

PrimaryCare Sidebar® Prompts Panel

User Guide
Version 4-0

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Contents

1	INTRODUCTION	4
1.1	PRIMARYCARE SIDEBAR®	4
1.2	PROMPTS	4
1.3	RELEVANT DOCUMENTS	5
1.4	INTENDED AUDIENCE	6
1.5	GLOSSARY OF TERMS	6
2	SYSTEM REQUIREMENTS	7
2.1	CLINICAL DESKTOP SYSTEM COMPATIBILITY	7
2.2	CLINICAL BILLING SYSTEM COMPATIBILITY	7
3	INSTALLATION	8
4	PROMPT BUBBLE	9
4.1	VIEW THE PROMPT BUBBLE	9
4.2	OPEN THE PROMPT BUBBLE	9
4.3	CLOSE THE PROMPT BUBBLE	9
4.4	VIEW PROMPT DETAILS FROM THE PROMPT BUBBLE	10
5	PROMPTS PANEL	11
5.1	VIEW A PROMPT	11
5.1.1	Expand/contract a prompt group	12
5.1.2	View prompts by status	12
5.2	PROMPT SLIDEOUT	13
5.2.1	Status section	13
5.2.2	Activities section	14
5.2.3	Detail / Additional Information section	15
5.2.4	History / Event History section	15
5.3	PROMPT GROUP FULL VIEW SCREEN	16
5.3.1	Open Prompt Group to Full View	16
5.3.2	View a Prompt's details	17
5.4	PROMPTS PREFERENCES	18
5.4.1	Open Prompts Preferences	18
5.4.2	Display prompt groups	18
5.4.3	Hide groups when empty	19
5.4.4	Display Prompt Bubble	19
5.4.5	Change the order of Prompt Groups	20
6	CAT PROMPTS	21
7	MBS PROMPTS	22
7.1	STATUS	23
7.2	ACTIVITIES	24
7.3	ADDITIONAL INFORMATION	24
7.4	EVENT HISTORY	24
8	TROUBLESHOOTING	25

1 Introduction

1.1 PrimaryCare Sidebar®

Pen Computer Systems Pty Ltd (PCS) have developed the PrimaryCare Sidebar® as an adjunct to the GP Clinical Desktop System to deliver useful tools and decision support information for the primary care sector at the point of care.

The Sidebar sits on the right of the screen (by default) and contains a series of panels, each with links to a range of primary care software tools. The panels allow the tools to be grouped into logical areas of health care.

This document assumes that the Sidebar has been installed and the user has been registered.

1.2 Prompts

The Prompts panel available via the Sidebar is designed to provide decision-support at the point of care by delivering useful patient-specific alerts to general practice. The Prompts panel requires a patient to be selected in a compatible clinical desktop system to function.

The Prompts available are:

Accept prompt

The Australian Chlamydia Control Effectiveness Pilot undertaken by the University of Melbourne in collaboration with PCS & USAP. The GP will receive a Chlamydia Testing Prompt at patient consult where the patient meets the test criteria.

Cancer Screening prompts

Cancer Screening prompts provide targeted point of care prompting to notify clinicians of patients who meet identified criteria for the screening of Cervical Cancer, Breast Cancer and Colorectal Cancer.

MBS Items prompts

MBS Prompts are proactive real-time prompts focusing on the completion and claiming of MBS items relating to chronic disease management. The prompts are triggered using both clinical and billing system information.

HealthTracker – CVD prompts

The George Institute for International Health have been involved in the development of a electronic decision support (EDS) tool to assist primary care providers in the management of cardiovascular risk. CVD Prompts provide real-time prompting during consultation via the PrimaryCare Sidebar® for patient cohorts identified at risk of CVD.

STI eTest prompts

An electronic STI Assessment Tool to support General Practices in the identification, screening and follow up of patients at risk of STI's. The Prompts panel provides the practice with real-time STI prompting to target patients for STI assessment or STI testing follow-up.

CKD Risk prompts

Provides targeted point of care prompting, which notify clinicians of patients who meet risk criteria for early identification of kidney disease.

PCS Clinical Audit Tool® (CAT) prompts

Prompts are generated by reading the open patient record in your clinical desktop system and notifying you of any required follow up activities based on lists generated in CAT.

CAT is licensed separately to the Sidebar and may be available to your practice at no cost through your local Division or Medicare Local. To find out more about how to obtain a license for CAT visit www.clinicalaudit.com.au/get.

Note: ACCEPt, STI eTest and Healthtracker - CVD prompts are functions of specific pilot projects. Only practices involved in these specific projects will have access to these prompts.

1.3 Relevant Documents

PrimaryCare Sidebar® Installation and Setup User Guide

This User Guide provides instructions on how to install and configure the Sidebar.

PrimaryCare Sidebar® Registration User Guide

This User Guide provides instructions on how to register for Sidebar.

PrimaryCare Sidebar® User Guide

This User Guide describes the basic functions of the Sidebar.

These guides are available from <http://help.pencs.com.au/primarycaresidebar.htm>

PCS Clinical Audit Tool® Accept Prompts User Guide

This User Guide describes how the Accept prompt works.

