



MedicalDirector®

PKI Certificate Installation and Renewal
For PracSoft and Blue Chip

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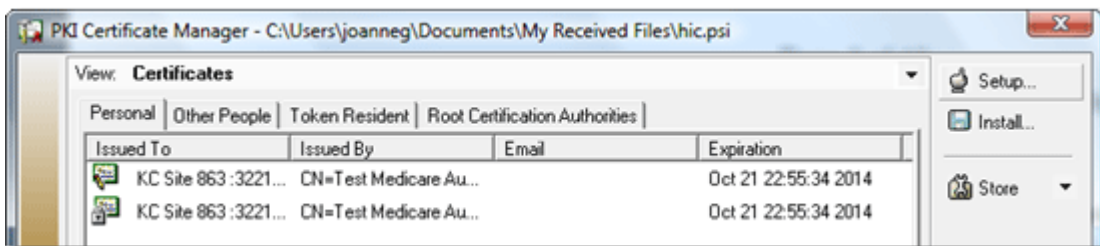
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Installing a Location Certificate

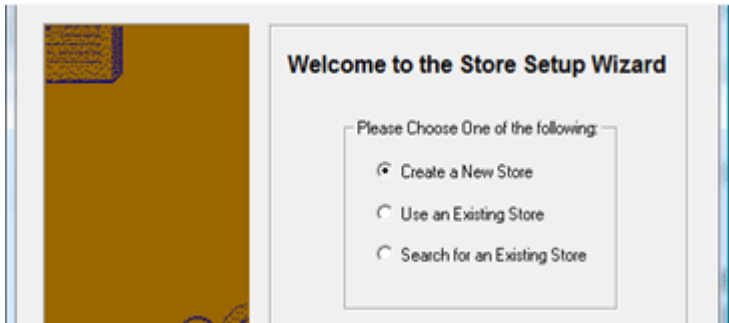
- The following procedure need only be performed on 1 computer.
- The PIC for the location certificate will have been provided to your practice by Medicare Australia in a letter. The PIC is case-sensitive.
- Launch the PKI Certificate Manger via Windows' Control Panel. The PKI Certificate Manager is installed with MedicalDirector PracSoft/Blue Chip.


Create a New Store for your Location (site) Certificate.

- You can search for an existing store if you know you already have one.
- If a Certificate Store has not previously been created on your system, the Store Setup Wizard will automatically launch the first time you run the PKI Certificate Manager. You can manually launch the Store Setup Wizard on subsequent uses of this application by clicking the Setup button on the PKI Certificate Manager main window, as shown below.



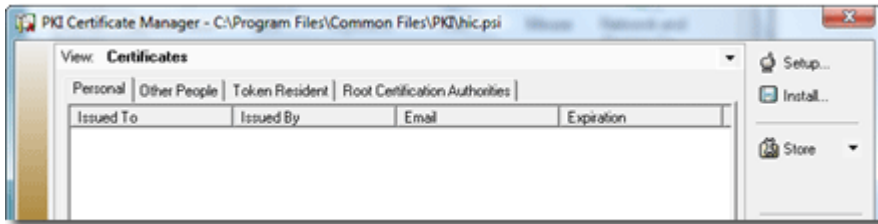
1. Select the **Create a New Store** option (as shown below) and click the **Next** button to continue.



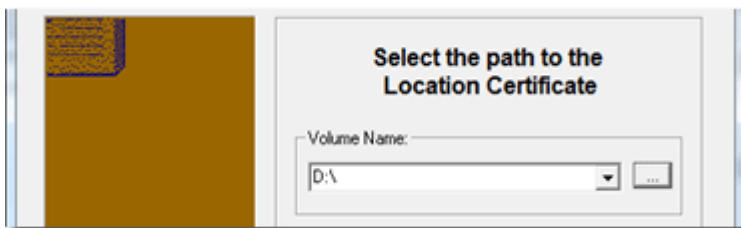
2. You will be prompted to select the store's location. Either:
 - Click the ellipse  button, and browse to the location where you want to store the hic.psi, and then type hic.psi in the file name, or
 - Type in C:\Program Files\Common Files\PKI\hic.psi
3. Click the **Next** button. Enter your preferred password.
 - It is recommended you use your HSS number (Minor ID). Failing that, ensure you make a note of the store password.
4. Click the **Finish** button to create the certificate store.

