



PCS CLINICAL AUDIT TOOL
USER GUIDE – CAT PROMPTS



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Document History

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0.1	31/12/2008	Christine Chidgey	Initial Document
0.2	14/02/2009	Christine Chidgey	Update terminology to Prompts
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1.0	11/03/2009	Christine Chidgey	Final version for Release
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1.3	19/06/2009	Pamela Scicluna	Review & minor edits
1.4	01/07/2010	Christine Chidgey	Prompts are now compatible with Best Practice as well as Medical Director. A preference folder needs setting.

Table of Contents

INTRODUCTION.....	4
1.1 INTRODUCTION	4
1.2 CLINICAL AUDIT TOOL (CAT).....	4
1.3 CAT PROMPTS	4
1.4 CAT PROMPTS USER GUIDE	5
1.5 RELEVANT DOCUMENTS	5
1.6 INTENDED AUDIENCE	5
1.7 TERMINOLOGY	5
2 SYSTEM REQUIREMENTS	6
2.1 CLINICAL DESKTOP SYSTEM COMPATIBILITY	6
2.2 CLINICAL AUDIT TOOL	6
3 INSTALLATION	7
4 CLINICAL AUDIT TOOL.....	8
5 CAT PROMPTS PREFERENCES.....	9
6 CAT PROMPTS FUNCTIONALITY	10
6.1 SELECTING PATIENTS FOR FOLLOW-UP	11
6.2 CAT PROMPTS HISTORY FROM WITHIN CAT	14
6.3 CANCELLING A CAT PROMPT.....	15
6.4 RESPONDING TO A CAT PROMPT AT PATIENT CONSULT	16
6.5 CAT PROMPTS PATIENT HISTORY	20

Introduction

1.1 Introduction

Pen Computer Systems (PCS) have developed the **PrimaryCareSidebar™** as an adjunct to the GP Clinical Desktop System to deliver useful tools and decision support information for general practice at the point of care.

The **PrimaryCareSidebar™** 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. The Clinical Audit Tool (CAT) Prompts are provided as one of these panels.

This document assumes that the **PrimaryCareSidebar™** has been installed and the user has been registered.

1.2 Clinical Audit Tool (CAT)

The Clinical Audit Tool (CAT) analyses clinical information from GP Clinical Desktop Systems. It translates data into real statistical and graphical information that is easy to understand and action. This allows practitioners to assess and improve the quality and completeness of patient information. The benefit to the practice is to assist with its ongoing accreditation and provide opportunities to grow practice income. The emphasis of the tool is to help practice staff to take specific action to improve patient coverage in chronic disease management and prevention.

Other benefits of CAT are many and include:

- targeting patients with particular needs
- targeting patients with specific health risk profiles
- improved compliance with statistical data collections
- extracting data to meet the needs of others
- meeting reporting requirements

Statistics that are required for the Australian Primary Care Collaboratives (APCC) program and the Department of Health & Ageing (DoHA) Future Directions Key Performance Indicators for Divisions are a by-product of the use of the system.

1.3 CAT Prompts

CAT Prompts provides the practice with the ability to flag targeted patients for follow-up. When a flagged patient presents for consult the GP is prompted by a pop up bubble containing the follow up details.

- CAT provides the functionality to flag targeted patients for follow up.
- The **PrimaryCareSidebar™** provides the pop up prompt functionality when a patient presents for consult.

CAT Prompts is currently only available for Medical Director Users.

1.4 CAT Prompts User Guide

The purpose of this document is to provide instructions on how to install and use the functionality provided by CAT Prompts. It should be used as a supplementary guide to the main user guide: '**Clinical Audit Tool – User Guide**'. Some user instructions in this guide assume a general understanding of how to use CAT. References will be made to the main user guide where necessary.

1.5 Relevant Documents

'Clinical Audit Tool – User Guide'

This User Guide provides instructions on how to install and use the functionality provided by the CAT. It should be available as a prerequisite to this guide and will be referred to throughout this guide where necessary

This guide is available from <http://help.pencs.com.au/cat.htm>.

'Pen Setup Installation and PrimaryCareSidebar™ User Guide'

This guide provides instructions on how to install the **PrimaryCareSidebar™** and the selected primary care software tools that are accessible from it. These tools integrate with the GP clinical desktop system at the point of patient care. One or all of the tools can be selected for installation. The CAT Prompts are one of these **PrimaryCareSidebar™** tools.

This guide is referred to in the System Requirements & Installation sections of this guide.

This guide is available from <http://help.pencs.com.au/primarycaresidebar.htm>.

1.6 Intended Audience

The audience for this document is all users of the **PrimaryCareSidebar™**.

1.7 Terminology

Term	Definition
APCC	Australian Primary Care Collaboratives
CAT	Clinical Audit Tool
Clinical Desktop System	A general term used for the computer program used by a clinician to record patient clinical information
DoHA	Department of Health & Ageing
PCS	Pen Computer Systems
PrimaryCareSidebar™	The PCS sidebar application that links to a range of primary care software tools

2 System Requirements

CAT Prompts requires the installation of the Clinical Audit Tool and the **PrimaryCareSidebar™**. The System Requirements for these are provided in the following user guides:

- **'Clinical Audit Tool – User Guide'**
- **'Pen Setup Installation and PrimaryCareSidebar™ User Guide'**

2.1 *Clinical Desktop System Compatibility*

CAT Prompts is only compatible with:

- Medical Director Versions 2 and 3
- Best Practice

2.2 *Clinical Audit Tool*

CAT Prompts requires a minimum of the Clinical Audit Tool version 2.9.2.