PrimaryCare Sidebar® HealthTracker CVD User Guide

This User Guide describes how the HealthTracker - CVD prompts work.

PrimaryCare Sidebar® Cancer Screening Quick Reference Guide

This QRG describes how the Cancer Screening prompts work.

PrimaryCare Sidebar® CKD Management Quick reference Guide

This QRG describes how the CKD Management prompts work.

'PCS Clinical Audit Tool® CAT Prompts User Guide'

This User Guide describes how to setup prompts for display in the Sidebar via CAT.

These guides are available from <http://help.pencs.com.au/prompts.htm>.

1.4 Intended Audience

This document is for all users of the Sidebar Prompts software tool.

1.5 Glossary of Terms

Term	Definition
Accept	Australian Chlamydia Control Effectiveness Pilot
BP	Best Practice Clinical Desktop System
CAT	PCS Clinical Audit Tool®
GP	General Practitioner
HCN	Health Communication Network Ltd
Help Desk	PCS Help Desk
CKD	Chronic Kidney Disease
CVD	Cardiovascular Disease
MBS	Medicare Benefits Schedule
MD	Medical Director Clinical Desktop System, developed by HCN
PCS	Pen Computer Systems Pty Ltd
PrimaryCare Sidebar®	A windows dashboard hosting a suite of tools for primary healthcare professionals; developed by PCS
Sidebar	PrimaryCare Sidebar®

Table 1. Glossary of terms used

2 System Requirements

The minimum and recommended system requirements to run the Sidebar, the platform for the Prompts software, are provided in the **PrimaryCare Sidebar® Installation and Setup User Guide**.

2.1 Clinical Desktop System Compatibility

The Prompts software tool is compatible with the following clinical systems:

- Medical Director Version 3
- Best Practice

2.2 Clinical Billing System Compatibility

The MBS Prompts feature requires you to have a compatible clinical billing system installed:

- PracSoft
- BP Management

The details of your clinical billing system can be configured via the Sidebar Clinical System Options screens. Please refer to the **PrimaryCare Sidebar® Installation and Setup User Guide** for further information.

3 Installation

Please refer to the **PrimaryCare Sidebar® Installation and Setup User Guide** and follow the installation instructions.

It is recommended that the following tools are also installed during installation:

- Assessments Panel (for completing activities associated with MBS Items, CVD Assessments)
- CAT (for CAT Prompt setup)
- Quick Links (for easy access to CAT)

The Prompts panel will be displayed once you have logged into the Sidebar (Figure 3A).

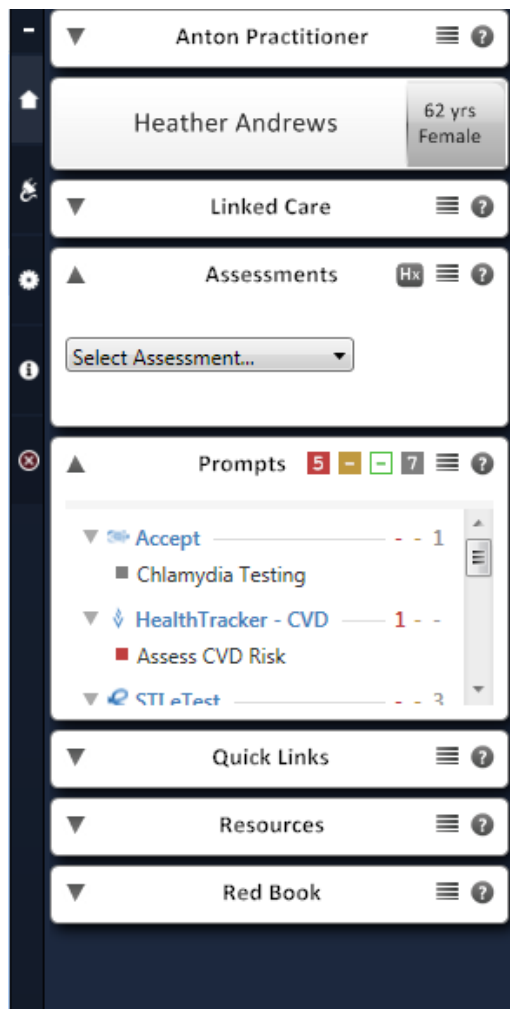


Figure 3A: Sidebar

4 Prompt Bubble

The Prompt Bubble will display only active/outstanding prompts that meet the prompt criteria. As a default the Prompt Bubble will disappear from view after a short time period.

4.1 View the Prompt Bubble

The Prompt Bubble will automatically display at the bottom right of your screen when you open a patient in your clinical desktop system, provided prompts are available for the selected patient.

The displaying of the Prompt Bubble and the length of time the bubble is displayed can be configured, see [Display Prompt Bubble](#).

