and six.

Primary Sense Halo Setup

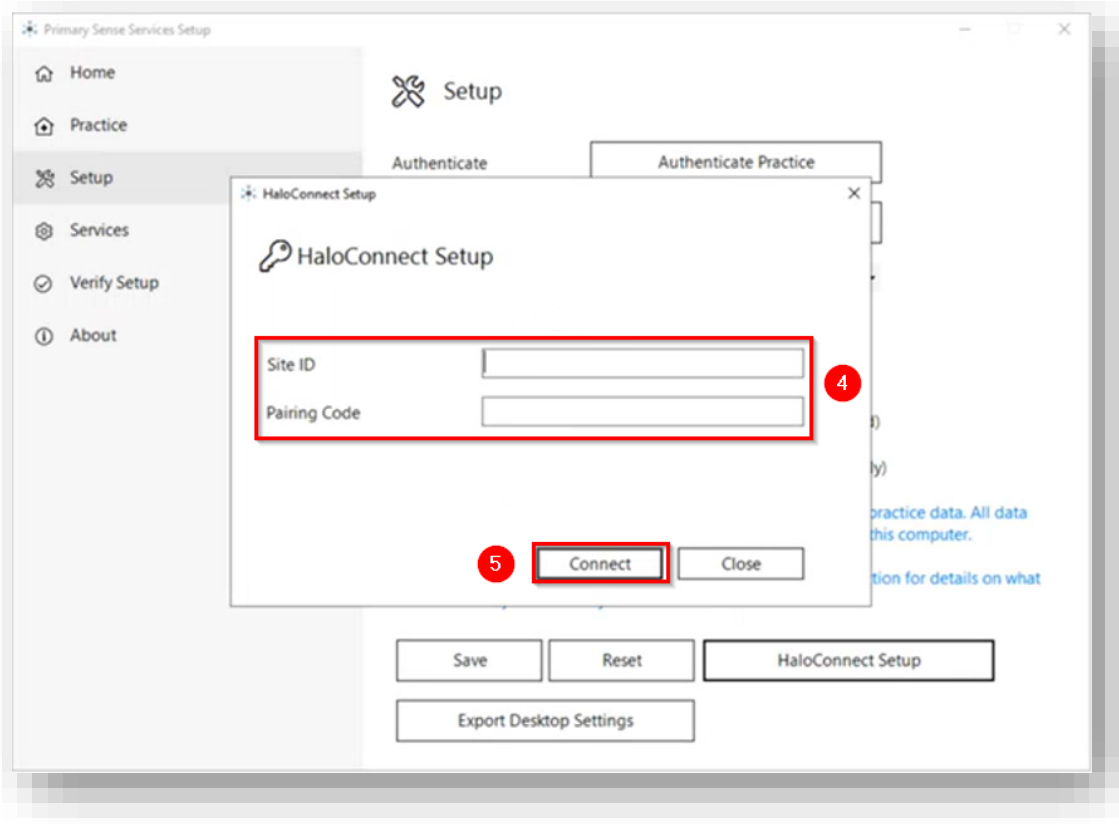
1. From your Windows menu open Primary Sense Services Setup **(1)**



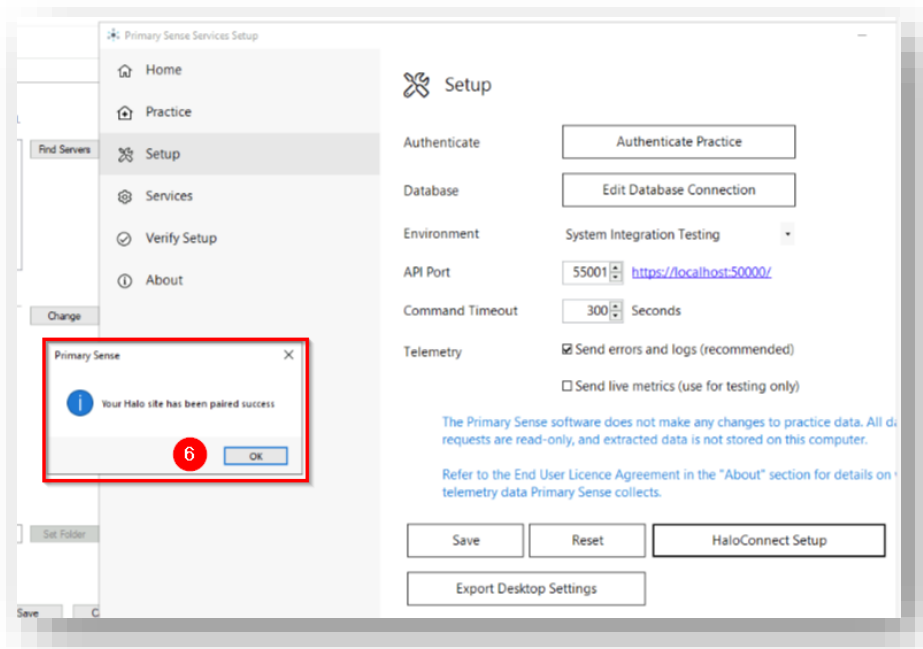
2. Select Setup (2) > HaloConnect Setup (3). **Note:** Do not select Edit Database Connection button, this is not relevant to this process.



3. The HaloConnect Setup screen will open. Paste or enter the saved Site ID and Pairing Code (4). Click [Connect] (5).



You will receive a message 'Your Halo site has been paired success', Click [OK] (6).





Despite following these instructions, you may receive an Error when ‘Connecting’ (5).

If this occurs, contact ps.technical.support@phinsights.org.au at Primary Sense to allow the team to do the required troubleshooting and contact the Halo Support team if required.