CAT4 Technical Guide

CAT GUIDES

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1 SYSTEM REQUIREMENTS

The minimum and recommended system requirements to be able to run the Clinical Audit Tool 4 are provided in this section.

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1.1 Minimum and Recommended Requirements

Please note that Pen CS will discontinue support for Windows 7 and Server 2008 R2 from the 1st of July 2020. Microsoft has discontinued support for these products on the 14th of January 2020 and there will be no further security updates available from Microsoft for their discontinued products. Please update as soon as possible to avoid exposing your network to security risks. Updates from Windows 7 to Windows 10 are still available for free through the Microsoft website - here is an article describing the process: CNET article about Win10 update options¹

	Server	
Item	Minimum	Recommended
Operating System	Windows Server 2012 (64 bit)	Windows Server 2012 R2 (64 bit) or higher
Processor	Intel Core i3-2100/Core i5-2300/Core i7-920 or AMD equivalents	Intel Core i7-2600/Xeon E5502 or better or AMD equivalents

¹ https://www.cnet.com/how-to/you-can-still-download-windows-10-free-you-should-because-windows-7-dead/

RAM	8GB	16GB
Hard Disk	1GB	10GB
Monitor		
.NET	4.6 2.0*	4.6 2.0*
SQL (Topbar only)	Existing installations: Microsoft SQL Server 2008 R2 or SQL Server 2014 New installations: Microsoft SQL Server 2016	Existing Installations: Microsoft SQL Server 2014 New installations: Microsoft SQL Server 2016
Network	100Mbit	1Gbit
	Client	
Item	Client Minimum	Recommended
Item Operating System	Client Minimum Windows 8	Recommended Windows 10 64 bit
Item Operating System Processor	Client Minimum Windows 8 Intel Core i3-530/Core i5-750/Core i7-860 or AMD equivalents	RecommendedWindows 10 64 bitIntel Core i3-2100/Core i5-2300/Corei7-920or better or AMD equivalents
Item Operating System Processor RAM	Client Minimum Windows 8 Intel Core i3-530/Core i5-750/Core i7-860 or AMD equivalents 4 GB	Recommended Windows 10 64 bit Intel Core i3-2100/Core i5-2300/Core i7-920 or better or AMD equivalents 8GB
Item Operating System Processor RAM Hard Disk	Client Minimum Windows 8 Intel Core i3-530/Core i5-750/Core i7-860 or AMD equivalents 4 GB 1 GB	RecommendedWindows 10 64 bitIntel Core i3-2100/Core i5-2300/Core i7-920 or better or AMD equivalents8GB1GB
Item Operating System Processor RAM Hard Disk Monitor	ClientMinimumWindows 8Intel Core i3-530/Core i5-750/Core i7-860 or AMD equivalents4 GB1 GB17" running 1080p	RecommendedWindows 10 64 bitIntel Core i3-2100/Core i5-2300/Core i7-920 or better or AMD equivalents8GB1GB22" running 1080p

Network 100Mbit 1Gbit

• Other Requirements

The computer used for data collection through CAT4 needs to have the clinical system installed. PCS Clinical Audit uses an authentication mechanism that requires a persistent internet connection. It is recommended that you have a broadband internet connection to operate CAT4. CAT4 uses a lot of memory and the provided minimum requirements will not be sufficient for larger practices with more than 5000 patients. We strongly recommend a 64 bit operating system and as much RAM as possible.

1.2 Install URL

To install PEN CS Clinical Audit you must use Internet Explorer version 9 or any later browser. Clinical Audit can be installed by going to the following URL

http://install.pencs.com.au/ClickOnce/CAT4/publish.htm

1.3 Clinical and Billing System Compatibility

1.3.1 Clinical Systems

CAT4 is compatible with the following clinical application and versions. As new versions are released, PEN CS CAT4 will be validated and, if required, updated to maintain compatibility.

- Best Practice CAT4 is compatible with Best Practice version 1.6.0.395 and later for full details check System Requirements Topbar²
- Communicare CAT4 is compatible with Communicare Version 11.2 and later.
- *EMR* CAT4 will create a PIP QI report only.
- Genie CAT4 is compatible with Genie Version 9.0.1 and later.
- Medical Director CAT4 is compatible with Medical Director Versions 3.15 and later.
- Medinet CAT4 is compatible with Medinet Version released July 2011 and later.
- *MedTech* CAT4 is compatible with MedTech32 Version 9.2 and later including Medtech Evolution.
- *MMEx* CAT4 is compatible with MMEx Version 22.7 and later.
- Profile CAT4 will create a PIP QI report only.
- Specialist Complete formerly know as GP Complete.
- *Stathealth* CAT4 is compatible with Stathealth.
- *The Practice* CAT4 is compatible with The Practice.
- Zedmed CAT4 is compatible with Zedmed Version 11 and later.

For Topbar requirements and compatibility please check this page: System Requirements Topbar³

² https://help.pencs.com.au/display/TTG/System+Requirements+Topbar

³ https://help.pencs.com.au/display/TTG/System+Requirements+Topbar

Clinical Information System	CAT4	Scheduler	Topbar	PIP QI*	LUMOS (NSW only)
Best Practice	Yes	Yes	Yes	Yes	Yes
Communicare	Yes	Yes		Yes	
EMR	Only PIP QI			Yes	
Genie	Yes	Yes		Yes	
Medical Director	Yes	Yes	Yes	Yes	Yes
MedTech32	Yes			Yes	
MMEx	Yes				
PrimaryClinic (Medinet)	Yes	Beta testing		Yes	
Profile	Only PIP QI			Yes	
Specialist Complete	Yes	Yes		Yes	
StatHealth	Yes	Yes		Yes	
The Practice				Yes	
Zedmed	Yes	Yes	Yes	Yes	Yes

1.3.2 CAT Plus Clinical Compatibility Matrix

*PIP QI compatible clinical systems produce an extract containing all required data items for the PIP QI improvement measures

1.3.3 Billing Systems

Billing is compatible when the clinical and billing systems are provided by the same vendor and the data extract for the clinical system is version 1_5 or above. Currently the following billing is supported:

- MD2 or MD3 and Pracsoft OR Mediflex OR Zedmed OR 'The Practice'^ OR Medilink
- BP and BP Management OR Pracsoft 3 OR Mediflex OR Zedmed OR 'The Practice'^ OR Medilink
- Zedmed and Pracsoft OR Mediflex OR Zedmed
- practiX
- Communicare
- MedTech
- MMEx
- Genie

1.3.4 CAT Plus Billing Compatibility Matrix

Billing Information System	CAT4	Topbar
Pracsoft	Yes	Yes
BP Management	Yes	Yes
Zedmed	Yes	Yes
Communicare	Yes	
Mediflex	Yes	
MedTech	Yes*	
Medilink	Yes	
ММЕХ	Yes	
Medinet		
Genie	Yes	
The Practice	Yes^	

^November 2016 release

*The data extraction process is completed within the clinical system. Please see the relevant Data Mapping document for instructions: http://help.pencs.com.au/display/ADM/Appendices+Data+Mapping

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
MedicalMic roData Version		1_ 27	1_2 7	1_ 27	1 - 2 7	1_16	1_27	1_27	1_15	1_25
Alcohol										
	Alcohol	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
Allergies										
	Allergies	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
CHA DS VASC Score										
	CHA DS VASC Scores	Ye s	Yes	Ye s	Y e s	No	Yes	Yes	Yes	Yes
CKD										

1.3.5 Compatibility for each clinical system for each report

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	CKD At Risk	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	CKD Manage ment	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
Co- morbidities										
	Co- morbiditi es	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
CV Event Risk										
	CV Event Risk	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
Data Cleansing										
	Missing Demogra phics	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	Missing Clinical/ Accredita tion Items	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Indicated CKD with no diagnosi s	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Indicated COPD with no diagnosi s	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Indicated Diabetes with no diagnosi s	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Indicated Mental Health with no diagnosi s	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Indicated Osteopor osis with no diagnosi s	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	Medicati on Review	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
Data Quality										
	CDSA- Data Complet eness Patient Graph	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	CDSA- Data Complet eness Report	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	CDSA- Data Quality Dahsboa rd	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	CDSA- Duplicat e Name Patient Report	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	CDSA- Duplicat e Number Patient Report	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
Demograp hics										
	Populati on Pyramid	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Age Profile	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
Diabetes SIP Items										
	Diabetes SIP- Items Complet ed Per Patient	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Diabetes SIP- Items Remaini ng	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	Diabetes SIP- Items Recorde d	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
Disease										
	Count	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Prevalen ce	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Cancer Conditio ns	Ye s	Yes	Ye s	Y e s	No?	Yes	Yes	No	Yes
Digital Health										
	MyHealt h Record status	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
	MyHealt h Record and SHS	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	SHS Age	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
	SHS by Provider	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
	SHS Uploads	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
	SHS Uploads by PIP Quarterly Period	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
	ES Uploads	Ye s	Yes	No	Y e s	No	Yes	Yes	No	Yes
	ES Age	Ye s	Yes	No	Y e s	No	Yes	Yes	No	Yes
Ethnicity										
	Ethnicity Status	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Ethnicity Profile	Ye s	Yes	Ye s	N o	No	No	No	No	No

