

# PrimaryCare Sidebar® Prompts

## User Guide

Version 2-3



**RACGP**

**OXYGEN**

Delivering e-health

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## Document Control

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# 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 tool generates prompts 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 the PCS Clinical Audit Tool® (CAT).

## 1.3 PCS Clinical Audit Tool® (CAT)

The CAT analyses clinical information from clinical software and translates data into real statistical and graphical information that is easy to understand and action.

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

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## 1.4 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® CAT Prompts User Guide'

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

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

## 1.5 Intended Audience

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

It is expected that you have setup CAT prompts by following the 'PCS Clinical Audit Tool® CAT Prompts User Guide'.

## 1.6 Glossary of Terms

Term	Definition
<b>CAT</b>	PCS Clinical Audit Tool®
<b>Clinical Desktop System</b>	A general term used for the computer program used by a clinician to record patient clinical information
<b>GP</b>	General Practitioner
<b>HCN</b>	Health Communication Network Ltd
<b>Help Desk</b>	RACGP Oxygen Help Desk
<b>MD</b>	Medical Director Clinical Desktop System, developed by HCN
<b>PCS</b>	Pen Computer Systems Pty Ltd
<b>PrimaryCare Sidebar®</b>	A windows dashboard hosting a suite of tools for primary healthcare professionals; developed by PCS
<b>RACGP</b>	Royal Australian College of General Practitioners
<b>Sidebar</b>	PrimaryCare Sidebar®

Table 1. Glossary of terms used

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## 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 2
- Medical Director Version 3
- Best Practice

### 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:

- 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).

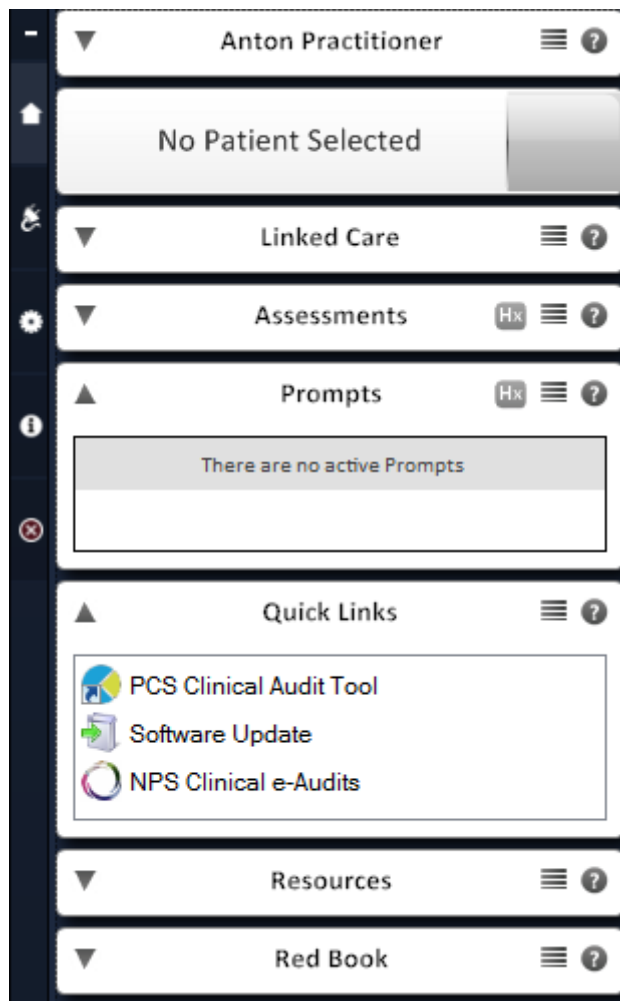


Figure 3A: Sidebar

#### Need more information?

## 4 Prompts Panel

### 4.1 Viewing a Prompt

To view a prompt in the Sidebar:

1. Open a patient in your clinical desktop system who meets the prompt criteria  
If the patient has an active prompt with a target date due the prompt pop up bubble will appear. The prompt summary text will be displayed in the bubble (Figure 4.1A)

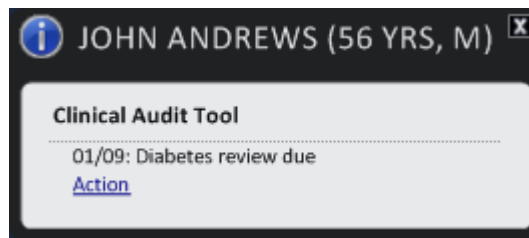


Figure 4.1A: Prompt Bubble

2. In the Sidebar, the prompt details will also display in the Prompts panel including due date, prompt title, and an action link (Figure 4.1B)