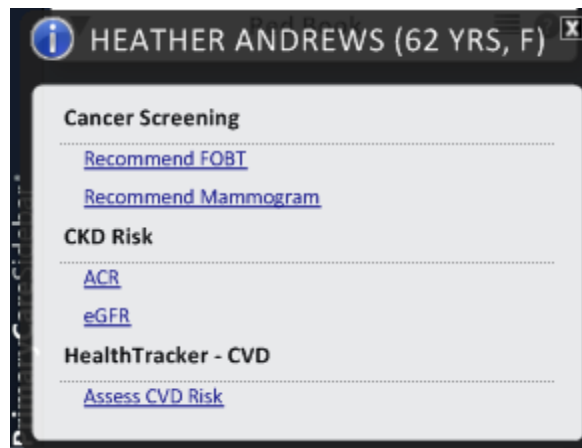


Figure 4.1.1A: Prompt Bubble

4.2 Open the Prompt Bubble

The Prompt Bubble may be viewed at any time. To open the Prompts Bubble, click the Notification icon displayed in your toolbar:



Figure 4.1.2A: Prompt Notification icon

4.3 Close the Prompt Bubble

To close the Prompt Bubble, click the icon (top right).

4.4 View Prompt Details from the Prompt Bubble

Individual prompts may be opened and viewed from the Prompt Bubble. To open and view a prompt from the Prompts Bubble, click on any link:



Figure 4.1.4A: Link to open a Prompt

The Prompt's full view screen will open with the selected prompt displayed:

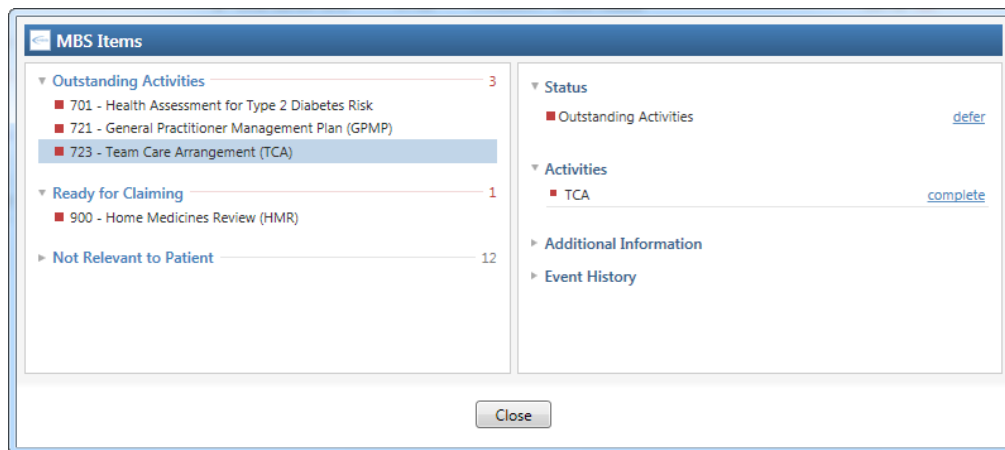


Figure 4.1.4B: Prompts Full View Screen

You can respond to the prompt by selecting an action link on the right-hand side (e.g. defer, complete).

5 Prompts Panel

5.1 View a Prompt

The Prompts panel displays individual prompts under their group heading. Within each prompt group, prompts will be ordered by status:

- Red = Active / Outstanding
- Amber = Deferred / Scheduled
- Green = Completed / Up to date
- Grey = Not Relevant / Cancelled

An icon will display to the left of each prompt indicating status:

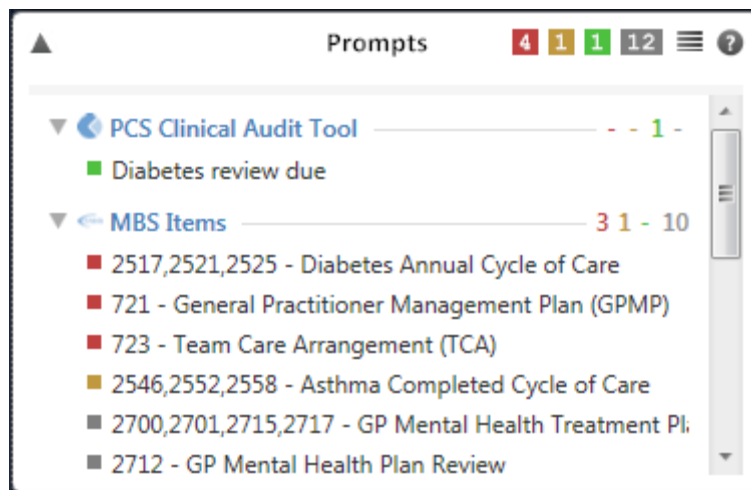


Figure 5.1A: Prompts Panel

Coloured counters to the right of each prompt group heading indicate the number of prompts per status within that group.

Prompt groups that are empty (i.e. do not contain any prompts) will be disabled. Once these groups contain a prompt, the group name will be enabled. Showing groups when they are empty is configurable, see [Hide groups when empty](#).