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
Immunisati ons										
	Immunis ations- Influenza	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Adult- Pertussis	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Adult- Pneumo coccal	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Adult- Shingles	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
	Adolesce nt-DTP	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Adolesce nt-HPV	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Adolesce nt-VZV	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Child Schedule	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	Child NKPI Essential Immunis ations	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
Maternal Health Care										
	Baby Birth Weight- Mothers Antenata I Record	Ye s	Yes	Ye s	Y e s	?	Yes	Yes	Yes	Yes
	Baby Birth Weight- Patient Record	Ye s	Yes	Ye s	Y e s	?	Yes	Yes	Yes	Yes
	Antenata l Visits- Antenata l Count	Ye s	Yes	Ye s	Y e s	?	Yes	Yes	Yes	Yes
	Antenata l Visits- Date of First Visit	Ye s	Yes	Ye s	Y e s	?	Yes	Yes	Yes	Yes
	Antenata l Visits- Number of Visits	Ye s	Yes	Ye s	Y e s	?	Yes	Yes	Yes	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	Antenata l Visits- Size in Weeks at First Visit	Ye s	Yes	Ye s	Y e s	?	Yes	Yes	Yes	Yes
MBS Eligibility										
	MBS- Diabetes SIP Eligibility	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	MBS- GPMP/ TCA Eligibility	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	MBS- Health Assessm ent Eligibility	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
MBS Items										
	MBS Items-AH Claims	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	MBS Items- Count	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	MBS Items- Not Recorde d	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	MBS Items - Telehealt h and NP	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
Measures										
	Measures -BMI	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Measures -BMI Child (5-18)	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Measures -BP	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Measures - Spiromet ry	Ye s	Yes	Ye s	Y e s	No	Yes	Yes	Yes	No
	Measures -Waist	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	Measures -Weight/ Height(0- 4)	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Physical Activity	Ye s if pri nt ed	Yes	Ye s	?	?	?	Yes	Yes	?
Medication s										
	Medicati ons Not Printed in Last 6 Months	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Medicati ons Per Patient	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Medicati ons- Count	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Medicati ons- Prevalen ce	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
Musculoske letal										
	Muscosk eletal Risk Factors	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
Pathology										
	Lipids- Choleste rol	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Lipids- HDL	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Lipids- LDL	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Lipids- Total Chol/ HDL Ratio	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Lipids- Triglyceri des	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	eGFR	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	ACR	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Microalb umin	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	HbA1c	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	FBG	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	RBG	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	INR	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Creatinin Serum	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
Screening										
	Cervical Screenin g	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	Pap Smear Done Date	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Pap Smear Recorde d	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Pap Smear Summar y Report Card	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Mammog ram	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	FOBT Last Recorde d	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	FOBT Orders and Results	Ye s	Yes	Ye s	N o	Yes	No	Yes	Yes	Yes
	FOBT Summar y Report Card	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
Sexual Health										

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	STI Screenin g Report (16-34yrs)	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
	STI Screenin g Report (All Patients)	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
	STI Screenin g- Chlamyd ia	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
	STI Screenin g- Gonorrh oea	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
	STI Screenin g-Hep B	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
	STI Screenin g-Hep C	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
	STI Screenin g-HIV	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	STI Screenin g- Positive STI Follow up	Ye s	Yes	Ye s	N o	No	No	Yes	No	Yes
	STI Screenin g- Syphilis	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
	STI Screenin g-Testing Patterns	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
	STI Screenin g- Trichom oniasis	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	No	Yes
Smoking										
	Smoking - Status	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Smoking - Cessatio n	Ye s	Yes	No	Y e s	Yes	No	Yes	No	No

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec Specialis h t (details Complet to be e (details confir to be med) confirme d)		StatHe alth (details to be confirm ed)
Standard Reports										
	PIP QI	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	APCC	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	QAIHC	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Healthy For Life	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	National KPI Report	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	National KPI-Adult Preventa tive Health	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	National KPI-Child Health	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	National KPI- Chronic Disease Manage ment	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	National KPI- Chronic Disease Risk Factors	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	National KPI- Maternal Health	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	OSR	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	eHealth	Ye s	Yes	Ye s	Y e s	Yes?	Yes	Yes	Yes	Yes?
	Health Care Provider s	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
Visits										
	Visits- Last Visit	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Visits- Visits Last Week(Ne w Patients)	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes

Report	Tabs	BP	MD Cli nic al	Ze d m ed	G e n ie	Commun icare (details to be confirme d)	Medinet (PrimaryCl inic) (details to be confirmed)	Medtec h (details to be confir med)	Specialis t Complet e (details to be confirme d)	StatHe alth (details to be confirm ed)
	Assigned Provider	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Visit Types	Ye s	Yes	Ye s	N o	Yes	No	Yes	Yes	No?
	Episode Count	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	Yes
	Contact by OSR	Ye s	Yes	Ye s	Y e s	Yes	Yes	Yes	Yes	No?
	Age Gender Visit Count	Ye s	Yes	Ye s	Y e s	No	Yes	Yes	No	No?
	Disease Visit Count	Ye s	Yes	Ye s	Y e s	No	Yes	Yes	No	No?
Viral Hepatitis										
	Hep B at risk screenin g	Ye s	Yes	Ye s	Y e s	No	Yes	Yes	No	No?
	Hep B manage ment	Ye s	Yes	Ye s	Y e s	No	Yes	Yes	No	No?

1.4 Best Practice Requirements

With the JADE release BP has introduced a partner program where the partner details have to be configured in BP. Under Setup/Configuration:



Got to Database and pick the 'Setup third-party integrations' button:

🤾 Configuration				×
S	The following list of servers that have a Please select the one that this compute	an instance of Bp Premier insta er will be connecting to.	lled were found.	
General	Servers		Find Servers	
Results import				
Database	Connect to:			
	(local)		Change	
Lists	Passwords:			
	Database browser Er	nergency patient access		
Reminders	External data	_		
	Clinical Billing	Appointments		
	Setup third-party inte	egrations		
Care plans	Drug database			
\bigcirc	Backup drug database at the end o	of a data update		
E-mail	C:\ProgramData\Best Practice\Backu	ıb/		Set Folder
	Delete local copy of dru	ug database		
Bp Comms	¢		Save	Cancel

The following screen will show a list of third party providers (subject to change):

Tick the box next to PEN CS to setup the integration with CAT4, then click on 'Save'.

K	Setup third party integrations
	The third-party software providers listed below are members of the Best Practice Partner Network. You will need to approve partners by selecting them from the list if you would like to grant them secure access to your Bp Premier data.
	Third-party providers AutoMed Systems BPAC Clinical Solutions Doctors Control Panel HotDoc Javex MyHealth 1st ✓ Pen CS
	Deselect all Save Cancel

•

• For older versions of BP (prior to the JADE Edition):

Option 1: Configuring a BP Database Browser password -> Enter that password in the preferences Option 2: Ticking the 'External data access' checkboxes in Best Practice -> Leave the password preference field empty

You can also change the settings for extracting archived and deceased patients which by default is set to 'No'. This is generally not needed in General Practice but is required for the NKPI report⁴. The Location list settings is relevant for clinics that share one server for multiple locations - more details are described here: Best Practice Data Collection by Location⁵

In Best Practice: Select Setup > Configuration from the top menu bar.

⁴ https://help.pencs.com.au/display/CG/National+KPI+Report

⁵ https://help.pencs.com.au/display/CG/Best+Practice+Data+Collection+by+Location

🕺 Best Practice												
File Clinical Management Utilities View	Setup Help											
🔋 🖾 🔗 🛛 🥥 🗋	Printers Practice details											
	Configuration Shift+F3											
	Users Shift+F4											
	Preferences Shift+F5											
	Sessions Shift+F6											

Select the 'Database' option from the left hand tool bar

Option 1: Set the database browser password

- Click the 'Database browser' button
- Enter and confirm a password of your choice
- If a password has previously been configured you will be required to enter the current password as well

NOTE: If a password has been configured and you do not know what it is you will need to contact Best Practice Support for assistance to reset the password.

9	ιυ.
General	
	🤾 Database viewer password 🛛 🔀
	Enter the new password:
Results import	
	Enter the new password again to confirm:
Database	
Lists	Cor Save Cancel e
	Passwords: Database browser Emergency patient access

{color}
Option 2: Tick ALL the 'External data access' checkboxes and Save

R Configuration	
General	The following list of servers that have an instance of Best Practice installed were found. Please select the one that this computer will be connecting to.
	Servers
	PCSMELB303
Results import	(local)
Database	
Lists	Connect to: PCSMELB303 Change
	Passwords: Database browser Emergency patient access
Reminders	Delete local copy of drug database
Care plans	External data access: Clinical Billing Appointments
E-mail	
-	<u>Save</u> <u>Cancel</u>

In Clinical Audit:

- Option 1: Enter the browser password you have set up in the CAT4 Best Practice Preferences.
- Option 2: Leave the password field empty in the CAT4 Best Practice Preferences.

Refer to the section in this document 'Setting Your Preferences'.

1.5 Genie Requirements

Since the release of the integrated Genie extractor in 2019 CAT4 scheduler is compatible with Genie. There are a number of requirements to install Scheduler in a Genie environment:

Here is a list of those requirements:

• OS is 64 bit Windows 7 or higher, not Mac OS. CAT4 and Scheduler are not compatible with Mac OS!