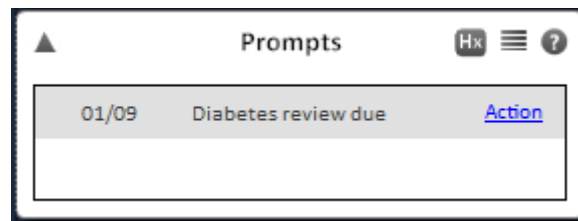


Figure 4.1B: Prompts panel with active prompt displayed

3. Click on the Prompt details to review more information (Figure 4.1C)

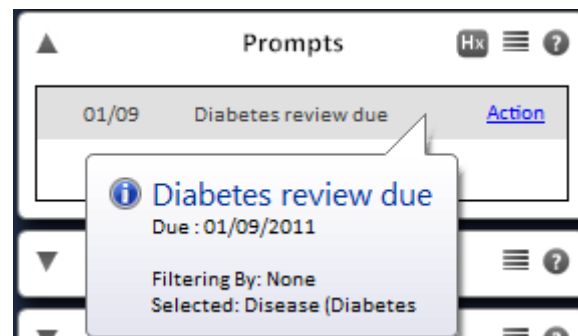


Figure 4.1C: Prompts panel with active prompt information

### Need more information?

## 4.2 Respond to a Prompt

To respond to a prompt, either:

- click the 'Action' link in the Prompt bubble (Figure 4.1A)
- click the 'Action' link in the Prompts panel (Figure 4.1B)
- right-click the prompt in the Prompts panel (Figure 4.1B)

An action menu will display with 3 options (Figure 4.2A). These options are detailed in the following sections.

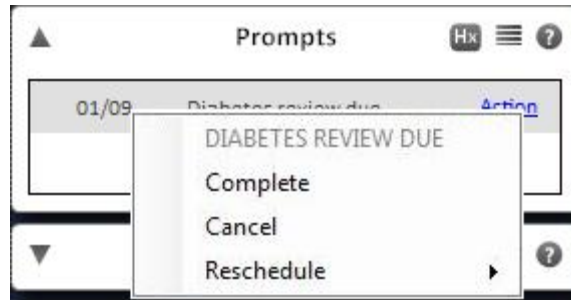


Figure 4.2A: Prompt Action menu

### 4.2.1 Complete a Prompt

In the Prompt Action menu (Figure 4.2A):

1. Select 'Complete'. A dialog will display (Figure 4.2.1A)
2. Ensure you have added appropriate notes to the clinical system patient record as prompts do not store any information into the clinical desktop system

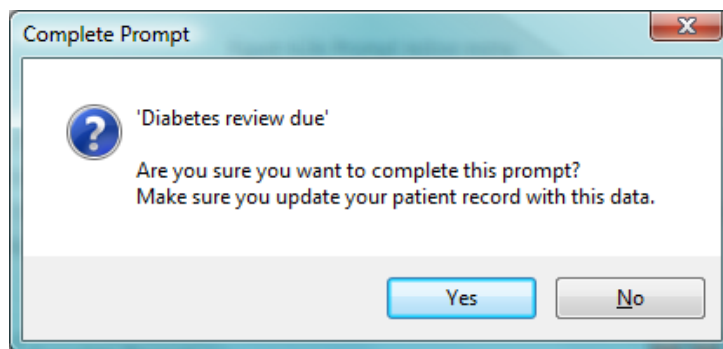


Figure 4.2.1A: Prompts panel complete confirmation dialog

3. Click 'Yes'  
The Prompt will be completed and removed from the Prompts panel. A record of this activity will be saved in the Prompt History (see [Prompt History](#))

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### Need more information?

### 4.2.2 Reschedule a Prompt

In the Prompt Action menu (Figure 4.2A):

1. Select 'Reschedule'. A sub-menu will appear
2. Select a new timeframe before the Prompt reappears, the options are:
  - Prompt at next consult
  - Wait 3 months
  - Wait 6 months
  - Wait 12 months
  - Wait 2 years

The prompt will continue to appear in the Prompts panel with a revised due date. A prompt bubble notification will not appear until the due date is met.

Note: If 'Prompt at next consult' is selected, the due date will become the following day to avoid further prompting during today's consult.