3 Installation

Please refer to 'Pen Setup Installation and **PrimaryCareSidebar™** User Guide' and follow the installation instructions.

CAT Prompts also requires the following applications to be installed:

- Clinical Audit Tool
- Launch Pad

The CAT Prompts panel will be displayed once logged into the **PrimaryCareSidebar™**. The Clinical Audit Tool will be available as a shortcut on the 'Launch Pad'.

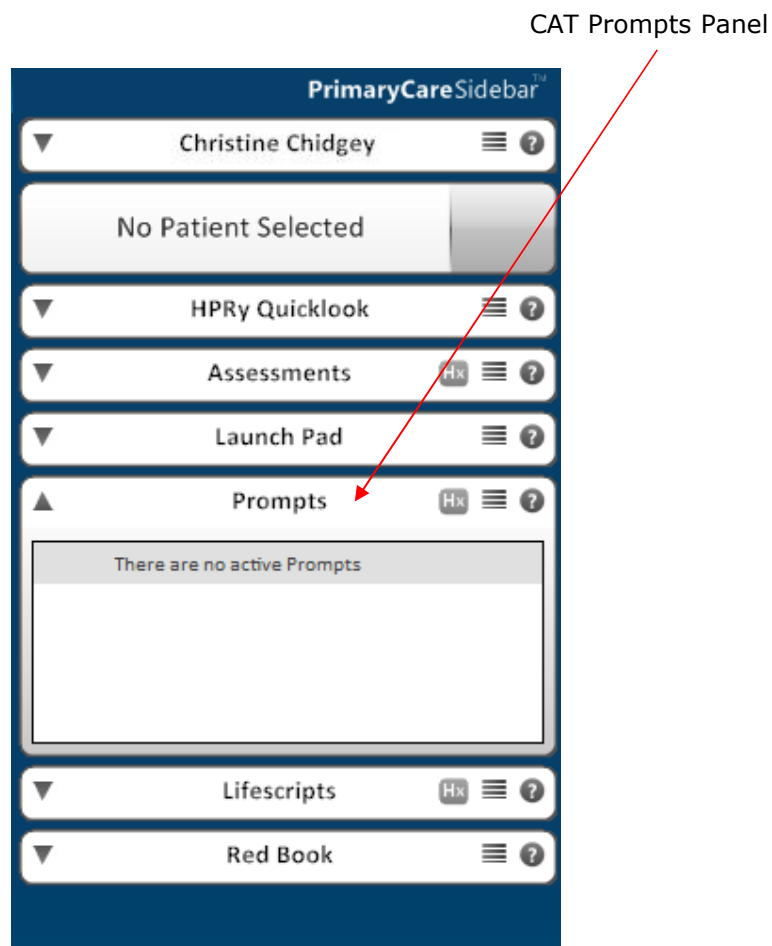


Figure 3A: CAT Prompts Panel

4 Clinical Audit Tool

The Clinical Audit Tool will be available as a shortcut on the 'Launch Pad'.

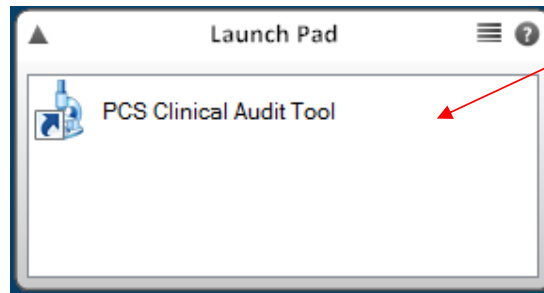


Figure 4A: Launch Pad

- Double-click the CAT shortcut icon to open CAT
- The CAT login screen will open and you will be required to login with your username and password.
 - If you have used your CAT login to register for the **PrimaryCareSidebar™** then you will also use this login to activate CAT.
 - If you have registered for the **PrimaryCareSidebar™** using an alternative username and password then you will need to use this new login to activate CAT.

Once logged in you will see a new menu item on the header toolbar for CAT Prompts.



Figure 4B: CAT 'Prompts' menu item

5 CAT Prompts Preferences

You are required to configure the shared folder location where your patient prompt data will be stored. If this is not configured and you try to use the prompts functionality you will receive an alert with information detailing how to complete the configuration (Figure 5A).

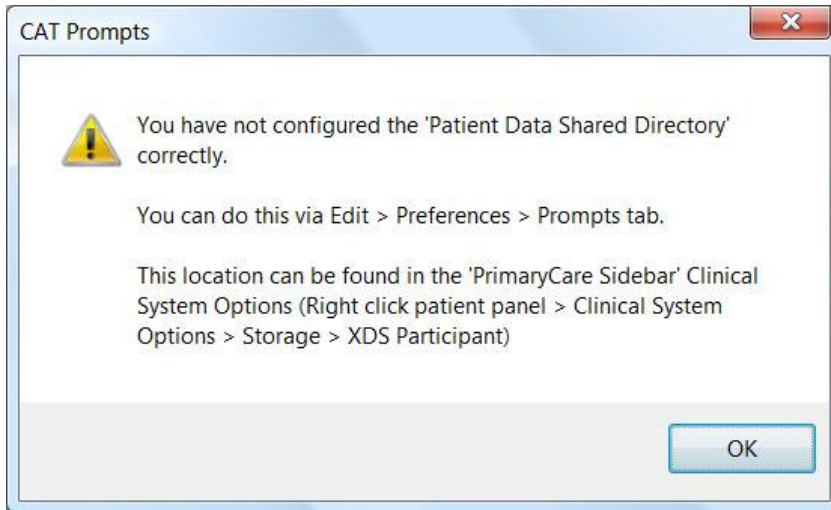


Figure 5A CAT Prompts Alert

To configure the CAT Prompts Preferences

- Open CAT
- Click **Edit > Preferences** menu
- From the **Clinical Audit Preferences** dialog choose the **Prompts** tab (Figure 5B)
 - Click the **Patient Data Shared Directory** Browse button to set the shared folder location
 - You may also choose to change the **Default Prompt Text** that displays when you create a prompt
- Click OK