- The version of Genie has to be 9 or higher
- No Genie Client is required in the computer where CAT Scheduler going to be installed
- .NET 4 installed, preferably .net 4.6 or higher
- Make sure the computer is having minimum recommend requirements for CAT4 / Scheduler as listed here: https://help.pencs.com.au/display/CG/Minimum+and+Recommended+Requirements(see page 5)
- SQL server component of Genie has to be running; This has to be verified within the Genie Server
- Genie Database server IP Address and port are known (default port is 19812)
- A Genie username and password is known (This doesn't have to be a Genie admin user)

1.6 Zedmed Requirements

The Zedmed and Zedmed data directory should have populated with your install locations, if the locations are not correct you can change the folder to match your settings. We recommend to leave the default settings unless you are experiencing problems with the data collection. To enable CAT4 to extract pathology results it needs to access the Blobs folder. This folder is used by Zedmed to store HL7 based data. The default location is c: \zedmeddata\blobs but this can vary depending on your installation – to verify the location you can check **CRS_App_Server.ini** (which may be in a folder called ZedmedServer) which should have an entry called *BLOBFilesPath=C:\ZedmedData\Blobs*

From version 29 and later Zedmed will require an 'Integrator Password' for CAT4 to access the patient data in Zedmed. This password is set up in Zedmed first and will then have to be updated/entered in the CAT4/Edit/ Preferences/Zedmed screen.

Use the 'Test Integrator Password' button to check if your password is valid.

You can also change the settings for extracting archived and deceased patients which by default is set to 'No'. This is generally not needed in General Practice but is required for the NKPI report⁶.

⁶ https://help.pencs.com.au/display/CG/National+KPI+Report

Olir	nical Au	dit Prefe	rences											×	
Clinica MedT	al Audit ech32	Refuge MMEX	e Health practiX	Best Practic StatHealth	e Comm Zedmed	unicare Medifle	Ferret x Medi	Genie ilink Th	GPComple ne Practice	ete Medica Scheduler	Director 3 Data Subr	Medine	t Topbar		
Loc Zec	al Zedm	ned Direct rectory No	tory ote			[C:\Zedn Please t This will	ned prowse to usually b	o your local 2 be C:\Zedme	Zedmed insta ed or C:\Pati	allation direct	tory.			
Loc Dat	Local Zedmed Data Directory Data Directory Note								C:\ZedmedData\Blobs Please browse to your Zedmed Blobs directory. This may be C:\ZedmedData\Blobs or a folder on your Zedmed server.						
Pas	ssword					[Test	•••	r Password						
Pas	ssword N	Note					The Zeo passwor Zedmed If you ha required If you do to reset	dmed inst rd for the Iversion ave Zedr to use C o not rem it for you	taller will hav Integrator a 29 or later. med version CAT. member this p	ve prompted ccount when 30.3 or later, assword, you	you to creat n you installe this passwo u can ask Z	e a ed ord is edmed			
Ext Bat	ract Arch ch Size	hived and	l Decease	ed Patients			No 5000					~			
											0	ιK	Can	cel .:	

Zedmed has advised Pen CS that they have made some changes in Zedmed v29 to improve data security by introducing an Integrator Account. What this means is that the current connections strings Pen CS uses to access the Zedmed database for data collections need to be replaced to use the new Integrator Account.

Pen CS will be making changes in CAT4 and Topbar to enable this change.

What will practices need to do?
1. 1. Practices will need to set up their Integrator Password as required by Zedmed.

1. 2. Practices will need to update their CAT4 configuration settings with the Integrator Password.

In order for CAT4 and Topbar to continue functioning, there is a transition window for practices to update their configuration but they must have updated before they upgrade to Zedmed v30.3.

CAT4 and Topbar will not work in Zedmed v30.3 if the configuration has NOT been updated.

1.7 practiX Requirements

The practiX software application requires practiX Support to upgrade the practiX application to provide the Custom PENEXTRACT Administration option. The data extraction process is described in the practiX Mappings document available from http://help.pencs.com.au/Cat.htm.⁷

ools <u>H</u> elp	
Practice Management	
Processes	
Reporting	
- Custom	
PENEXTRACT	
System Configuration	
+ System Processes	

Image 5: PratiX Configuration⁸

1.8 Communicare Requirements

Communicare provides an executable file (cccatExport.exe) that must exist in your local Communicare installation directory in order for Clinical Audit to be able to collect data. The local Communicare installation directory is usually C:\Program Files\Communicare.

If this file is not installed you will receive the following error message when you click the Clinical Audit 'Collect' button.

⁷ http://help.pencs.com.au/cat.htm

⁸http://help.pencs.com.au/cat.htm



Image 6: Communicare Collection Error

If you receive this message contact Communicare for assistance.

1.9 Medinet Requirements

The Medinet software application provides a new Reports menu option that performs the data extraction for Clinical Audit. The data extraction process is described in the Medinet Mappings document available from Medinet Data Mapping⁹

1.10 MedTech32 Requirements

MedTech32 provides an executable file (MT2PenCAT4.exe) that must exist in a special MedTech32 CAT4 extractor installation directory in order for Clinical Audit to be able to collect data. The installation directory is usually C: \Program Files\Medtech Global Limited\MT2PENCAT4.

If this file is not installed you will receive the an error message when you click the Clinical Audit 'Collect' button advising the file is missing.

If you receive this message contact MedTech32 for assistance.

1.11 Scheduler Requirements

Scheduler allows automatic data collections and, if required, automatic data de-identification and upload. Scheduler only works with Medical Director Clinical, BestPractice, Zedmed, Communicare, Genie and Specialist Complete. It is a windows service and runs under the local system account. This account needs a number of permissions including access to specific local folders and internet access to check for updates.

Clinical Information System	CAT4	Scheduler
Medical Director	Yes	Yes

⁹ https://help.pencs.com.au/display/ADM/Medinet+Data+Mapping

Clinical Information System	CAT4	Scheduler
Best Practice	Yes	Yes
Zedmed	Yes	Yes
Communicare	Yes	Yes
Genie	Yes	Yes
Specialist Complete (formerly GP Complete)	Yes	Yes
PrimaryClinic (Medinet)	Yes	
MedTech32	Yes	
ММЕХ	Yes	
practiX	Yes	
StatHealth	Yes	Yes

1.12 Outdated CAT4 versions

We are not supporting older versions of CAT4 any more and you will receive an error message if you try to log on to an outdated version of CAT4:

Supported:

CAT4 V4.14 November 2018¹⁰

CAT4 V4.13 October 2018¹¹

CAT4 V4.12.1 September 2018¹²

CAT4 V4.11 July 2018¹³

¹⁰ https://help.pencs.com.au/display/CG/CAT4+Release+Notes+V4.14+November+2018

¹¹ https://help.pencs.com.au/display/CG/CAT4+Release+Notes+V4.13++October+2018

¹² https://help.pencs.com.au/display/CG/CAT4+Release+Notes+V4.12.1+September+2018

¹³ https://help.pencs.com.au/display/CG/CAT4+Release+Notes+V4.11+July+2018

1.13 Medical Director Requirements

Select your Database Configuration from the drop-down list. These will match the configurations you have available through the 'HCN Maintenance' icon on your desktop. You can also change the settings for extracting archived and deceased patients which by default is set to 'No'. This is generally not needed in General Practice but is required for the NKPI report¹⁴. The Location list settings is relevant for clinics that share one server for multiple locations - more details are described here: CAT4 MD3 Collection by Location¹⁵

Please note that the "Progress Note Batch Size" settings are only required if there is a problem with corrupt tables in your MD3 installation. Please contact Pen CS support to assist if you are experiencing issues with no active patients showing in your CAT4.

¹⁴ https://help.pencs.com.au/display/CG/National+KPI+Report

¹⁵ https://help.pencs.com.au/display/CG/MD3+Data+Collection+by+Location

Clinical Audit Preferences	
MedTech32 MMEX practiX Zedmed Mediflex Medilink Clinical Audit Refugee Health Best Practice Communicare	The Practice Scheduler Data Submission Topbar Ferret Genie GPComplete Medical Director 3 Medinet
Local AZdex Directory	C:\Program Files (x86)\Health Communication Network\Med
Database Configuration	MD Live Data
Database Server (optional override)	
Database Server Note	If you change the server you will need to restart CAT to refresh the Location List.
Document Server	C:\ManageEzy\
Document Library	HCN
Billing Software	Pracsoft 3
Mediflex/Medilink/The Practice Note	If you are using Medical Director 3 and Mediflex, Medilink or The Practice, please check the relevant tab to ensure the 'Application Directory' Setting is correct.
Progress Note Batch Size (optional override)	
Progress Note Batch Size Note	This setting is only required where the extract contains no Active patients. This is caused by a Progress Notes table indexing error that can be resolved using batching.
Extract Archived and Deceased Patients	No
Practice Location List (comma separated) (Enter ALL for a single extract, IND for an extract per Pracsoft location)	
Program Location List (comma separated) Prefix entered in patient record no (Enter ALL for a single extract)	
	OK Cancel

1.14 Profile Requirements

Profile is creating an extract of the patient data that contains the required information for PIP QI reporting only. Once the extract is created by following the steps in the Profile guides below, CAT4 can read the data, show the relevant report and can upload the de-identified data to their PHN.

Profile Integration With CAT4¹⁶

¹⁶ https://help.pencs.com.au/download/attachments/131268611/Profile%20Integration%20With%20CAT4.pdf? api=v2&modificationDate=1595986102643&version=1

PIP QI Reporting¹⁷

PIP QI Reporting - Release Notes V1.0¹⁸

¹⁷ https://help.pencs.com.au/download/attachments/131268611/PIP%20QI%20Reporting%20V%201.0.pdf? api=v2&modificationDate=1595986099927&version=1 18 https://help.pencs.com.au/download/attachments/131268611/PIP%20QI%20Reporting%20-%20Release%20Notes%20V1.0.pdf?

api=v2&modificationDate=1595986107407&version=1

2 INSTALLATION

The Clinical Audit Tool 4 is available using Microsoft Click-Once technology and can be installed by using **your web browser** with the following URL

http://install.pencs.com.au/ClickOnce/CAT4/publish.htm

Click the 'Install' button

-		
(←)) []	http://install.pencs.com.au/ClickOnce/CAT4/publish.htm 🔎 🗸 😋 🥔 PenCS Clinical Audit Tool 4 🛛 🗶	↑ ★ ☆
👍 🛃 PCS Rem	ote Support Soft	
Pen C	omputer Systems	
PenCS	Clinical Audit Tool 4	
Name:	PenCS Clinical Audit Tool 4	
Version:	4.0.3.0	
Publisher:	Pen Computer Systems	
Install		
	Pen Computer Systems Customer Support :: <u>ClickOnce and .NET Framework Resources</u>	

The application will be launched.