5.1.1 Expand/contract a prompt group

To expand a Prompt group section and display its prompts:

1. Click the contracted icon next to the Prompt group heading:

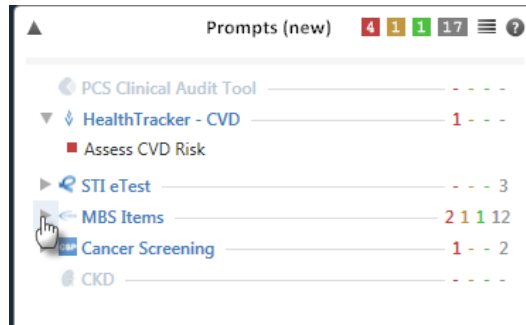


Figure 5.1.1A: Prompt group - contracted

2. The individual prompt names will display, ordered by status types:

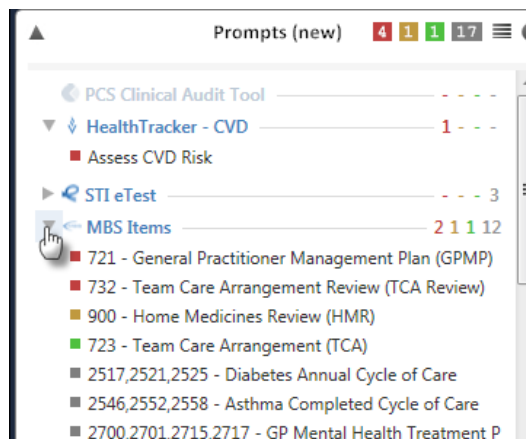


Figure 5.1.1B: Prompt group - expanded

To contract a Prompt group section and hide its prompts, click the expanded icon ▼ to the left of the Prompt group heading. The group will contract and the individual prompts will be hidden.

5.1.2 View prompts by status

Prompts displayed in the panel may be filtered by using the status icon toggle filters located within the Panel heading. Multiple status types can be viewed at the same time and any combination is possible. The number of prompts that currently have that status are displayed within the icon.



Figure 5.1.2A: Sample status filter configuration 1

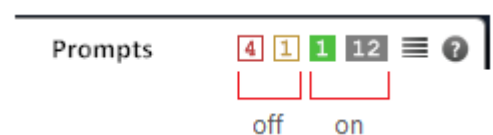


Figure 5.1.2B: Sample status filter configuration 2

5.2 Prompt Slideout

The Prompt Slideout displays the details of your selected prompt. You can also respond to a prompt from the slideout.

To view the details of a Prompt within the slideout, hover your mouse over the prompt in the Prompts panel. The slideout will appear to the left of the Sidebar (Figure 5.2A).

Each section within the slideout can be expanded/collapsed using the arrows to the left of the section heading.

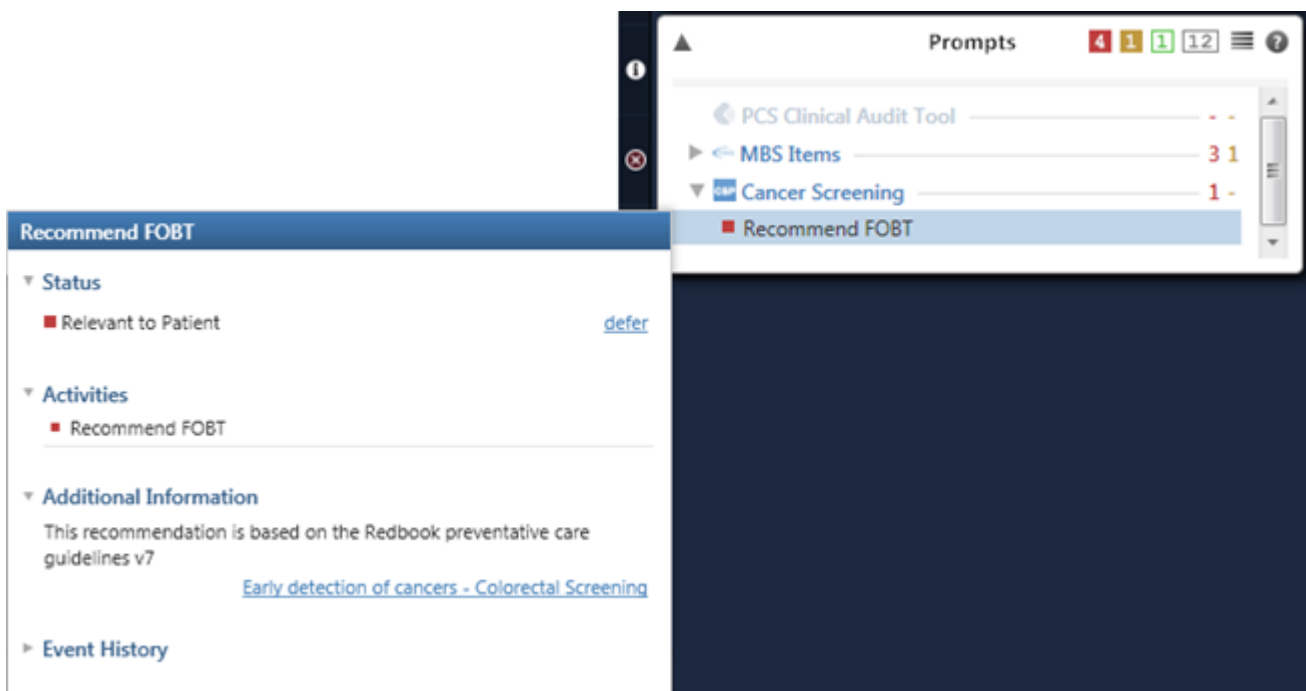


Figure 5.2A: Prompt Slideout

5.2.1 Status section

The status section will show the status of the prompt. The status text will vary depending on the type of prompt you select.