NOTE: This shared folder location must also be configured in the **PrimaryCareSidebar™** - refer to the 'Pen Setup Installation and **PrimaryCareSidebar™** User Guide' for instructions.

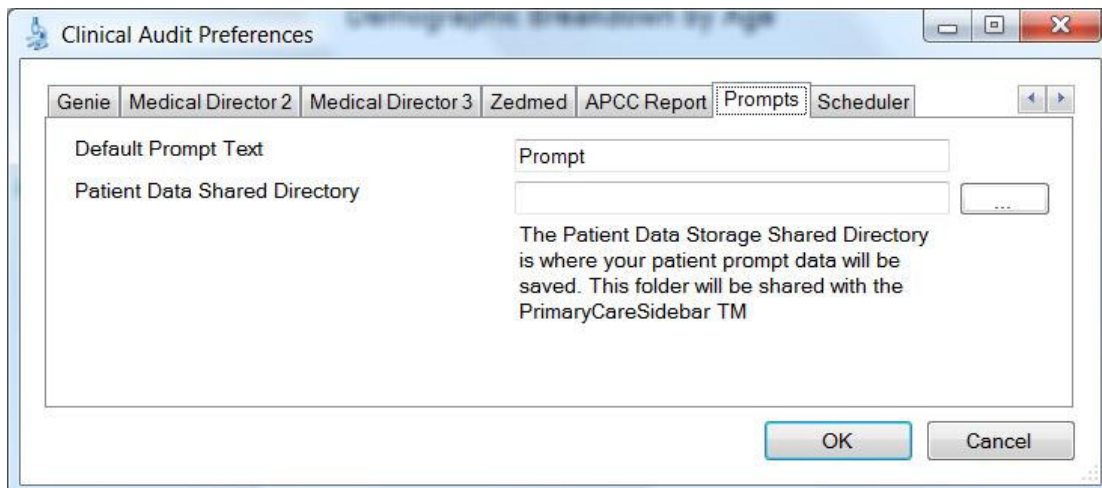


Figure 5B Preferences > Prompts Configuration

6 CAT Prompts Functionality

CAT provides the ability to find patients that meet a set of risk criteria. CAT Prompts provides the ability for this list to generate a patient prompt when a patient on the list presents for a GP consultation.

The steps in the clinician workflow are:

From CAT

1. Identify patient cohort using CAT
2. Flag the patients for follow up at consult

From GP clinical desktop system

1. A Patient record is opened triggering the consult prompt for review

From the **PrimaryCareSidebar**TM

1. The CAT Prompt is actioned by the clinician

6.1 Selecting Patients for Follow-Up

It is assumed the user knows how to use CAT to:

- 1) create and load a data extract from the clinical desktop system, and
- 2) set up a filter to find patients of interest.

Please refer to the '**Clinical Audit Tool – User Guide**' for further information.

The example here will create a follow-up CAT Prompt for Diabetic patients. When they present for consult the clinician will be notified.

1. Login to CAT
2. Load an extract and filter on Diabetes = Yes
3. Click the 'View Pop.' Button
4. The patient 'Reidentify Report' is displayed