Installing your Location (site) Certificate into the Store

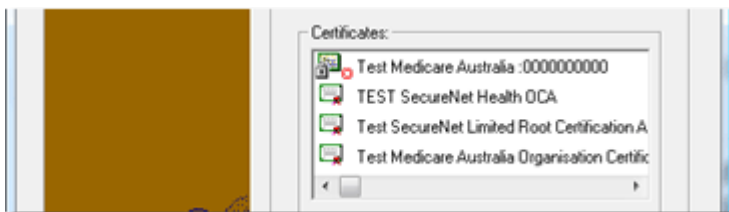
1. To install the location certificates, click the **Install** button.



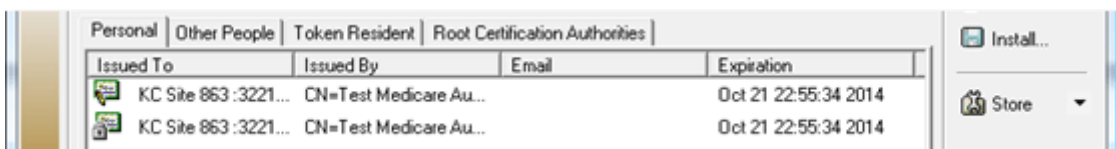
2. Enter the store password you created in step 3 above. Click the **Next** button to continue.
3. The Site Certificate Installation window will appear. Browse to your CD...
 - o By using the drop-down arrow and selecting your drive label e.g. D:\, or
 - o By clicking the ellipse button and browsing to your CD drive.



4. Click the **Next** button.
5. Enter the PIC passphrase supplied by Medicare (this is case-sensitive).
6. Click the **Next** button. Certificates that will be imported into the store window will be displayed.



7. Click the **Finish** button. You will be returned to the PKI Certificate Manager.
 - o The 'Personal' tab should now display 2 Certificates.




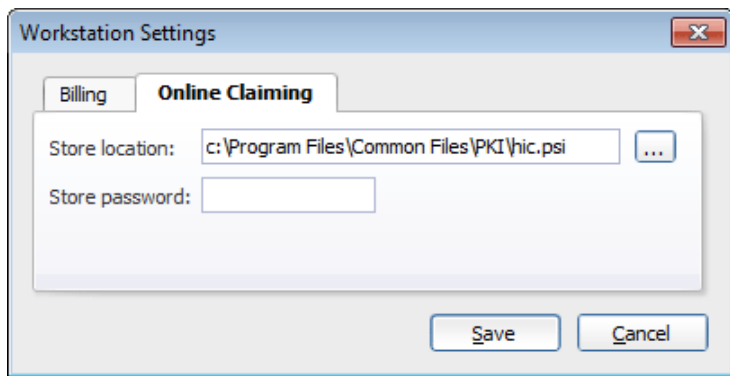
- o The 'Other People' tab should now display four Medicare Certificates.




Configuring Location Certificate Details for PracSoft

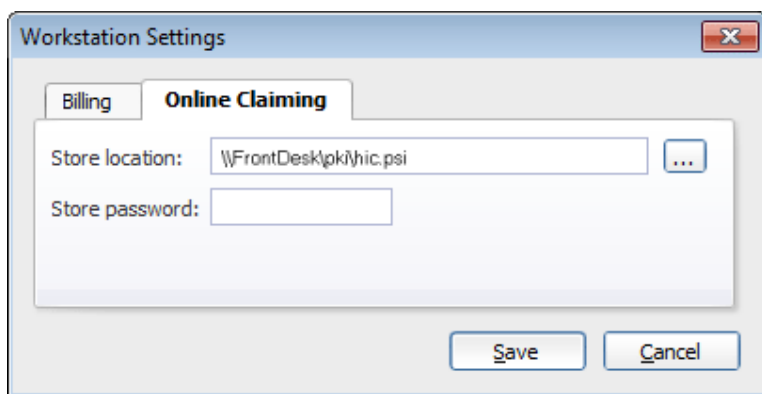
On the Server

1. From the MedicalDirector PracSoft main screen select **Setup > Workstation Settings**.
2. Then either;
 - Click the ellipse  button and browse to the location where you want to store the hic.psi, or
 - Enter 'C:\Program Files\Common Files\PKI\hic.psi' as the Store Location (provided that 'C' is your local system directory/drive).