The status section allows the following actions:

- **Defer a prompt**

An Active or Scheduled prompt may be deferred until a later date. Once deferred, the prompt will have an Amber status and will not appear in the Prompt Bubble. The prompt will be reactivated once the *Defer Until* date is met.

Once you select to 'defer', you will be prompted to enter a defer until date (Figure 5.2.1A). This date defaults to 3 months. You can edit the date by manually typing over it; or by selecting the 1 day, 3 month, 6 month or 1 year deferral options. The activity will be recorded in the History section.

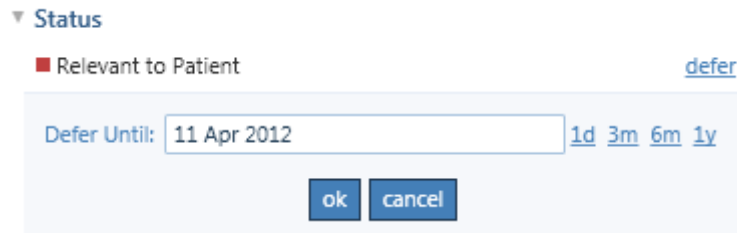


Figure 5.2.1A: Defer Prompt section

- **Resume a prompt**

To resume the prompt prior to its deferred date, select the [resume](#) option in the status section. The status will revert back to Active / Outstanding and the activity will be recorded in the History section (Figure 5.2.1B).



Figure 5.2.1B: Resume option on a deferred prompt

5.2.2 Activities section

The Activities section lists the actions you need to take to complete the prompt. An activity can have an Outstanding status (red) or a Completed status (green).

The process for completing a prompt varies depending on the type of prompt. Some activities will have the option of both manual and automatic completion (via the clinical desktop system). This is activity specific. Completing all activities will usually change the status of the prompt.

- **Manually complete a prompt activity**

Prompt activities that can be manually completed will have a 'complete' option displayed to the right of the activity.

Once you select the 'complete' option, you will be prompted to enter a recorded date (Figure 5.2.2A). This date defaults to today. You can edit the date by manually typing over it. The activity will be recorded in the History section. The activity status will update to complete (Figure 5.2.2B).

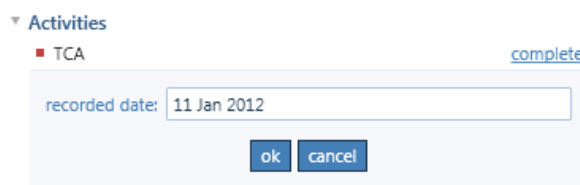


Figure 5.2.2A: Activity recorded date



Figure 5.2.2B: Completed activity

- **Automatically complete a prompt activity using Clinical System data**

Note: Prompt activities that can only be automatically completed will not have a 'complete' option displayed to their right.

To complete an activity by updating the patient record, enter the required patient data directly into the clinical desktop system. The prompt will refresh using the modified clinical system data, and the activity will be updated to complete (Figure 5.2.2C).

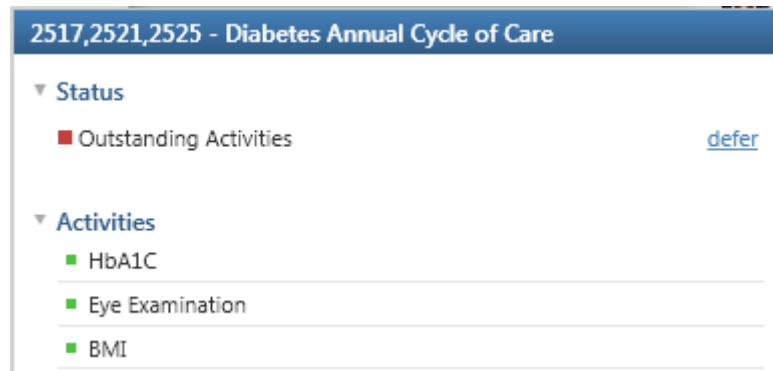


Figure 5.2.2C: Activities completed via the patient record

- **Automatically complete a prompt activity using Sidebar data**

To complete an activity using Sidebar data:

1. Select the link in the Activities section. A Sidebar function will open

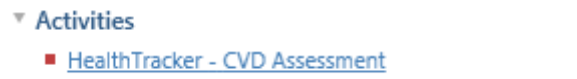


Figure 5.2.2D: Activities completed via the Sidebar

2. Complete the function (In this example it is a HealthTracker – CVD Assessment available from the Assessments panel)
3. The prompt will refresh using the modified Sidebar patient data. The activity will update to complete

5.2.3 Detail / Additional Information section

The Detail / Additional Information section will usually display a description of the prompt and any relevant resource links.

5.2.4 History / Event History section

The History / Event History section will log all relevant prompt activity.

5.3 Prompt Group Full View screen

The Prompts full view screen will list all prompts in a Prompt group.