A dialog box will display showing you the progress of the install.



Once the install has completed the Clinical Audit Tool 4 Login screen will appear.

CAT 4	PenCS
Matthias	Need Support? FREECALL 1800 762 993
Password	www.pencs.com.au
Forgot your password?	Remote Support
LOGIN	
	Version: 4.0.3.0

Username and **Password** – enter the details provided to you. You can also reset your password by using the 'Forgot your password' link. This requires you to have registered with a valid email address. Please see part 2 – Functionality for details.

Click 'OK'. The first time you login the Default Data Directory dialog box below will pop up.



This lets you know that the folder 'C:\ClinicalAudit' on your PC will be used to store the 'snap-shots' of your data for analysis by the Clinical Audit Tool 4. If you prefer to store them somewhere else you can change this by selecting Edit > Preferences on the 'Clinical Audit' tab. Setting your preferences is explained in the next section: 'Setting Your Preferences'.

Click 'Ok'

Each time you install a new update of Clinical Audit a Disclaimer dialogue box will be displayed.

Tick that you accept the disclaimer (the 'OK' button will become active)

Click 'OK' to continue or 'Cancel'

Each time you install a new release of Clinical Audit a Release Notes dialogue box will be displayed. Click 'OK' to continue

2.1 Installing on a Desktop PC

Clinical Audit needs to be installed under each profile (login) that will be using it on the PC. That is, if multiple people log on to the one PC and they each want to use Clinical Audit the installation needs to be repeated for each login. The application generally only installs once but 'activates' itself for the other logins on additional installs.

2.2 Installing to Terminal Services or Citrix

The only differences to the preceding installation instructions are the following:

Clinical Audit needs to be installed on the SERVER

• Log on as the user via a Terminal Services or Citrix session and you will automatically be on the server. Follow the installation instructions in the preceding section.

Clinical Audit needs to be installed under each profile (login) that will be using it.

That is, if multiple people will be using it, the installation needs to be repeated for each login. The application generally only installs once but 'activates' itself for the other logins on additional installs.

• Log on as each user that will be using CAT4 and repeat the install instructions.

NOTE: If access privileges are an issue, then you will need to elevate the user's privileges to install and then restore them afterwards. This is a Microsoft configuration.

2.3 Using Clinical Audit Offline

You must install and login initially to Clinical Audit while connected to the Internet so your login details can be validated.

You can then use CAT4 without being connected to the Internet for a period of one month.

When you are connected to the Internet CAT4 is able to verify your registration credentials are still valid and check to see if there are any application updates available for download.

If you use CAT4 for a long period of time without connecting to the Internet then your credentials will eventually expire. You will need to connect again and go to the CAT4 installation URL to download an update.

Note: If you have a Desktop Shortcut to CAT4 and it does not work offline you simply need to delete and recreate it.

2.4 Installing in a Citrix Environment

Please note that while you can install and configure CAT4 as a remote app/in a Citrix environment PEN CS is not officially supporting this method of deployment. We can try and assist to make this work, but will not be able to guarantee that CAT4 will work in your specific Citrix setup!

In the Citrix environment all users are logging into **their profile on the Citrix Server** to access applications. The Clinical System is installed on the Citrix Server and therefore CAT4 needs to be installed here as well.

The applications are not running on the users local machine so CAT4 will not be able to connect to the Clinical System from the local machine if installed locally.

The CAT4 Settings are stored in the C:\ProgramData\Pen CS folder on the Citrix Server and will be accessible to all users.

Once CAT4 is installed on the Citrix Server it can be configured once and then the practice IT can publish the CAT4 application to all user profiles. All CAT4 instances will access the same CAT4 Settings file.

3 CONFIGURATION

- Setting Your Preferences(see page 48)
- Setting up CAT4 for Scheduler(see page 73)

Once the CAT4 software has been installed it is available from your Programs List.

Click Start > All Programs > Pen CS > PEN CS Clinical Audit 4

Enter your Account name and Authorisation key and click 'OK'.

Once you have logged in the screen below will display. From the dashboard you can choose which view of CAT4 you want to open – the CAT 4 icon on top will load the full suite of reports.



You will see the population figure is initially 0 because you have not yet collected data from your clinical desktop system.



3.1 Setting Your Preferences

- Choosing your Clinical Desktop System(see page 50)
- Choosing a preferred Data Extract Directory(see page 61)
- Choosing and configuring your Billing System(see page 63)
- Linking CAT4 to Topbar(see page 67)
- Patient Consent Withdrawn Settings(see page 71)

Your Preferences are set by selecting Edit > Preferences from the top menu.

PenC:	S Clinical Audit	Tool 4 - CAT 4						
File	Edit View	Tools Data	Submission	Prompts	Schedule	r Help		
	Preference Send Data	es Extracts Locati	ions	-		*		1
Collec	View t Extracts	View Filter	Report	View Population	Dashboard	CAT4	Cleansing CAT	Registrar CAT

The Preferences Dialog box will be displayed.

Mediflex To	opbar Sic	debar/P	rompts Sche	duler D	ata Subm	hission					
Clinical Audit	Best Pra	actice	Communicare	Ferret	Genie	Medical Director 3	Medinet	MedTech32	MMEX	practiX	Zedmed
GP Applic	ation					Medical Director 3				•	
Extract Dir	ectory					C:\ClinicalAudit\p2					
Saved Filt	ers Directo	ry				C:\ClinicalAudit\Sav	vedFilters				
Saved Vie	ws Directo	лу				C:\ClinicalAudit\Sav	vedViews				
Practice II)										
Practice N	ame										
Practice P	ostcode										
Run CAT i	n 64 bit ma	ode				Yes				•	

GP Application

From the drop down list select the Clinical Desktop System you wish to collect from. Then click the tab for that Clinical Desktop System to enter further values.

Extract Directory

This folder is used to store the 'snap-shots' of your data for analysis by the Clinical Audit Tool 4. By default the data will be stored in the folder 'C:\ClinicalAudit' on your PC. Pen CS recommends to store the data on a shared drive that is included in your regular backup. You can change this by clicking the 'Browse' button and choosing another Data Folder Location. Click 'OK' when you have selected a new location. Click 'OK' to save this location and close the Dialog box.

Saved Filters Directory

This folder is uses to store your saved filter criteria. Saved filters can be reloaded and run at a later time. Details are provided in the 'PEN CS Clinical Audit User Guide Part 2'.

Saved Views Directory

This folder is uses to store your saved views. Saved views can be reloaded and run at a later time. They can be created through the My CAT Wizard from the dashboard. Details are provided in the 'My CAT Wizard Quick Reference Guide'.

Practice Name, ID Number and Postcode

Fill in the values for these fields with your practice details. At a future time these values will be used if your practice decides to participate in projects that send consented, de-identified patient clinical data to your Division or other data repository. The postcode is used to establish the public holidays for your state which are used in the after hours report.

Run CAT in 64 bit mode

This option will only show on 64 bit operating systems and the default setting is 'Yes'. In some instances this might have to be set to 'No' by Pen CS support if there problems are occurring. Don't change unless advised to do so.

3.1.1 Choosing your Clinical Desktop System

Once you have selected your Clinical Desktop System from the 'Clinical Audit' tab, click the corresponding tab for that Clinical Desktop System to enter further configuration options.

Eg. GP Application 'Medical Director' selected, now click the corresponding tab



The options available for each system are explained in the following pages. Values will be defaulted where possible. Once you have selected and configured your Clinical Desktop system the details will be displayed above the row of tabs.

Clinical Desktop System Database Location

Clinical De	sktop Syste	em Dai	tabase Locat	tion					
	PenCS (Clinical Audit	Tool 4 - CAT	4					
	File Ed	dit View	Tools Data	Submission	Prompts	Scheduler	Help		
	Collect Medical D	View Extracts	Mew Filter Live Data	Report	View Population	Dashboard	CAT4	Cleansing CAT	Registrar CAT

There are a number of clinical systems that can work with third party billing systems. The billing system can configured on the respective tab of the clinical system to match the setup at the clinic. If no billing system is

configured, CAT4 will not display any MBS item reports. This is explained further in the section 4.1.3.

Medical Director 3

Select your Database Configuration from the drop-down list. These will match the configurations you have available through the 'HCN Maintenance' icon on your desktop. You can also change the settings for extracting archived and deceased patients which by default is set to 'No'. This is generally not needed in General Practice but is required for the NKPI report¹⁹. The Location list settings is relevant for clinics that share one server for multiple locations - more details are described here: CAT4 MD3 Collection by Location²⁰

Please note that the "Progress Note Batch Size" settings are only required if there is a problem with corrupt tables in your MD3 installation. Please contact Pen CS support to assist if you are experiencing issues with no active patients showing in your CAT4.