On the Workstation(s)

1. From the MedicalDirector PracSoft main screen select **Setup > Workstation Settings**.
2. Either;
 - Click the ellipse  button browse to the location of the hic.psi, or
 - Enter '\\SERVER NAME'\PKI\hic.psi.
3. Enter the Store password.
4. Click the **Save** button.

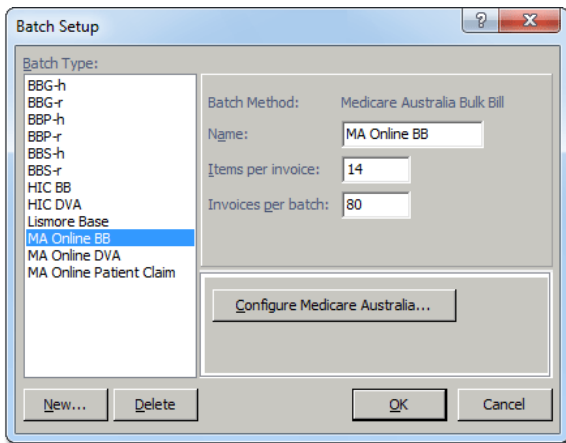


Note: If the hic.psi is not installed in the default location;

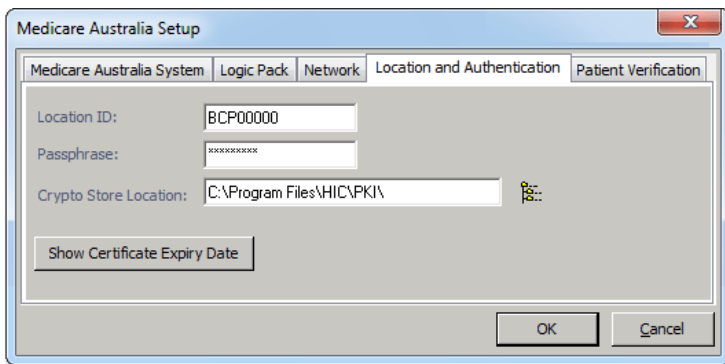
- This location can be found by opening the PKI certificate manager on the server. Check the location at the top of the window in the bar, or
- By searching for the store via the PKI Manager, Store > Search for existing store.

Configuring Location Certificate Details for Blue Chip

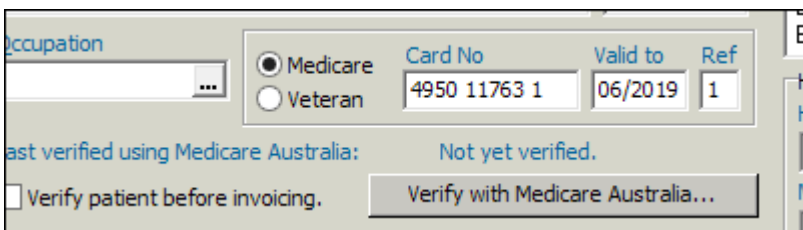
1. Open MedicalDirector Bluechip
2. Select Setup >
3. Select practice
4. Select Batch types
5. Select your Medicare Online Bulk Bill or Eclipse batch type.
6. Click the **Configure Medicare Australia** button.



7. Select the **Location and Authentication** tab.



8. Enter in the passphrase you entered when creating the Store.
9. Open a patient's record in Blue Chip. Locate and click the **Verify with Medicare Australia** button under the Medicare card number for patient.



Update the Location / Personal, and Medicare Certificates

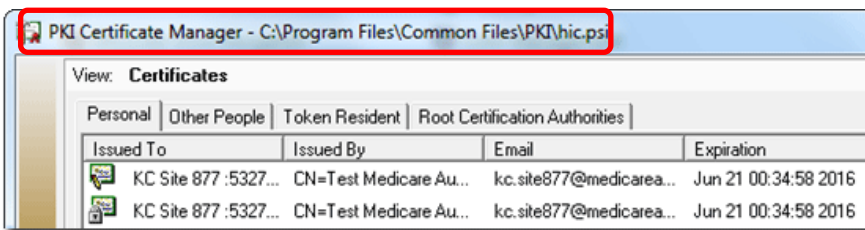
The Personal pane in the PKI Certificate Manager holds the certificates issued to a customer. These certificates can be a combination of Individual, Location and Known Customer.