5.3.1 Open Prompt Group to Full View

To open the Prompt group full view screen, click on a Prompt Group heading in the Prompts panel (Figure 5.3.1A):

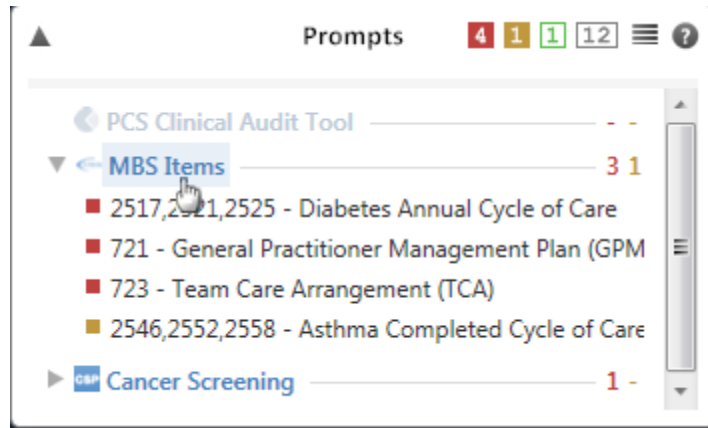


Figure 5.3.1A: Open full view

The Prompts Full View screen opens displaying the selected group's prompts (Figure 5.3.1B). Prompts are grouped by status:

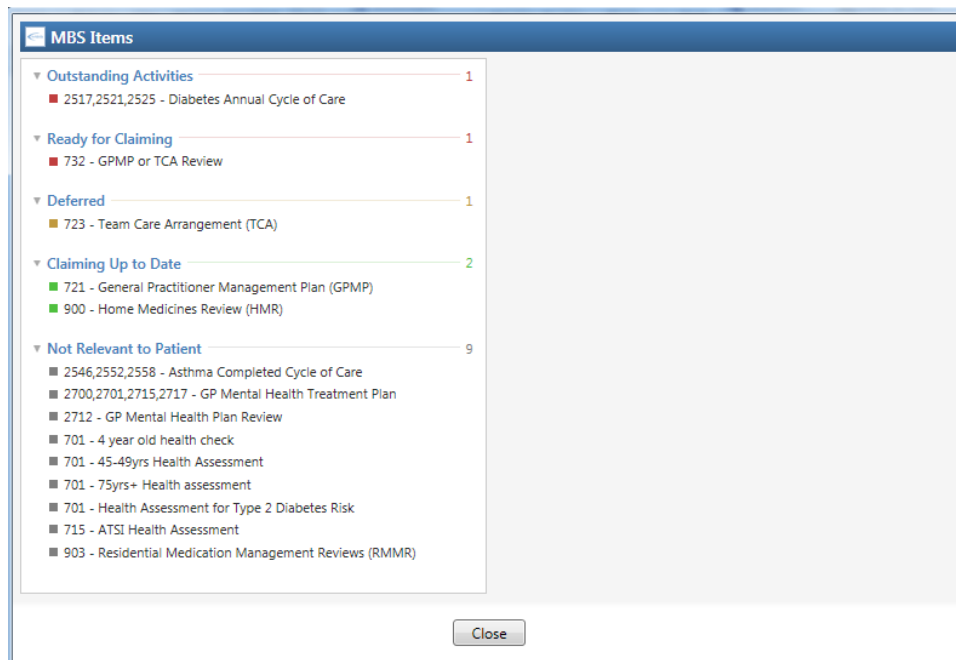


Figure 5.3.1B: Prompt group full view

The Prompts Full View screen can also be opened from the Prompt Bubble, refer to [View Prompt Details from the Prompt Bubble](#).

5.3.2 View a Prompt's details

To view the details of a prompt, select the prompt in the left of the screen. The contents of the prompt will display in the right side of the screen (Figure 5.3.2A). You may action the prompt as per normal.