¹⁹ https://help.pencs.com.au/display/CG/National+KPI+Report

²⁰ https://help.pencs.com.au/display/CG/MD3+Data+Collection+by+Location

Clinical Audit Preferences									
MedTech32 MMEX practiX Zedmed Mediflex Medilink Clinical Audit Refugee Health Best Practice Communicare	The Practice Scheduler Data Submission Topbar Ferret Genie GPComplete Medical Director 3 Medinet								
Local AZdex Directory C:\Program Files (x86)\Health Communication Network\Med									
Database Configuration	MD Live Data								
Database Server (optional override)									
Database Server Note	If you change the server you will need to restart CAT to refresh the Location List.								
Document Server	C:\ManageEzy\								
Document Library	HCN								
Billing Software	Pracsoft 3								
Mediflex/Medilink/The Practice Note	If you are using Medical Director 3 and Mediflex, Medilink or The Practice, please check the relevant tab to ensure the 'Application Directory' Setting is correct.								
Progress Note Batch Size (optional override)									
Progress Note Batch Size Note	This setting is only required where the extract contains no Active patients. This is caused by a Progress Notes table indexing error that can be resolved using batching.								
Extract Archived and Deceased Patients	No								
Practice Location List (comma separated) (Enter ALL for a single extract, IND for an extract per Pracsoft location)									
Program Location List (comma separated) Prefix entered in patient record no (Enter ALL for a single extract)									
	OK Cancel								

Best Practice

Select either 'Live Data' or 'Sample Data' from the drop down list. In Best Practice you need to have allowed database access using one of the following options:

With the JADE release BP has introduced a partner program where the partner details have to be configured in BP.

Under Setup/Configuration:



Got to Database and pick the 'Setup third-party integrations' button:

🤾 Configuration			×
S	^	The following list of servers that have an instance of Bp Premier installed were found. Please select the one that this computer will be connecting to.	
General		Servers Find Servers	
Results import			
Database		Connect to:	
		(local) Change	
Lists		Passwords:	
		Database browser Emergency patient access	
Reminders		External data	
		Clinical Billing Appointments	
		Setup third-party integrations	
Care plans		Drug database	
\bigcirc		Backup drug database at the end of a data update	
Email		C:\ProgramData\Best Practice\Backup\ Set Folder	
		Delete local copy of drug database	
			_
Bp Comms	~	Save Cancel	

The following screen will show a list of third party providers (subject to change):

Tick the box next to PEN CS to setup the integration with CAT4, then click on 'Save'.

R	Setup third party integrations
Th Yo se	ne third-party software providers listed below are members of the Best Practice Partner Network. Sou will need to approve partners by selecting them from the list if you would like to grant them cure access to your Bp Premier data.
1	Third-party providers
	AutoMed Systems
	BPAC Clinical Solutions
	Doctors Control Panel
[HotDoc
	Javex
	MyHealth1st
	Pen CS
	Deselect all Save Cancel

• For older versions of BP (prior to the JADE Edition):

Option 1: Configuring a BP Database Browser password -> Enter that password in the preferences Option 2: Ticking the 'External data access' checkboxes in Best Practice -> Leave the password preference field empty

You can also change the settings for extracting archived and deceased patients which by default is set to 'No'. This is generally not needed in General Practice but is required for the NKPI report²¹. The Location list settings is relevant for clinics that share one server for multiple locations - more details are described here: Best Practice Data Collection by Location²²

Communicare

On the Communicare tab under Edit/Preferences you will need to configure the Communicare directory (usually C: \Communicare) and you will need to enter the login details of a Communicare administrator account to be able to run the data collection. The extractor needs to be present in your Communicare folder - please also see here: Communicare Requirements(see page 37)

²¹ https://help.pencs.com.au/display/CG/National+KPI+Report

²² https://help.pencs.com.au/display/CG/Best+Practice+Data+Collection+by+Location

Clinical Audit Preferences	
Mediflex The Practice Sidebar/Prompts Scheduler Data	Submission Topbar
Clinical Audit Best Practice Communicare Ferret Genie	Medical Director 3 Medinet MedTech32 MMEX practX Zedmed
Local Communicare Directory	c:\communicare
Username	Admin
Password	•••••
Note	Please browse to your local Communicare installation directory. This will usually be C:\Communicare.
	You are required to enter your Communicare login details if you wish to login automatically to the CAT exporter and be able to configure scheduled collections.
	-
	OK Cancel

Genie

There is no further set up for Genie.

The Genie software application itself provides a new Reports menu option that performs the data extraction for Clinical Audit. This is described in the Genie Mappings document available from Genie Mapping²³

The Genie preference tab summarises the steps you should follow.

Ensure the Extract Directory on the 'Clinical Audit' tab matches the extract folder chosen in Genie.

Zedmed

The Zedmed and Zedmed data directory should have populated with your install locations, if the locations are not correct you can change the folder to match your settings. We recommend to leave the default settings unless you are experiencing problems with the data collection. To enable CAT4 to extract pathology results it needs to access the Blobs folder. This folder is used by Zedmed to store HL7 based data. The default location is c: \zedmeddata\blobs but this can vary depending on your installation – to verify the location you can check

²³ https://help.pencs.com.au/display/ADM/Genie+Data+Mapping

CRS_App_Server.ini (which may be in a folder called ZedmedServer) which should have an entry called *BLOBFilesPath=C:\ZedmedData\Blobs*

Zedmed has advised Pen CS that they have made some changes in Zedmed v29 to improve data security by introducing an Integrator Account. What this means is that the current connections strings Pen CS uses to access the Zedmed database for data collections need to be replaced to use the new Integrator Account.

Pen CS will be making changes in CAT4 and Topbar to enable this change.

What will practices need to do?

- 1. Practices will need to set up their Integrator Password as required by Zedmed.
- 2. Practices will need to update their CAT4 configuration settings with the Integrator Password.

In order for CAT4 and Topbar to continue functioning, there is a transition window for practices to update their configuration but they must have updated before they upgrade to Zedmed v30.3.

Use the 'Test Integrator Password' button to check if your password is valid.

You can also change the settings for extracting archived and deceased patients which by default is set to 'No'. This is generally not needed in General Practice but is required for the NKPI report²⁴.

²⁴ https://help.pencs.com.au/display/CG/National+KPI+Report

Olinical Audit Preferences	- 🗆 ×
Clinical Audit Refugee Health Best Practice Communicate MedTech32 MMEX practiX StatHealth Zedmed Medifi	Ferret Genie GPComplete Medical Director 3 Medinet ex Medilink The Practice Scheduler Data Submission Topbar
Local Zedmed Directory Zedmed Directory Note	C:\Zedmed Please browse to your local Zedmed installation directory. This will usually be C:\Zedmed or C:\Patients
Local Zedmed Data Directory Data Directory Note	C:\ZedmedData\Blobs Please browse to your Zedmed Blobs directory. This may be C:\ZedmedData\Blobs or a folder on your Zedmed server.
Password	Test Integrator Password
Password Note	The Zedmed installer will have prompted you to create a password for the Integrator account when you installed Zedmed version 29 or later. If you have Zedmed version 30.3 or later, this password is required to use CAT. If you do not remember this password, you can ask Zedmed to reset it for you.
Extract Archived and Deceased Patients Batch Size	No ~ 5000
	OK Cancel

practiX

There is no further set up for practix.

The practiX software application itself provides a new Administration menu option that performs the data extraction for Clinical Audit. This is described in the practiX Mappings document available from PractiX Mapping²⁵. The practiX preference tab summarises the steps you should follow.

Ensure the **Extract Directory** on the 'Clinical Audit' tab matches the extract folder determined by practiX.

Communicare

Browse to the local Communicare installation directory. Enter your Communicare login details to allow automatic login to the exporter.

²⁵ https://help.pencs.com.au/display/ADM/practiX+Data+Mapping

Please note that this needs to be a Communicare user with administrator privileges!

Clinical Audit	Best Practice	Communicare	Genie	Medical Director 2	Medical Director 3	Medinet	practiX	Zedmed	1
Local Comr	municare Directo	ory		C:\Program Fil	les\Communicare				
Usemame				Administrator					10
Password								1	
Note				Please browse to your local Communicare installation directory. This will usually be C:\Communicare.					
				You are require if you wish to lo be able to con	ed to enter your Comr ogin automatically to t figure scheduled colle	nunicare lo he CAT ex ections.	ogin <mark>details</mark> porter and		
								9 18	

Medinet

There is no further set up for Medinet.

The Medinet software application itself provides a new Resources menu option that performs the data extraction for Clinical Audit. This is described in the Medinet Mappings document available from Medinet Mapping²⁶. The Medinet preference tab summarises the steps you should follow.

MedTech32

Select either 'Live Data' or 'Sample Data' from the drop down list. Browse to the MedTech32 CAT4 extractor installation directory.

²⁶ https://help.pencs.com.au/display/ADM/Medinet+Data+Mapping

Communicare	Ferret	Genie	Medical Director 2	Medical Director 3	Medinet	MedTech32	practiX 4
Database C	onfigurati	ion		Live Data			•
Local MedT	ech32 C	AT Extrac	ctor Directory				· · · · ·
Note		Please browse to you Extractor installation of be C:\Program Files\I Limited\MT2PENCAT	r local Meo directory. T Medtech G F	dTech32 CAT his will usually ilobal			

MMEx

Following the CAT installation for MMEx practice, perform the manual collection within MMEx. Practice can follow the steps listed in the CAT configuration window.