1. Close MedicalDirector PracSoft and MedicalDirector Clinical on all computers, including the Server.
2. Navigate to the Windows Control Panel via Start > Settings > Control Panel and double-click the PKI Certificate Manager icon.

Select the Current Store Location

Upon opening the PKI Certificate Manager, you may encounter one of the two following scenarios:

Scenario One: If the PKI Certificate Manager *already* knows the location of your PSI Store, the PKI Certificate will load this store automatically.

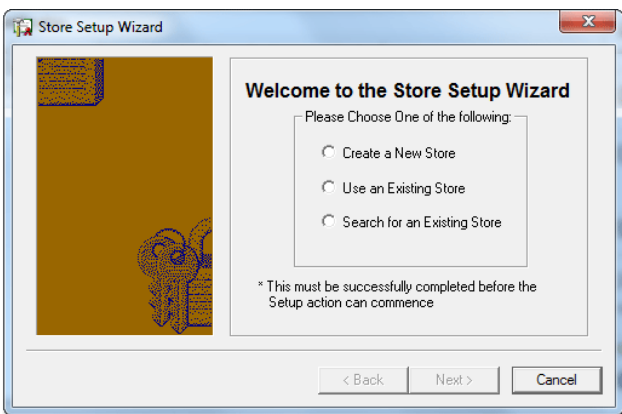


Note: Please check the PSI Store Location listed on the title bar. As an example, in the screenshot above, the Store location would be: *C:\Program Files\Common Files\PKI\hic.psi*. If you are unsure of the Store location, please consult the information outlined above. Proceed to the next step (*Import the Location / Personal PKI Certificates*) if the location listed is correct.

If the location listed is **not correct**:

- a. Click the Setup button and proceed to Scenario Two (below).
- b. If you are unsure of the Store Location, go into MedicalDirector PracSoft > Setup > Workstation Settings, confirm the store location and close MedicalDirector PracSoft.

Scenario Two: If you are opening the PKI Certificate Manager for the first time or need to specify a new store location, you will need to select your current PSI Store location. The following prompt appears:

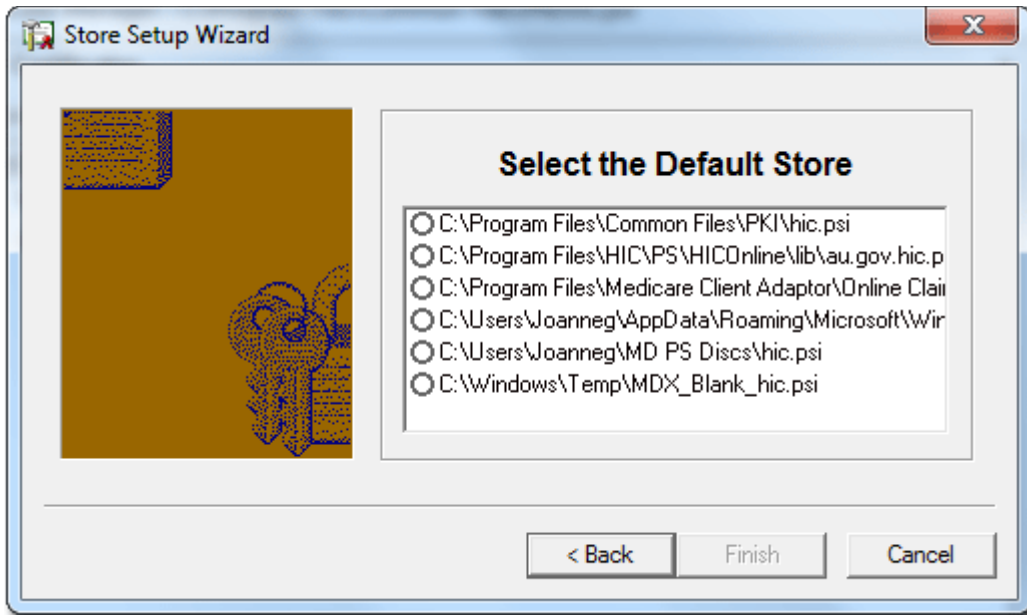


The recommended options are to either:

- a. **'Use an Existing Store'**. This option will ask you to browse to the **PSI Store** (the location of the certificate database); you will need to know where the store is located in order to browse to it. Or,
- b. **'Search for an Existing Store'**. This option will attempt to search your computer automatically for a PSI store. If you choose this option, you will then be prompted to select the drive letter you wish to conduct a search on

and click the **Next** button to conduct the search. From the search results returned, select the store location you wish to use and click the **Finish** button to confirm.

Note the default PSI Store location is C:\Program Files\Common Files\PKI\hic.psi

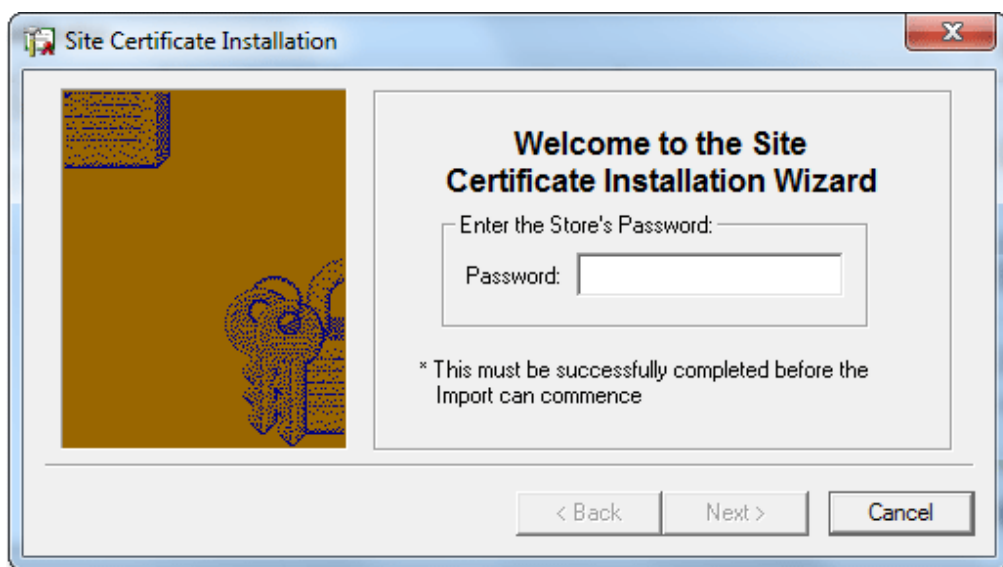


Once you have found and selected the PSI store, the PKI Certificate Manager will remember this location. The next time you open the PKI Certificate Manager in the Control Panel it will automatically know where your PSI Store is, and will not ask you to locate it again.

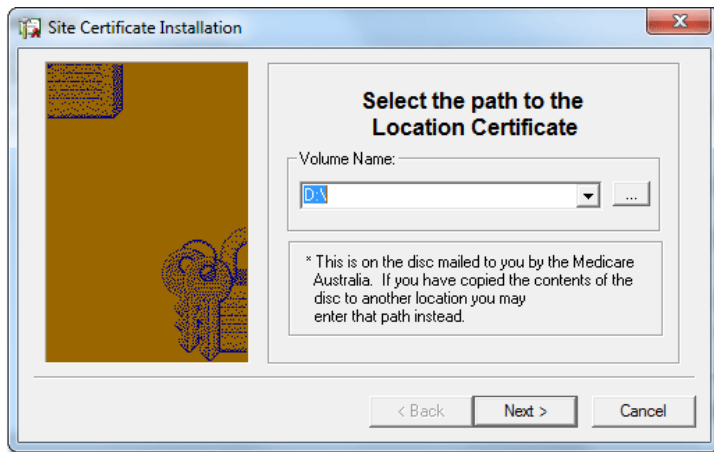
Import the Location / Personal Certificate

To import the location / personal certificate through the PKI Certificate Manager:

1. Once the PKI Certificate Manager is open, click on the Install button.
2. You will be prompted for your Store password. The Store password was first set when installing the certificates.