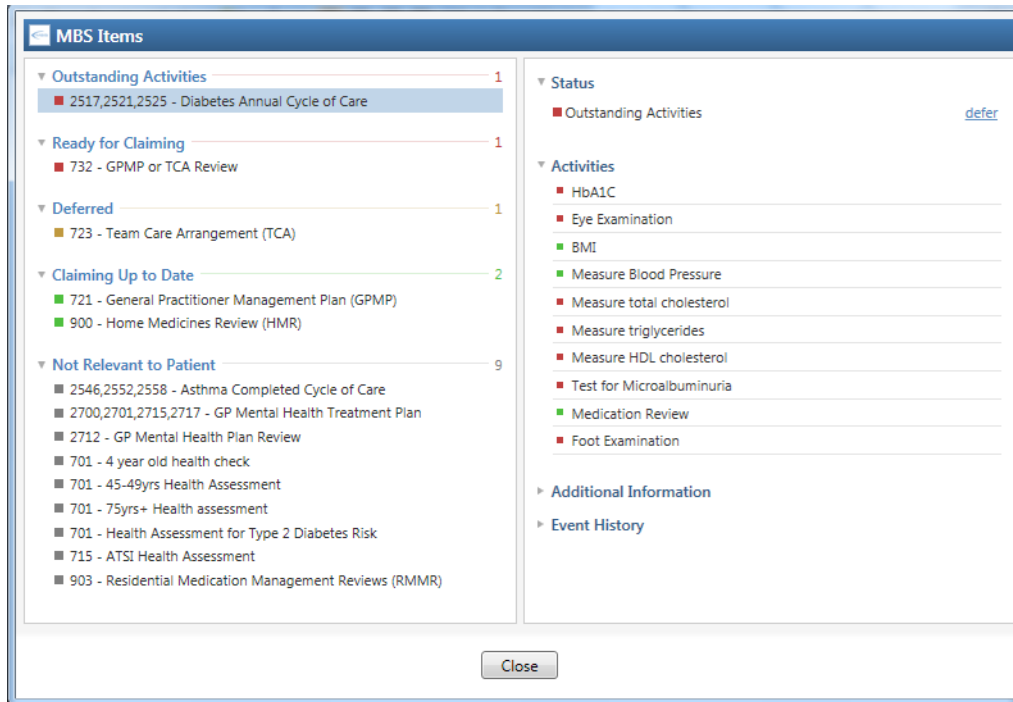



Figure 5.3.2A: Full View screen - Prompt details

5.4 Prompts Preferences

5.4.1 Open Prompts Preferences

To open the Prompts Preferences screen:

1. Click the menu  icon in the Prompts Panel header
2. Select **Preferences** (Figure 5.4.1A)

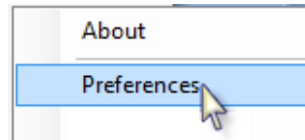


Figure 5.4.1A: Preferences option

The Prompts Preferences screen will open (Figure 5.4.1B):

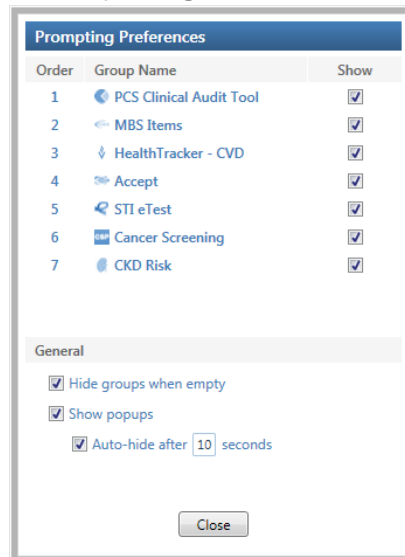


Figure 5.4.1B: Prompts Preferences screen

5.4.2 Display prompt groups

You have the option of choosing which Prompt groups you would like displayed in your Prompts panel and Prompt Bubble.

To hide a Prompt group in the Prompts panel, un-check the corresponding checkbox in the 'Show' column (Figure 5.4.2A). The Prompt group name will be disabled in the Preferences dialog.

Order	Group Name	Show
1	PCS Clinical Audit Tool	<input checked="" type="checkbox"/>
2	MBS Items	<input checked="" type="checkbox"/>
3	Cancer Screening	<input type="checkbox"/>

Figure 5.4.2A: Hide Prompt Group in Panel and Bubble

In the example above the Cancer Screening Prompts will not display in the Prompts panel or the Prompts Bubble.

To display a Prompt group in the Prompts panel, check the corresponding checkbox in the 'Show' column (Figure 5.4.2B).

Order	Group Name	Show
1	PCS Clinical Audit Tool	<input checked="" type="checkbox"/>
2	MBS Items	<input checked="" type="checkbox"/>
3	CSP Cancer Screening	<input type="checkbox"/>

Figure 5.4.2B: Display Prompt Group in Panel and Bubble

5.4.3 Hide groups when empty

You have the option to hide a Prompt group in the Prompts panel and Bubble when the Prompt group is empty.

To hide a Prompt group when empty, select the **Hide groups when empty** checkbox (Figure 5.4.3A). Groups that do not have a prompt for the selected patient will be hidden from view.

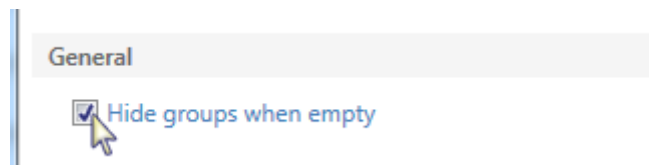


Figure 5.4.3A: Hide Groups

5.4.4 Display Prompt Bubble

To stop the Prompts Bubble appearing, un-check the **Show popups** checkbox in the Preferences **General** section (Figure 5.4.4A):

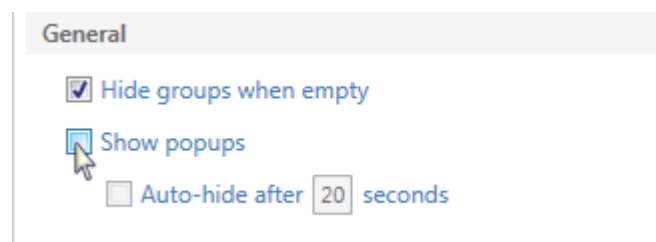


Figure 5.4.4A: Hide Prompt Bubble

The Auto-hide check box will automatically un-check and disable.

To display the Prompts Bubble, check the **Show popups** checkbox (Figure 5.4.4B).