Clinic	al Aud	lit Pre	ferences									_		×
practiX	Stat	lealth	Zedmed	Mediflex	Medilink	The Pra	ctice	Scheduler	Data Submission	Topbar	Profile	EMR	ł	
Clinical /	Audit	Best	Practice	Communicar	e Ferret	Genie	GPO	Complete	Medical Director 3	Medinet	MedTeo	h32	MMEX	
Collect	Audit ction In	Best	ion	Communicar	e Ferret	Genie	GPC The these Clic Clic Clic Clic Clic Clic Clic Clic	Complete I e Data Collect se steps: gin to MMEX sk on 'Report sk on 'Clinica t the collection nive' Button. zip the dowr py the unzipp default is set	Vedical Director 3 tion is done via MM (portal ts' button al Audit Export Repo on time period and (aloaded file. bed files in to the Cl to C:\Clinical Audit	Medinet IEX - Pleas ort' link Click on 'E	MedTec se follow xport to t Folder. 1	This	MMEX	
											OK		Ca	incel

3.1.2 Choosing a preferred Data Extract Directory

If there are more than one CAT4 user in the practice then choose a **network drive** that is accessible to all. We recommend to use a network or shared drive that is included in your routine backups even if there is only one CAT4 user. If there are more than one user ensure that the selected location is accessible to all users. Use the 'Edit > Preferences' option to set the same 'Extract Directory' for each user.

Olinical Audit Preferences					—		×
MedTech32 MMEX practiX StatHealt Clinical Audit Refugee Health Best Prac	h Zedmed Medifi tice Communicare	ex Medilin Ferret G	The Practice	Scheduler te Medical	Data Submission Director 3 Med	n Topbar inet	
GP Application		Medical Di	rector 3			/	
Extract Directory		C:\Clinical	Audit				
Saved Filters Directory		C:\Clinical	Audit\SavedFilters				
Saved Program Views Directory		C:\Clinical	Audit\SavedProgra	amViews			
Saved Views Directory		C:\Clinical/	Audit\SavedViews				
Practice ID						7	
Practice Name							
Practice Postcode							
Patient Consent Withdrawn File Directory	1	C:\Clinical	Audit \Settings				
Patient Consent Withdrawn File Directory	/ Note	It is recomr that all CA	nended that this di Γusers have acce	irectory is set ss to.	to a shared folde	er	
Run CAT in 64 bit mode		Yes				/	
					ОК	Ca	ncel

More than 1 user can work with the same snapshot at the same time.

All directories should be configured to be on the server where CAT4 is installed and extracts are saved. Please make sure that all CAT4 users have access to the extract folder, as otherwise no data will be visible on the workstation.

Genie/practiX users will need to make sure this folder matches the folder they select from the Genie/practiX application when they do the extract.

3.1.3 Choosing and configuring your Billing System

The following billing systems are supported:

- MD3 and Pracsoft OR Best Practice Management OR Mediflex OR Zedmed OR 'The Practice'
- BP and BP Management OR Pracsoft OR Mediflex OR Zedmed OR 'The Practice'
- practiX
- Communicare
- Zedmed
- MedTech32
- MMEx

MD and BP users will need to configure their preferences for their Billing Software. **MedicalDirector 3**

Go to the Medical Director 3 tab. Choose your billing system from the Billing Software drop-down list

Olinical Audit Preferences	
Mediflex The Practice Sidebar/Prompts Scheduler Data	Submission Topbar
Clinical Audit Best Practice Communicare Ferret Genie	Medical Director 3 Medinet MedTech32 MMEX practX Zedmed
Local AZdex Directory	C:\Program Files (x86)\Health Communication Network\Mec
Database Configuration	HCN Live Data
Document Server	C:\ManageEzy\
Document Library	HCN
Billing Software	
Mediflex/The Practice Note	Pracsoft 3 Mediflex Zedmed The Practice Other
Extract Archived and Deceased Patients	No
Location List (comma separated, Enter ALL for a single extract, IND for an extract per Pracsoft location)	
	OK Cancel

BestPractice

Go to the BestPractice tab. Choose your billing system from the Billing Software drop-down list

Clinical Audit Preferences	
Mediflex The Practice Sidebar/Prompts Scheduler Data	Submission Topbar
Clinical Audit Best Practice Communicare Ferret Genie	Medical Director 3 Medinet MedTech32 MMEX practiX Zedmed
Local AZdex Directory	C:\Program Files (x86)\Health Communication Network\Mec]
Database Configuration	HCN Live Data 🗸
Document Server	C:\ManageEzy\
Document Library	HCN
Billing Software	▼
Mediflex/The Practice Note	Pracsoft 3 Mediflex Zedmed The Practice Other
Extract Archived and Deceased Patients	No
Location List (comma separated, Enter ALL for a single extract, IND for an extract per Pracsoft location)	
	OK Cancel

Mediflex users

From the Mediflex tab: Configure the 'Application Directory' to point to the Mediflex folder which will usually be C: \VMF\Programs. This can be different depending on your setup and the VMF folder might be in a different location. You can locate the VMF folder by right-clicking on the Mediflex icon and then on 'Properties' - in the example below it is on the F: drive

🚏 Visual MediFl	ex 9 Properties	×					
Security General	Details Previous Versions Shortcut Compatibility						
	Visual MediFlex 9						
Target type:	Application						
Target location:	: Programs						
Target:	F:\VMF\Programs\MediFlex.EXE						
Start in:	F:\VMF\Programs						
Shortcut key:	None						
Run:	Normal window	•					
Comment:	Visual MediFlex Version 9.1.1						
Open File L	ocation Change Icon Advanced						
	OK Cancel App	y .					

. We don't recommend to extract more than 2 years due to the memory requirements of the extraction.

Please ensure that you set the correct billing system for your clinical system, i.e. for MD3 or BestPractice on the respective configuration tab in the CAT4 preferences.

Clinical Audit Preferences	
Clinical Audit Best Practice Communicare Ferret Genie Mediflex The Practice Sidebar/Prompts Scheduler Data	Medical Director 3 Medinet MedTech32 MMEX practiX Zedmed Submission Topbar
Application Directory	C:WMF\Programs
Note	Please browse to your local Mediflex application directory. This will usually be VMF\Programs. It requires the PenCS.exe to be installed.
Number Years To Extract	2
	OK Cancel

If the Mediflex extractor is missing from your system or the folder is not configured correctly, the following error message will be displayed. Please contact Mediflex so they can install the utility for you.



'The Practice' users

From the 'The Practice' tab: Configure the 'Application Directory' to point to the correct folder which will usually be C:\ThePractice. To be able to extract Medicare information from 'The Practice' you have to have the file 'ThePracticePenCS.exe' installed which you can obtain from the software vendor.

Please ensure that you set the correct billing system for your clinical system, i.e. for MD3 or BestPractice on the respective configuration tab in the CAT4 preferences.

Clinical Audit Preferences	
Clinical Audit Best Practice Communicare Ferret Genie	Medical Director 3 Medinet MedTech32 MMEX practiX Zedmed
Mediflex The Practice Sidebar/Prompts Scheduler Data	Submission Topbar
Billing Integration Only Note	The Practice is available for Billing integration only with Medical Director 3 and Best Practice.
Application Directory	C:\ThePractice
Note	Please browse to your local The Practice application directory. This will usually be C:\ThePractice. It requires the ThePracticePenCS.exe to be installed.
Number Years To Extract	6
	OK Cancel

3.1.4 Linking CAT4 to Topbar

If you are using Topbar, our decision support tool for General Practice, you can link CAT4 to Topbar. This will allow for future functionality and currently enables a link between the Topbar Cleansing App and the Cleansing View in CAT4. The Cleansing App in Topbar applies the same rules and algorithms as the Cleansing View in CAT4 to the patient currently open in the clinical system (currently MD3 and BestPractice).

The Cleansing App in Topbar and the Cleansing View in CAT4 display indicated conditions without a coded diagnosis, currently these conditions are checked:

- Diabetes
- COPD
- Chronic Kidney Disease (CKD)
- Mental Health

CAT4 shows a report for all patients in the practice meeting the criteria and Topbar applies the same criteria only for the patient currently open in the clinical system.

A clinician can use the Cleansing App in Topbar or the Cleansing View in CAT4 to mark a patient as NOT having an indicated condition – this will be stored in the Topbar system and will prevent the patient to be displayed again in either CAT4 or Topbar as being indicated for the selected condition. Please refer to the Cleansing View QRG and the Cleansing App QRG, available respectively from help.pencs.com.au/cat.htm²⁷ and from help.pencs.com.au/ topbar.htm²⁸ for full details.

To configure CAT4 to work with Topbar click on the Topbar tab in the preferences, then click on 'Edit'.

²⁷ http://help.pencs.com.au/cat.htm

²⁸ http://help.pencs.com.au/topbar.htm

Please note that you have to have Topbar installed and running on the machine you are configuring the link between the two applications.

Clinical Audit Tool 4 - Preferences	
Clinical Audit Best Practice Communicare Fe Mediflex Improvement Foundation MSM STI	erret MMEX Genie Medical Director 3 Medinet MedTech32 practX Zedmed Topbar Sidebar/Prompts Scheduler Data Submission
Connection Status Configure Topbar Connection	Server: Port: Edit
	OK Cancel

Image 26: Configure CAT4 and Topbar link

Clicking on the 'Edit' button will open a new window:

Change Topbar Connection			
Click the following button to try and automatically find the Topbar database. (This will only work if the database is on this machine or if Topbar is also installed on this machine)			
Find Topbar Database			
Please use the input boxes below to manually specify the server and port for the Topbar server.			
Server:			
Port (Optional):			
Test Connection			
	,		
UK Cancel			

Image 27: CAT4 Topbar Details

For standard installations the 'Find Topbar Database' button should work and automatically locate the Topbar database. If your installation is not standard you might have to manually configure the server name/IP address and port – please contact our support desk if you problems connecting to your Topbar database. Depending on network and computer speed the search can take some time – the following message will alert you to this. Click on Yes to start the search.