### 4.2.3 Cancel a Prompt

In the Prompt Action menu (Figure 4.2A):

1. Select 'Cancel'. A cancel prompt dialog will display (Figure 4.2.3A)
2. Select 'Yes'. A cancel confirmation dialog will display
3. Select 'OK'

The prompt will be removed from the Prompts panel and a record of this activity will be saved in the Prompt History (see [Prompt History](#))

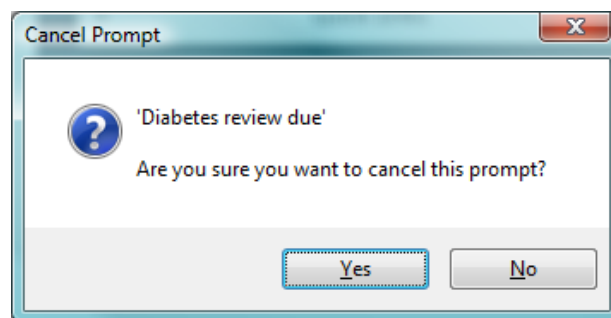



Figure 4.2.3A: Prompts panel cancel confirmation dialog

### 4.3 Prompt History

All the prompts created for the patient open in the Clinical Desktop System can be viewed by clicking the History  icon of the panel (top-right). The Patient's Prompt History dialog will display (Figure 4.3A).

The active prompts (including rescheduled prompts) will display in the top section of the History screen. Any prompt activity (including completed and cancelled prompts) will display in the bottom 'Archived Prompts' section.

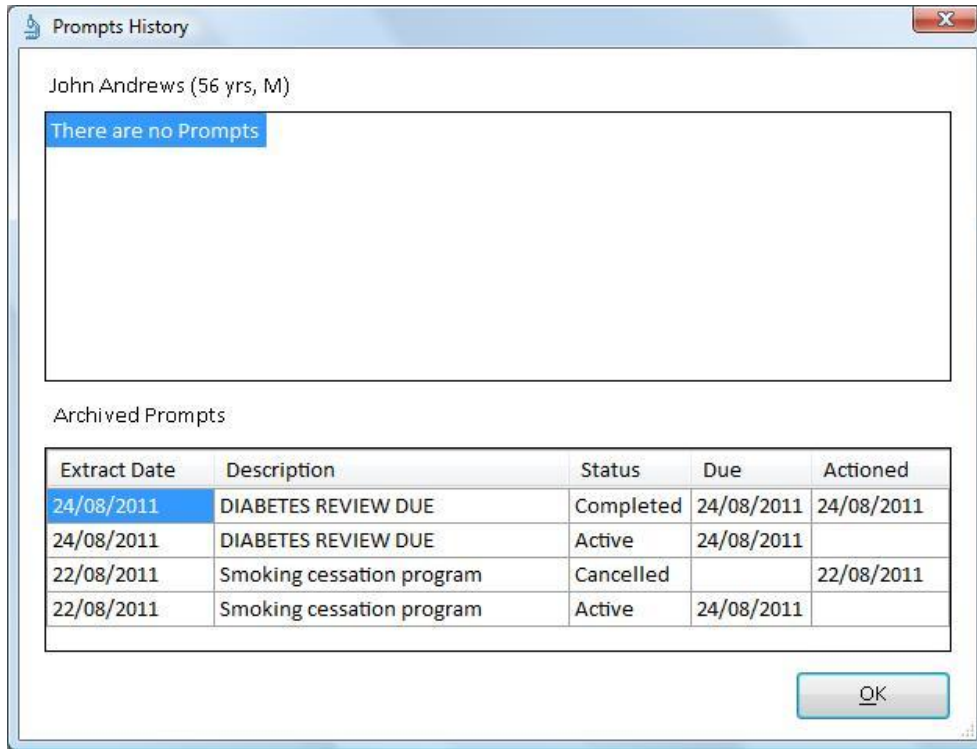


Figure 4.3A: Prompt History

## 5 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.

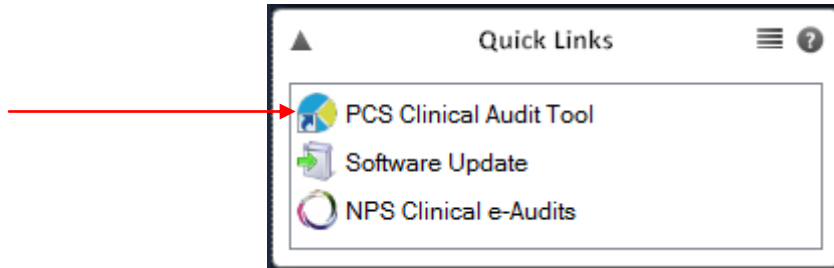


Figure 5A: CAT shortcut in Quick Links panel

## 6 Troubleshooting

For further assistance with Prompts, please contact the RACGP Oxygen Help Desk on 1800 257 053.

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