3. Select the location of the HIC certificates. If you are installing the certificate from a CD, please change the drive to the appropriate drive letter, i.e. D:\.

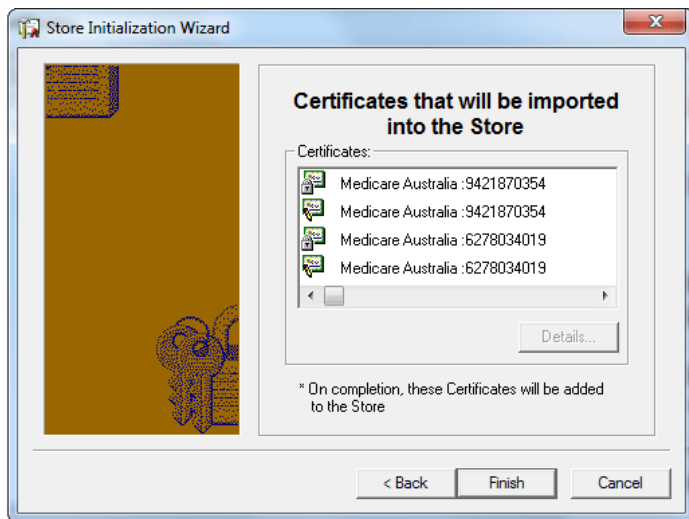


4. Enter the new PIC passphrase.
5. You will be presented with a list of certificates that will be imported. Click the **Finish** button to continue.

Import the Medicare Australia PKI Certificates

If you have successfully navigated to your PSI Store, you should be presented with a window similar to the following. This image indicates that the PKI Certificate Manager has already located the PSI store.

1. Once the PKI Certificate Manager is open, click the **Store** button and select 'Initialise Defaults'.
2. You will be prompted for your Store password. The Store password was first set when installing the certificates.
3. You will be presented with a list of certificates that will be imported. Click the **Finish** button to continue.



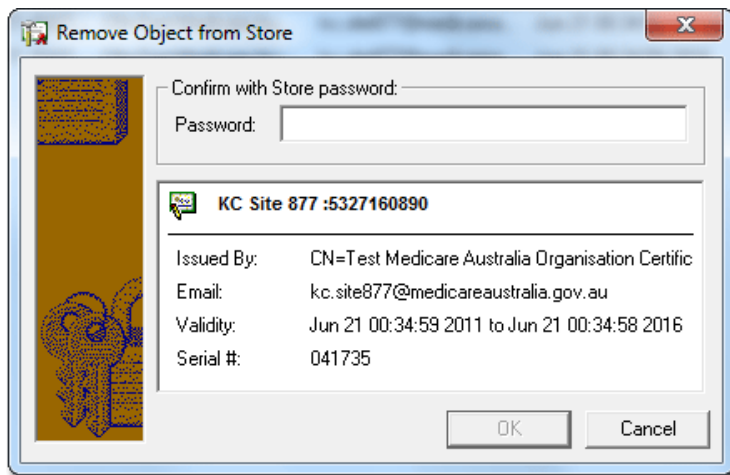
4. After these certificates have been imported, you should be able to see two Medicare Australia certificates, plus two Catherine Argall certificates under the Other People tab (below). This confirms that you have completed this task successfully.

IMPORTANT NOTE: Before resuming your online transmissions, reopen MedicalDirector PracSoft to ensure you are using the certificates that have just been imported into the store.

Delete the Old Certificate

When you import the new certificate, the update process does not delete the old certificate due for expiration. When trying to send claims to HIC or trying to conduct OPV checks, a message appears suggesting the certificate has expired and won't allow claims to be processed. These expired certificates will need to be manually removed.

1. Within the Windows Control Panel, open the PKI Certificate Manager. You should see the new Medicare Australia certificates, and *old* certificates (Catherine Argall) under the Personal tab.
2. Select the certificate to be removed.
3. Click the Tools button, and select **Remove**.
4. You will be prompted for the Store Password.



5. Click the **OK** button to remove the expired certificate.

To test a successful certificate renewal in MedicalDirector PracSoft, select and right-click a Patient from the Waiting Room, and perform an **OPV Check**.

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