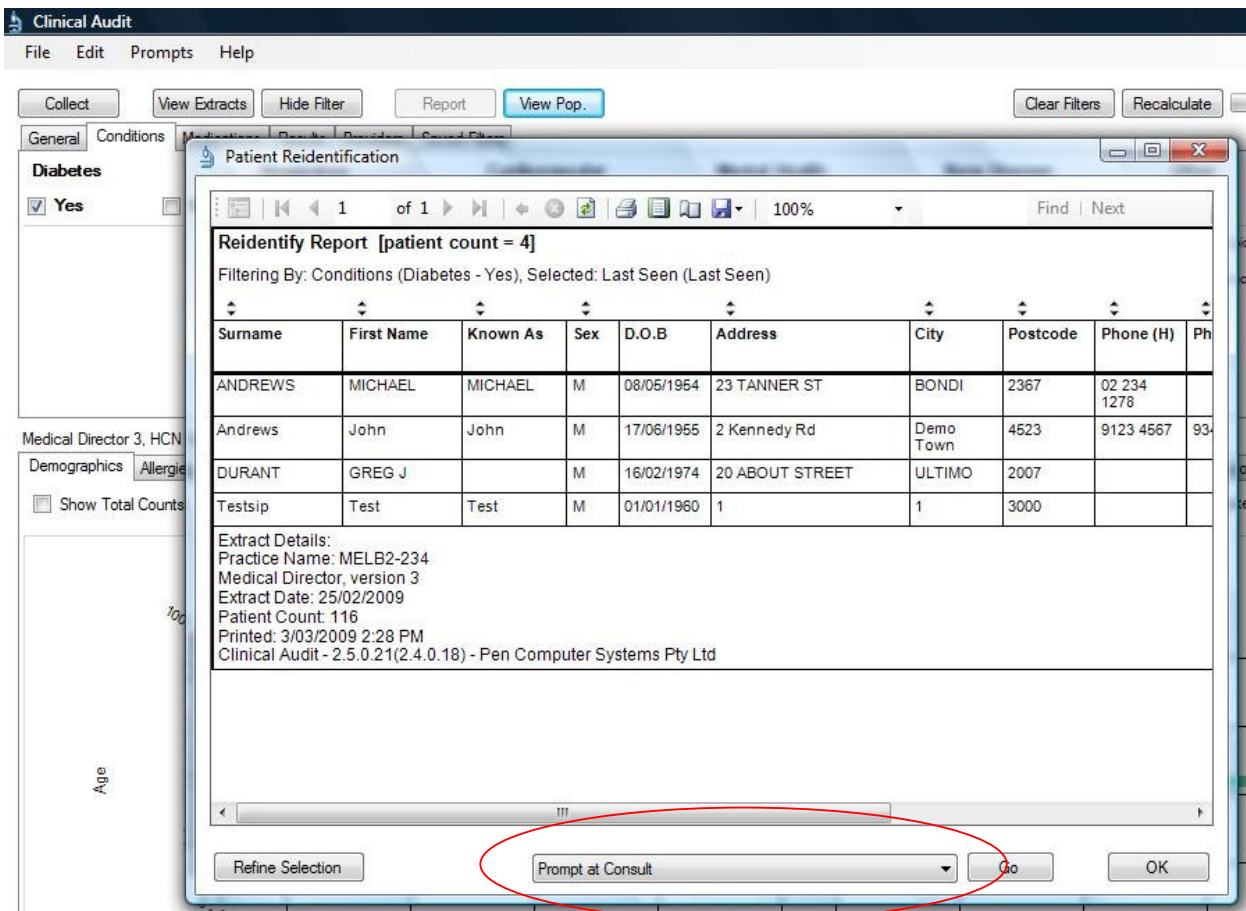


Figure 6.1A: CAT Prompt at Consult option

A new option is available at the bottom of the report: 'Prompt at Consult'. Click the **Go** button

The 'Prompt at Consult' dialogue box appears. This allows the user to set the following prompt details:

- Status Period - select a timeframe before the CAT Prompt becomes active e.g. Prompt at next consult
- Summary - Overtyping the prompt text to insert the text that will appear in the Prompt bubble e.g. DIABETES REVIEW
- Description - this is the patient filter selection used and cannot be changed

Prompt at Consult

Status Period: Prompt at next consult
 Wait 3 Months
 Wait 6 Months
 Wait 12 Months
 Wait 2 Years

Summary:

Description:

OK Cancel

Figure 6.1B: CAT Prompt at Consult dialogue

- Select 'Prompt at next consult' and enter summary text

Figure 6.1C: CAT Prompt at Consult selections

- Click 'OK'

The prompt will be saved.

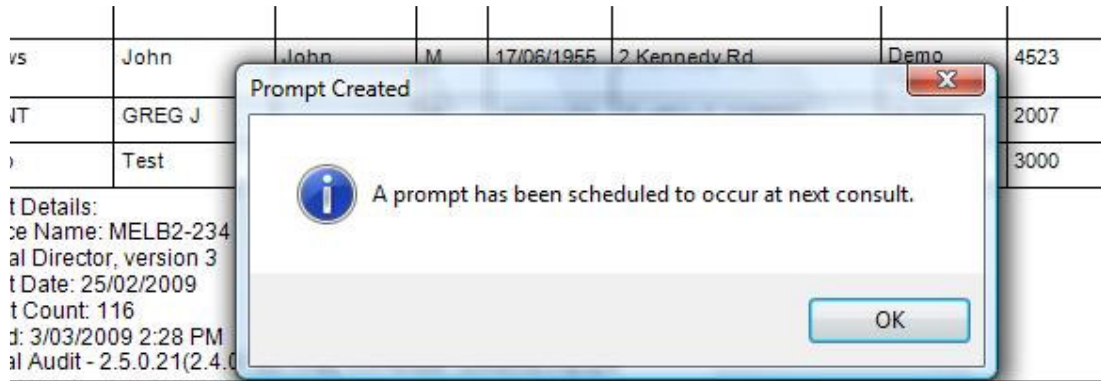


Figure 6.1D: Notification that CAT Prompt is saved

NOTE: You can view the saved CAT Prompt from the 'Prompts' menu item. See next section.

6.2 CAT Prompts History from within CAT

CAT Prompts that have been saved can be reviewed from the 'Prompts' menu item.

- Click the 'Prompts' menu item
- The 'Prompt History' dialogue box will be displayed

