CAT Plus Practice Installation Checkup

CAT Plus QRG Practice Installation Check

This document provides a checklist for practice support staff on how to check basic settings of an existing CAT4 installation. Our detailed installation guide for CAT4 is **here** and the Topbar technical guides can be found **here**.

CAT4 Preferences

Log on to CAT4 and open the Preferences by clicking on Edit/Preferences

- Clinical Audit Tab: Check the extract directory location – if the practice has more than one CAT4 user, the extract has to be on a shared folder available to all users. We recommend not to use the local C: drive even if there is only one user as network folders are normally included in the backup, but local drives are not.
- Clinical Audit Tab: Check the saved filters and views directory locations, the should be a sub folder of the extract directory and be the same for all CAT users
- BP/MD3 tab: Check BP or MD3 for correctly configured billing system
- Topbar tab: If using Topbar, check if CAT4 is connected to the local Topbar server, if unsure you can click on 'Edit' on the Topbar tab and then use the 'Text Connection' button
- Scheduler tab: If Scheduler is installed for this user/on this machine check if the scheduler working folder is entered and correct
- Data Submission tab: Make sure the 'Patient Consent Withdrawn Folder' is the same for all instances of CAT4 as otherwise this will create different de-identified data based on which user de-identified the data

Send To PAT CAT

The full guide is available **here**

To check an existing configuration:

- From the CAT4 user interface click on Edit/Send Data Extract Locations
- You should see a PAT CAT location configured
- Verify the webservice URL of the PAT CAT server
- Verify the username and password you have configured in PAT CAT for the practice. This is a different username from the CAT4 logon and is created by the PHN in PAT CAT not by Pen CS.
- Click on the Test button to test the connection – if all is working you will receive a notification. If no connection can be established please contact Pen CS support

Scheduler

To check an existing scheduled collection and/or data upload click on the 'Scheduler' entry in the menu bar of CAT4. This menu item will only be available if Scheduler is set up to run on this machine and CAT4 is configured correctly as detailed above under CAT4 preferences. By default Scheduler is installed on the server in a profile not accessible by all users – please check with local administrators or Pen CS support if unclear.

Topbar

- Check if auto start and single sign on are configured correctly depending on the clinic users' preferences.
- Check if any filters are active (but remember that this is a 'per user' setting and you won't be able to see what users other than the currently logged on user have configured.
- Check if all users are happy with the currently active apps, often the doctors want the 'waiting room' app turned off to focus on the patients in the consult room only
- If Topbar is linked to CAT4 you can check a number of reports in the Cleansing View of CAT4 on Topbar use:
  - Topbar Prompts report – this will show you how many prompts have been actioned on which patients – these reports can be filtered for visit date range and provider to narrow down the results
  - Reviewed patients report – each of the four reports showing patients with indicated chronic conditions has a 'Reviewed' tab, this will show if any patients have been removed by users at this clinic as they don't have the indicated condition. The report will also show the user name and software (CAT4 or Topbar) used to remove the patient from the list.

PAT CAT

As PAT CAT is web based the only thing to test is if your PAT CAT server is accessible from the practice and if the provided username and password allows access to PAT CAT.