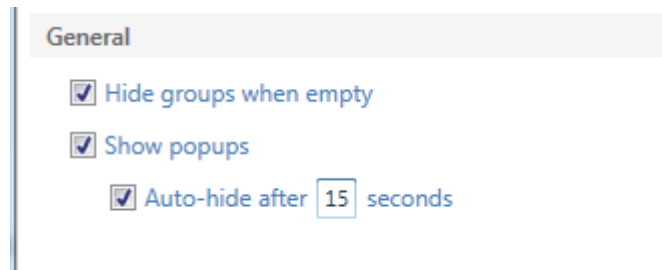


Figure 5.4.4B: Display Prompt Group in Bubble

The Auto-hide check box will re-enable. You can set the Prompt Bubble to automatically hide after a period of time:

1. Check the Auto-hide checkbox (Figure 5.4.4B)
2. Enter a time period in the 'seconds' field. The Bubble will hide after the desired time period

Note: The Prompt Bubble will not appear if there are no active/outstanding prompts for the selected patient.

5.4.5 Change the order of Prompt Groups

The sort order of the Prompt groups in the Prompts panel can be changed.

To move a Prompt group higher in the sort order:

1. Hover over the Prompt group name or Order number. Up and Down arrows will appear (Figure 5.4.5A)
2. Click on the up arrow to move the Prompt group up one position. The change in the sort order will be reflected in the Prompts panel

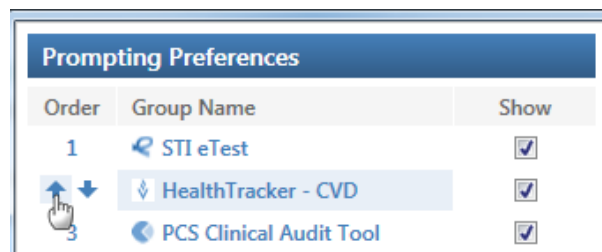


Figure 5.4.5A: Sort Order Arrows

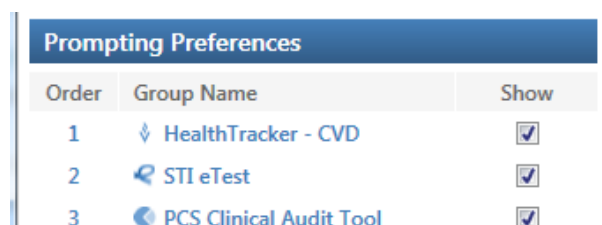


Figure 5.4.5B: Move group up in sort order

To move a Prompt group lower in the sort order, click the down arrow. The Prompt group will move down one position.

6 CAT Prompts

Refer to the **PCS Clinical Audit Tool® CAT Prompts User Guide** for further information on how to setup CAT Prompts.

CAT can be accessed via a shortcut in the Sidebar Quick Links panel.

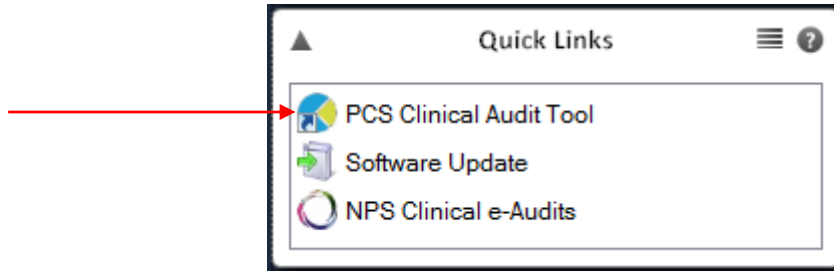


Figure 6A: CAT shortcut in Quick Links panel

7 MBS Prompts

The MBS Prompts feature currently covers a number of MBS Items.

Your Patient's eligibility to these MBS Items is determined by a number of rules residing in the Sidebar. These rules interrogate clinical system data, billing system data and data manually entered into the Prompt to determine the contents and status of a Prompt at any one time.

Once an MBS Item has been claimed, the prompts are designed to retrigger once (if) the patient is again eligible for the MBS Item.

Please note: MBS Prompts cannot determine when an item has been already claimed by another provider as the software does not interface with Medicare. You will need to determine this as per current procedure.

You will need to configure Sidebar with a compatible billing system for MBS Prompts to operate, see [Clinical Billing System Compatibility](#).

7.1 Status

Valid MBS Prompt statuses are:

- Red = Outstanding Activities or Ready for Claiming
- Amber = Deferred
- Green = Claiming Up to Date
- Grey = Not Relevant to Patient or Related Claim Conflict

A description of each MBS prompt status is provided below:



Figure 7.1A: Prompt Statuses

7.2 Activities

Once all prompt care activities have been completed, the prompt status will automatically update to 'Ready for Claiming'.

7.3 Additional Information

The Additional Information section in the Slideout will display a:

- description of the MBS Item;
- link to the MBS Item on the MBS Online website; and
- any additional links relevant to the prompt

7.4 Event History

The Event History section will log all Prompt activity and the date the activity occurred. The activities that will be inserted include when the prompt is:

- Deferred
- Resumed
- When an Item has been claimed in your Billing System
- When the claim has been accepted by Medicare

8 Troubleshooting

For further assistance with the Linked Care panel, please contact the PCS Help Desk on 1800 762 993.