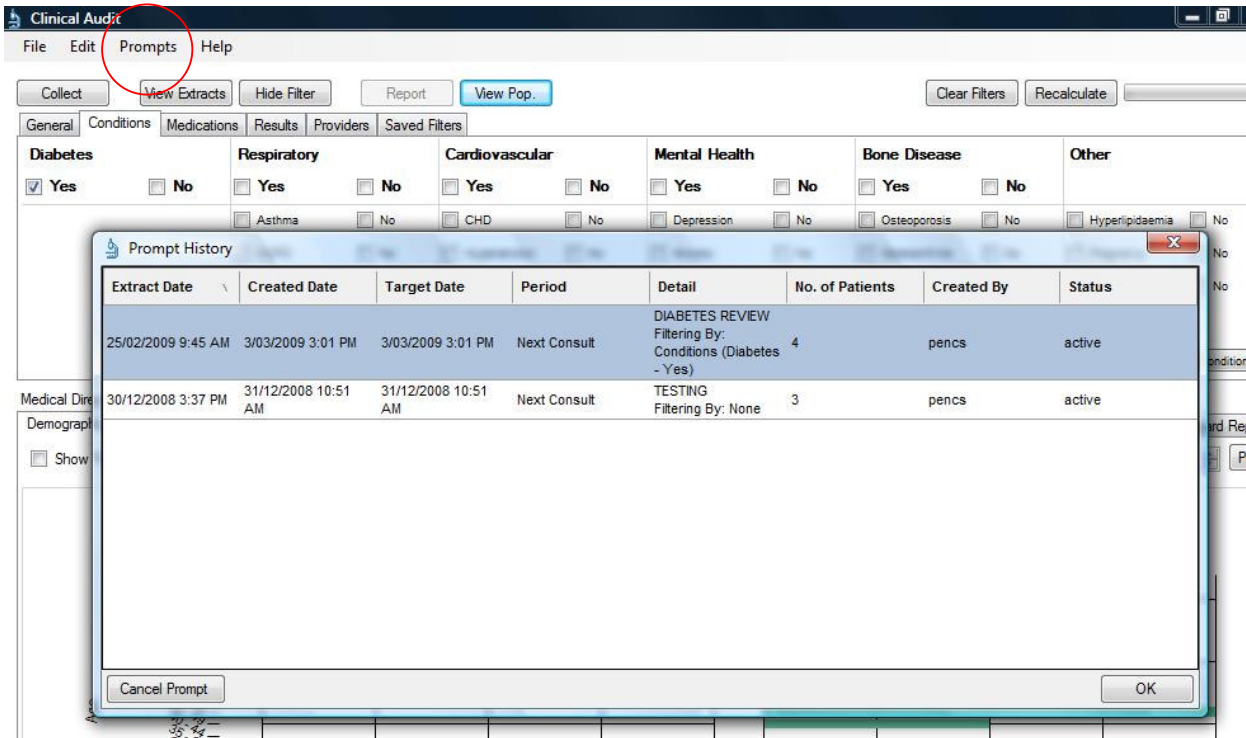


Figure 6.2A: CAT Prompt History dialogue

The CAT Prompt that has just been saved is listed at the top and highlighted. Information about the CAT Prompt includes:

- Extract Date – the date the CAT data extract was created
- Created Date – the date the prompt was created
- Target Date – the date the prompt will become active
- Period – the status period that was selected when the prompt was created
- Detail – the summary text entered and patient filter selection used when the prompt was created
- No. of Patients – the number of patients selected to receive this prompt
- Created by – the user logged into CAT when the prompt was created
- Status – the prompt status: active or cancelled

Note: You can sort the list to your own preference by clicking on the column header.

- Double-click on the prompt that has just been saved
- The 'Prompt Details' dialogue box will display

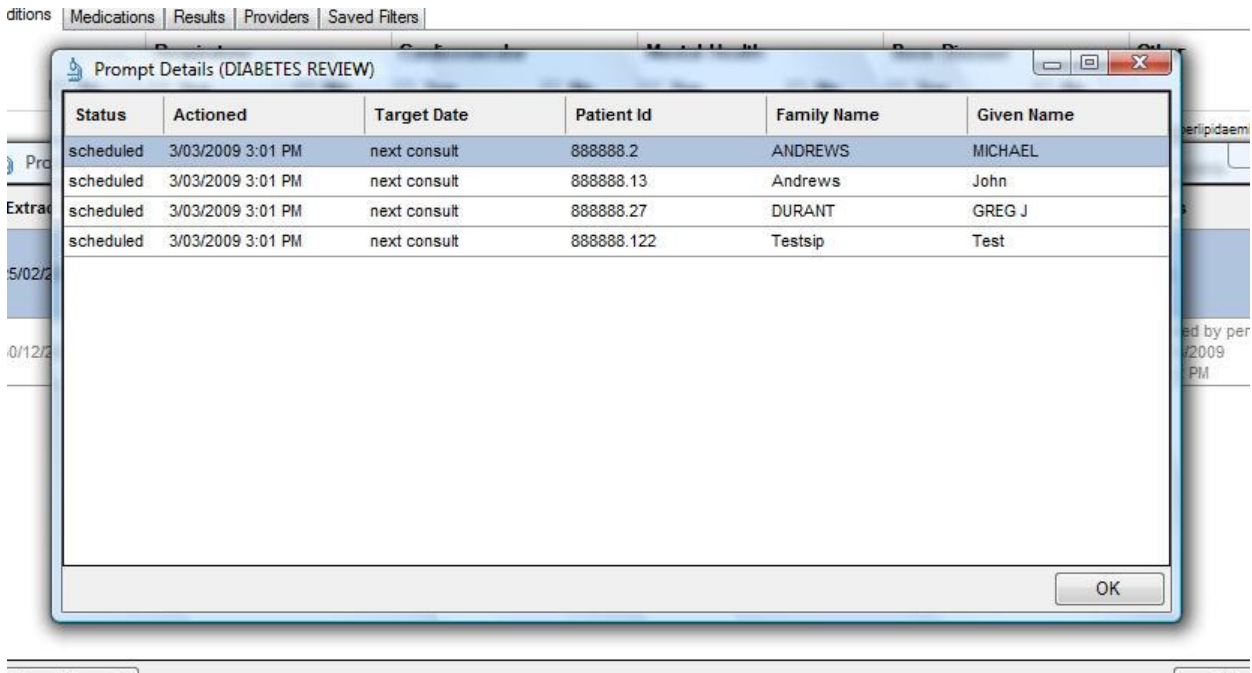


Figure 6.2B: CAT Prompt Details dialogue

This will display the list of patients that were selected for the CAT Prompt. For each patient the following details are provided:

- Status – the prompt status for this patient: initially this will be *scheduled* but this will change when the prompt is actioned by the clinician
- Actioned – the date the prompt was last updated
- Target Date – the date the prompt will become active (this will change if the prompt is rescheduled by the clinician)
- Patient ID – this is a Medical Director ID that may be useful in troubleshooting
- Family Name – patient's family name
- Given Name – patient's given name

6.3 Cancelling a CAT Prompt

CAT Prompts can be cancelled for all patients from the CAT 'Prompts History'

- Click the 'Prompts' menu item
- The 'Prompt History' dialogue box will be displayed (Figure 6.2A)
- From the list of CAT Prompts highlight the prompt to be cancelled
- Click the 'Cancel Prompt' button
- You will be asked to confirm that you want to cancel this prompt
- Click 'OK' to cancel the prompt
- You will be advised the CAT Prompt has been cancelled
- The CAT Prompt will display as greyed out in the list
- You are still able to double-click the CAT Prompt to view the patients that were selected for that prompt

6.4 Responding to a CAT Prompt at Patient Consult

In Medical Director:

1. Open a patient who has been flagged for follow up CAT Prompt.

If the patient has any active CAT Prompts with a target date due the prompt pop up bubble will appear. The prompt summary text will be displayed in the bubble.

The prompt bubble appears with the prompt summary text

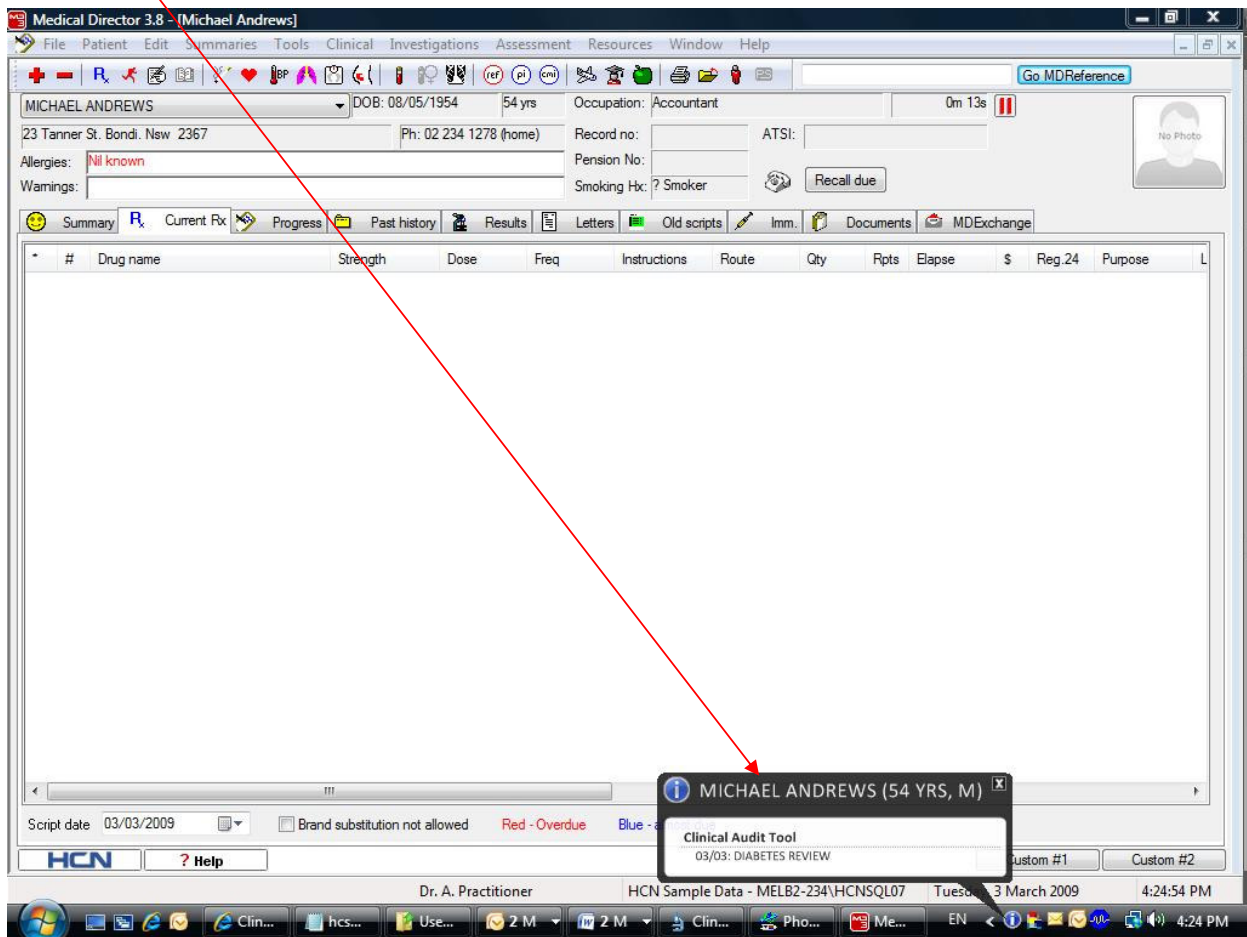


Figure 6.4A: CAT Prompt Pop Up

In the PrimaryCareSidebar™:

1. Open the **PrimaryCareSidebar™** by moving the mouse over the thin line at the right of the screen.

The CAT Prompt details will be displayed in the CAT Prompts panel.