Image 28: CAT4 Topbar Connection Warning

Once the Topbar server is found a new message will display the server name and port (if configured). In this example the default settings were used when installing Topbar so the server is called 'localhost' and no specific port was configured. Click on 'OK' to continue.

Topbar Connection
Connection found on localhost with port <none></none>
ОК

Image 29: CAT4 Topbar Server Found

You can test the connection by clicking on 'Test Connection' – a new message will pop up that it could take some time, followed by a success message if your server has been located and the connection established.

If the connection is established you will see this message after clicking on the 'Yes' button

Topbar Connection
Connection Successful!
ОК

Image 30: Topbar Connection Success

Warning	x
Warning: Testing a connection car Do you wish to continue?	n sometimes take up to 1 minute.
	Yes No

Image 31: Testing Connection Warning

If the connection fails, the message below will be displayed – please contact our support team for assistance.

Connection to TopBar Database Warning	
The connection failed. Would you like Cleansing CAT to try searching ports?	more
Yes	No

Image 32: Topbar Connection Failure

After successful configuration you will see another message about the need to open and close the CAT4 preferences window to see the changed settings:



Image 33: Topbar Link Updated Settings

After closing and re-opening the preferences window the Topbar tab will now show the server name and, if configured, the port.

Clinical Audit Tool 4 - Preferences		ζ
Clinical Audit Best Practice Communicare Fe Mediflex Improvement Foundation MSM STI Connection Status Configure Topbar Connection	ret MMEX Genie Medical Director 3 Medinet MedTech32 practix Zedmed Topbar Sidebar/Prompts Scheduler Data Submission Server: localhost Port: Edit	
	OK Cancel	

Image 34: CAT4 Topbar Link Configured

3.1.5 Patient Consent Withdrawn Settings

To configure CAT4 correctly for patients who withdraw consent in sharing their data with anyone outside the clinic, the location for the file that contains this data needs to be configured.

This is done through the Edit/Preference menu:

Then click on the 'Data Submission' tab where the 'Patient Consent Withdrawn File Directory' settings are located. Set the location to a folder that is accessible for all CAT4 users at the practice.
Olinical Audit Preferences	
practX Zedmed Mediflex The Practice SMS/Prompts S Clinical Audit Best Practice Communicare Ferret Genie	Scheduler Data Submission Topbar GPComplete Medical Director 3 Medinet MedTech32 MMEX
GP Application	Medical Director 3
Extract Directory	C:\ClinicalAudit\p2
Saved Filters Directory	C:\ClinicalAudit\SavedFilters
Saved Program Views Directory	C:\ClinicalAudit\p2\SavedProgramViews
Saved Views Directory	C:\ClinicalAudit\SavedViews
Practice ID	
Practice Name	
Practice Postcode	
Patient Consent Withdrawn File Directory	C:\ClinicalAudit\Settings
Patient Consent Withdrawn File Directory Note	It is recommended that this directory is set to a shared folder that all CAT users have access to.
Run CAT in 64 bit mode	Yes 🔹
	OK Cancel

If this folder location is not identical for all CAT4 instances at the clinic (this includes the CAT4 install for scheduled collections which might be installed on your server) the information about withdrawn consent might be inconsistent, as each CAT4 instance can only use the one location specified. Please make sure that this setting is identical for all CAT4 users!

3.2 Setting up CAT4 for Scheduler

The CAT4 scheduler preferences allow users to set the working folder. This folder is where CAT4 can update scheduled tasks and retrieve the scheduler history. It is monitored by the 'PEN CS Scheduler Service' so that scheduled tasks are run when required.

• CAT4 will automatically look for the default folder **'C:\Program Files\Pen Computer Systems\PEN CS Scheduler Service'**. If this folder is found and the preferences working folder is empty CAT4 will prepopulate the preference. If you are working on a 64bit system the folder will be called C:\Program Files (x86)\Pen Computer Systems\PEN CS Scheduler Service If you do not have Scheduler as a CAT4 menu option as shown below, you will need to configure the CAT4 Scheduler Preferences screen.

📢 Pen	CS CAT	1 <mark>4 -</mark> CAT4							
File	Edit	View	Tools	Data Submission	Prompts	Schedule	r Help		
Coll	ect	View Extracts	ر Mew F	iller Report	View Population	() Dashboard	CAT4	Cleansing CAT	Registrar CAT

Follow the steps below to set up CAT4 for Scheduler

- 1. Open CAT4
- 2. Click the Edit > Preferences menu
- 3. From the Clinical Audit Preferences dialog choose the Scheduler tab
- 4. Note: If the Scheduler tab is not visible (due to your window size) a right arrow key will be available to scroll across. Alternatively, you can widen the window.

Scheduler Working Folder Directory should be automatically populated as C:*Program files(x86)**Pen Computer Systems**PCS Scheduler.*

The specific **User Name** and **Password** for a practice is to be obtained from Pen CS *Support* for installation purpose only.

Clinical Audit Preferences	
Clinical Audit Best Practice Communicare Ferret Genie	Medical Director 3 Medinet MedTech32 MMEX practiX Zedmed
Mediflex Sidebar/Prompts Scheduler Data Submission T	opbar
Scheduler Working Folder Directory	C:\Program Files (x86)\Pen Computer Systems\PCS Schedu
Scheduler Dedicated CAT Account Note	This is the account credentials that the Scheduled CAT collections will run under.
User Name	
Password	
	Validate Account
	OK Cancel

Once User Name and Password are filled in here, click the Validate Account button.

Clinical Audit Preferences	
Clinical Audit Best Practice Communicare Ferret Genie Mediflex Sidebar/Prompts Scheduler Data Submission T	Medical Director 3 Medinet MedTech32 MMEX practiX Zedmed
Scheduler Working Folder Directory	C:\Program Files (x86)\Pen Computer Systems\PCS Schedu
Scheduler Dedicated CAT Account Note	This is the account credentials that the Scheduled CAT collections will run under.
User Name	scheduler.1000
Password	•••••
	Validate Account
	OK Cancel

Click **OK** to close the Scheduled Collection message box, which displays that the *Account credentials verified and* saved successfully.

If the account details can't be verified please contact Pen CS support.

🔇 Clinical Audit Preferences	
Clinical Audit Best Practice Communicare Ferret Genie Medical Director 3 Medinet MedTech32 MMEX pressure Mediflex Sidebar/Prompts Scheduler Data Submission Topbar Topbar	ractiX Zedmed
Scheduler Working Folder Directory C:\Program Files (x86)\Pen Computer Systems\PCS Sche	edu
Scheduler Dedicated CAT Account Note This is the account credentials that the Scheduled CAT collections will run under.	
User Name Password Viser Name Scheduled Collection Image: Collection Image: Colle	
ОК	Cancel

Click **OK** for the *Clinical Audit Preferences* dialog box to close.

Clinical Audit Preferences	
Clinical Audit Best Practice Communicare Ferret Genie Mediflex Sidebar/Prompts Scheduler Data Submission Tr	Medical Director 3 Medinet MedTech32 MMEX practiX Zedmed
Scheduler Working Folder Directory	C:\Program Files (x86)\Pen Computer Systems\PCS Schedu
Scheduler Dedicated CAT Account Note	This is the account credentials that the Scheduled CAT collections will run under.
User Name	scheduler.1000
Password	•••••
	Validate Account
	OK Cancel

3.2.1 Using Scheduler for Multiple Locations on one Server

This configuration is for sending location filtered extracts to ACCHOs/PHNs that have the new PAT CAT (version 3.2). It allows you to be logged in to CAT4 as a single user and send different location files to their correct PAT CAT practice account. These accounts may span more than one PAT CAT.

For each ACCHO/PHN there will need to be a 'Send to PAT' location set up. Only the webservice needs to be entered. PAT 3.2 is aligned with our Licencing database and recognises which OrganisationIDs belong to it. Locations based on your clinical system as described here: BestPractice: CAT4 Best Practice Collection by Location(see page 78) and MD3: CAT4 MD Pracsoft Collection by Location²⁹ have to be configured prior to setting up the scheduled uploads and collections.

- Under the CAT Preferences > Scheduler there is now the ability to enter the user credentials for one or more locations
- The locations already configured in CAT4 under Edit/Preferences will appear as check boxes within the Location selection box
- Tick a location and enter the Account and Password details for the associated practice the designated scheduler credentials for a practice should be used these are unique for each practice

²⁹ https://help.pencs.com.au/display/CG/CAT4+MD+Pracsoft+Collection+by+Location

• Click Add

For manual upload, load the extract you want to send to PAT CAT from the extracts panel in CAT4 and Right-click on the extract name and choose the PHN PAT CAT the practice belongs to.

CAT will send the extract with the OrganisationID for the credentials you have configured for that location.

PAT CAT will check it has the OrganisationID and only accept the extract if does (so if you accidently send to the wrong PHN it will be rejected.

Setting up collections for multiple accounts can get a bit complicated and we strongly recommend to contact our support team to assist with this process.

Clinical Audit Best Practice Communicare Ferret Genie	Medical Director 3 Medinet MedTech32	MMEX practiX	Zedmed	
Medifiex The Practice SMS/Prompts Scheduler Data S Scheduler Working Folder Directory Scheduler Dedicated CAT Account Note User Name Password Multiple Locations CAT has detected that you have configured multiple locations for extraction. Scheduler multiple	iubmission Topbar C:\Program Files (x86)\Pen Computer Systems This is the account credentials that the Schedicollections will run under. christine.chidgey ••••••• Validate Account If these extracts are being sent to your PHN P/ will need to configure the user account associate ach location. Configure Accounts	PCS Schedu	Configure Accounts Configure Accounts SURG1+SURG2+SURG3 Location	Add Delete
	[ОК	Cancel	

4 USER INTERFACE

Once the CAT4 software has been installed it is available from your Programs List.