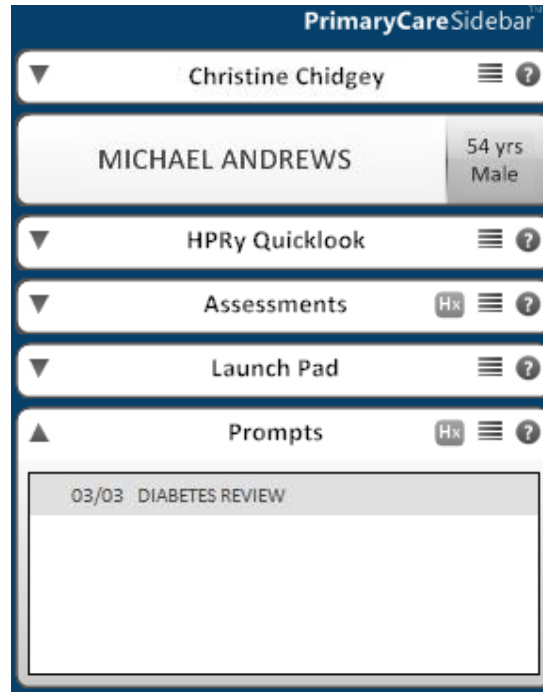


Figure 6.4B: CAT Prompts panel with active prompt

2. Click on the CAT Prompt details to review more information

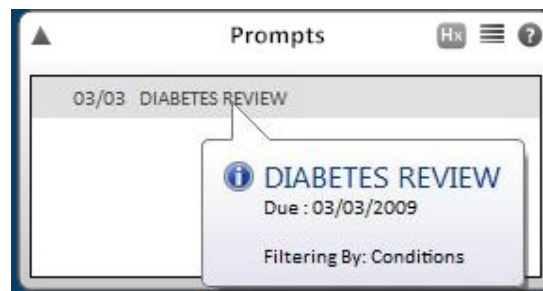


Figure 6.4C: CAT Prompts panel with active prompt information

- Right-click on the CAT Prompt details to choose an action option: *Complete, Cancel or Reschedule*

Reschedule allows you to choose a new timeframe before the CAT Prompt becomes active.

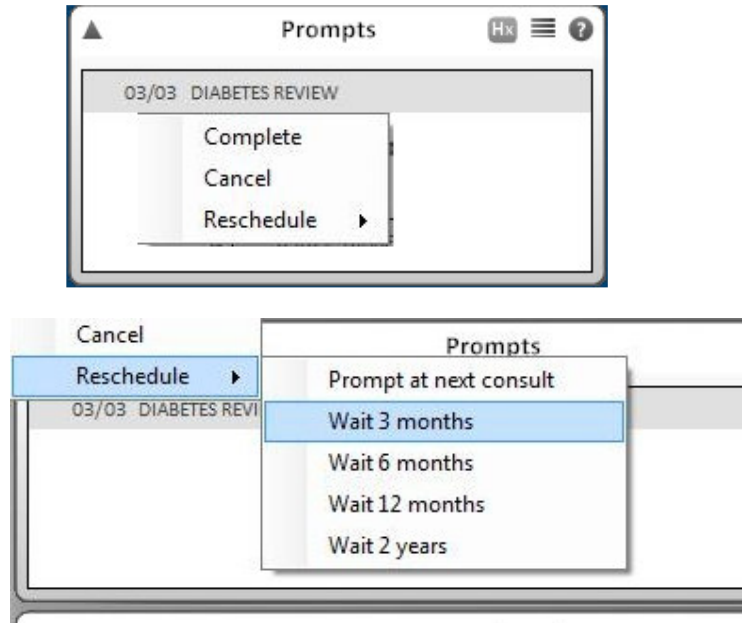


Figure 6.4D: CAT Prompts panel with action options

- Choose 'Complete'
- You will be prompted to complete this prompt

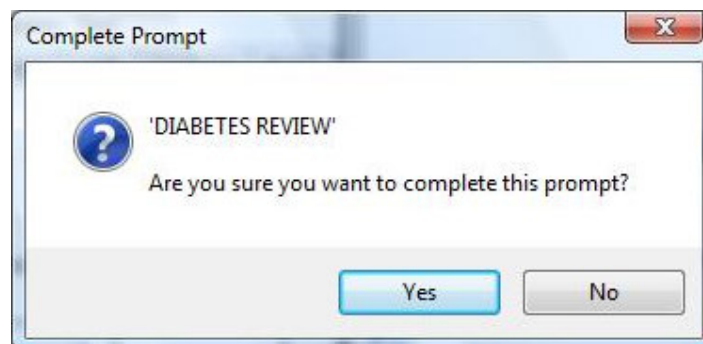


Figure 6.4E: CAT Prompts panel confirm complete

- Click 'Yes'

The CAT Prompt will be completed and you will be alerted to ensure you have added appropriate notes to the Medical Director patient record.

Please note: CAT Prompts do not store any information into the clinical desktop system.

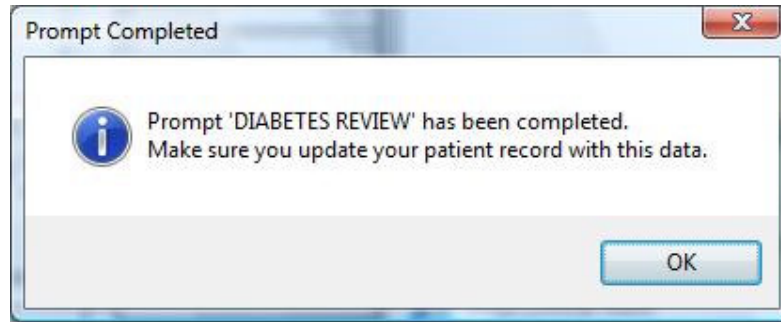


Figure 6.4F: CAT Prompts panel prompt complete

7. Click 'OK'

The CAT Prompt will be completed and removed from the active prompts list

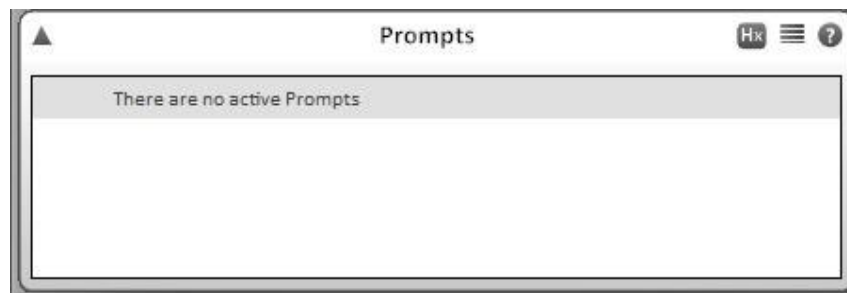


Figure 6.4G: CAT Prompts panel with no active prompts

6.5 CAT Prompts Patient History

All the CAT Prompts that have been created for the patient currently open in Medical Director can be viewed in the **PrimaryCareSidebar™** CAT prompts panel simply by clicking on the History (Hx) icon in the top right-hand corner of the panel.

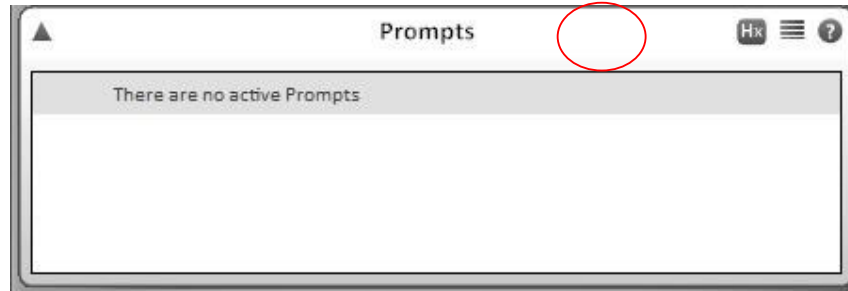


Figure 6.5A: CAT Prompts Panel History Icon

1. Click the 'Hx' icon to view the 'Prompts History'

You will see any active prompts in the top section of the History screen and any completed prompts in the **Archived Prompts** list.

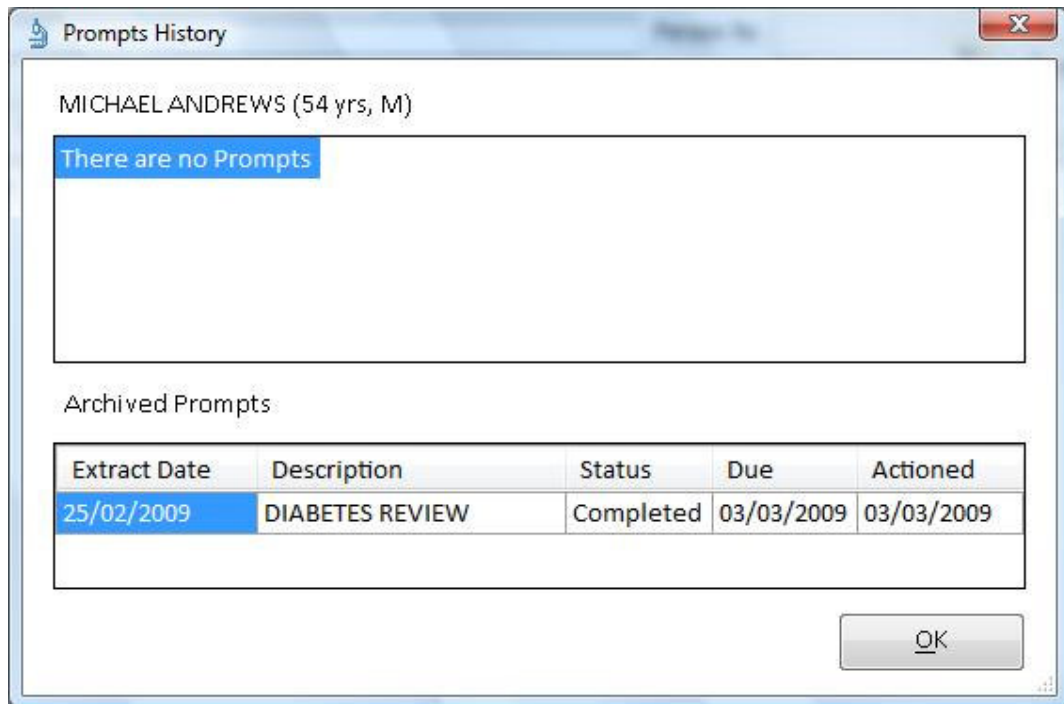


Figure 6.5B: CAT Prompts History Screen