- Click Start > All Programs > Pen CS > PEN CS Clinical Audit
- Enter your Account name and Authorisation key and click 'OK'.

Please use the links below for the details of the user interface.

Starting CAT4³⁰ Password retrieval³¹ Users working at multiple locations³² License lock-down³³ CAT4 Dashboard³⁴ Navigating the CAT4 User Interface³⁵ Switching Views³⁶

³⁰ https://help.pencs.com.au/display/CG/Starting+CAT4

³¹ https://help.pencs.com.au/display/CG/Password+retrieval

 $^{{\}tt 32\,https://help.pencs.com.au/display/CG/Users+working+at+multiple+locations}$

³³ https://help.pencs.com.au/display/CG/Licence+lockdown

³⁴ https://help.pencs.com.au/display/CG/CAT4+Dashboard 35 https://help.pencs.com.au/display/CG/Navigating+the+CAT4+User+Interface

³⁶ https://help.pencs.com.au/display/CG/Switching+Views

5 COLLECTING DATA SETS

NOTE: Before you start collecting data ensure you have set up your preferences to point to the correct clinical desktop system for your practice

See Setting Your Preferences(see page 48) for details about how to do this.

Once you click the 'Collect' button you will see the 'status bar' in the top right hand corner of the screen flashing while the data is retrieved from the clinical desktop system.

- Genie, practiX, Medinet, Medtech and MMEx users please note that the data collection is performed from within your clinical application. Clicking the CAT4 'Collect' button at the top left of the screen will provide you with the summary steps on how this is done for your system. Step by step details are provided here: Choosing your Clinical Desktop System(see page 50)
- Zedmed users please note that to enable CAT4 to extract this data it needs to access the Blobs folder. This folder is used by Zedmed to store HL7 based data. The default location is c:\zedmeddata\blobs but this can vary depending on your installation – to verify the location you can check CRS_App_Server.ini (which may be in a folder called ZedmedServer) which should have an entry called BLOBFilesPath=C:\ZedmedData\Blobs{color}

The data set collected is saved in your preferred data folder (see 'Setting Your Preferences' for more information).

When the data retrieval has completed you will see an entry in the left hand column. The data is stored as a 'snap-shot' on your PC. You can use this 'snap-shot' for analysis at any time in the future.

Tip: To refresh the list of 'snap-shots' toggle the 'hide/view Extracts' button.

Each entry displays the date/time of collection, the number of records retrieved and the machine name on which the collection was done.

The tick box on top of the panel allows you to hide deidentified extracts to only show extracts containing your patient details.



Tip: To refresh the list of 'snapshots' toggle the Hide/View Extracts button.

Pen CS C/	AT4 - CAT	4																
File Edit	View	Tools	Data Sub	mission	Pron	npts Schedul	er Help	p										
Collect	Hide Extracts	utton View I	-ilter -	Report	View Populat	on Dashboard	CAT4	Cleansing CAT	Registrar CAT							Clear Filt	ers Recalculat	Status Bar
Hide De	hide/	view de xtracts	identifie	d data		Medical Director	3, MD Live	e Data; Extract	Date: 01/08/201	8 3:09 AM;	Filtering By	MBS (23	- Yes), Cond	itions (Diabe	tes - No)			
						Demographics	Ethnicity	Data Quality	Data Cleansing	Allergies	Smoking	Alcohol	Measures	Pathology	Disease	Screening	Co-morbidities	Medications 1
28/08/18 8	:39 AM	68	WIN7VM	Extract	ts	Population Pyra	amid Age	Profile (RACGI	P)									
27/08/18 3	:17 PM	68	WIN7VM			Select All	Show	Total Counts								Export	Age bracket	5 🚔 Print
27/08/18 3	:14 PM	68	WIN7VM															

12/06/2008 12:56 PM	11776	PENMLB_01
10/06/2008 12:40 PM	11776	PENMLB_01

Each data set entry displays the date/time of collection, the number of records retrieved, and the machine name on which the collection was performed.

There is no limit to the number of data sets you can collect. Each data set will be listed as an entry in the left hand panel.

To analyse a specific data set, click on the entry for that data set. It will become highlighted and you will see the 'status bar' in the top right hand corner of the screen flashing while the data is reloaded from the 'snapshot' into CAT4.

6 INSTALL FROM MSI INSTALLER

This installer is provided upon request by PEN CS for users with non standard system setups such as Citrix or large terminal server or similar environments. Unlike the standard click-once CAT4 installer, this installer requires administrator privileges and can be install for all users. Particularly in larger organisations this will save time for the IT support team and enable the creation of application links in Citrix.

However there are some disadvantages with the main one being that the MSI installer doesn't auto-update. Pen CS is emailing a notification with a download link to all registered MSI CAT4 users, usually shortly after the release of an update to the click-once version. This update needs to be manually installed following the steps below.

(i) Pen CS does not explicitly support Citrix or other custom environments, but from our experience those organisations using custom setups normally are easily able to install CAT4 from the MSI installer.

To install CAT4 from MSI please download the latest version of the installer as per the update email. The installer will be a compressed (zipped) file containing two files, one called ClinicalAuditSetup.msi and one called Setup.exe

Name Date modified Type Size P ClinicalAuditSetup 27/06/2016 9:29 AM Windows Installer 17,340 KB P seture 27/06/2016 0:28 AM Application 466 KB	der			
ClinicalAuditSetup 27/06/2016 9:29 AM Windows Installer 17,340 KB	Name	Date modified	Туре	Size
27/06/2016 0-28 AM Application 466 KP	😽 ClinicalAuditSetup	27/06/2016 9:29 AM	Windows Installer	17,340 KB
27/00/2010 9:28 AM Application 400 KB	📚 setup	27/06/2016 9:28 AM	Application	466 KB

After the successful download uninstall the old version through the control panel/add or remove programs, then install CAT4 by running the Setup.exe.

Clicking on 'Setup.exe' will display a number of windows:

Windows Installer	
Preparing to install	
	Cancel

The installer will check if you have uninstalled the previous version and will display a warning if that is not the case:



Then the installation will start when you click on 'Next':

B PCS Clinical Audit	
Welcome to the PCS Clinical Audit Setup Wizar	d 🌆
The installer will guide you through the steps required to install PCS Clinical Audit	on your computer.
WARNING: This computer program is protected by copyright law and internation Unauthorized duplication or distribution of this program, or any portion of it, may r or criminal penalties, and will be prosecuted to the maximum extent possible und	al treaties. esult in severe civil er the law.
Cancel < <u>B</u> ack	Next >

Select your preferred installation folder or leave the default folder (recommended) and select the appropriate users, either just for yourself or for all users (Everyone):

B PCS Clinical Audit	
Select Installation Folder	5
The installer will install PCS Clinical Audit to the following folder.	
To install in this folder, click "Next". To install to a different folder, enter it below	v or click "Browse".
Eolder: C:\Program Files\PCS\PCS Clinical Audit\	Browse
	<u>D</u> isk Cost
Install PCS Clinical Audit for yourself, or for anyone who uses this computer:	
Everyone	
⊚ Just <u>m</u> e	
Cancel < <u>B</u> ack	<u>N</u> ext >

Keep clicking the 'Next' button to complete the installation. Once completed, the installer will display the following window:

B PCS Clinical Audit	
Installation Complete	
PCS Clinical Audit has been successfully installed.	
Click "Close" to exit.	
Please use Windows Update to check for any critical updates to the .NET Fram	nework.
Cancel < <u>B</u> ack	Close

To finalise the installation you will need to configure CAT4 - please use this guide to set up the preferences for the clinical and billing system as well as the CAT4 settings: Setting Your Preferences(see page 48)

7 FREQUENTLY ASKED QUESTIONS CAT4 INSTALLATION

8 CAT4 Scheduler Offline Troubleshooting

PenCS CAT 4 Scheduler can go offline due to a number of reasons. This document is meant for IT support or staff with administrator access and an understanding of their IT infrastructure and will show you how to restart Scheduler.

The main causes for Scheduler not working are:

- Pen CS CAT Scheduler Service has been either **disabled** or **removed** (*uninstalled or Server decommissioned etc.*).
- Pen CS CAT Scheduler Service is being **blocked** by Antivirus software
- Local System user has **no permission** to run the service.

Steps to restart the Scheduler service

Find the computer that has Pen CS CAT Scheduler installed. In most cases this will be the server running the clinical software, but it could also be a workstation. This can be done by checking installed programs on the computer or server.

There should be at least one computer running with Pen CS CAT Scheduler in the practice to send data to the PHN or other organisation; if there is no machine with scheduler installed please book a new installation using this link: http://www.pencs.com.au/support/online-booking/

B		Programs and Features				- 🗆 🗙
🛞 🎯 🕤 🕇 🛃 🕨 Control	Panel + All Control Panel Items + Programs and	Features		~ C	Search Program	ns and Features 🔎
<u>File Edit View Tools H</u> elp					۵ 🖬 🕻	K 🗸 🖃 🔵
Control Panel Home View installed updates 😵 Turn Windows features on or	Uninstall or change a program To uninstall a program, select it from the lis	t and then click Uninstall, Change, or Repair.				
off	Organize - Uninstall/Change					8= • 🛞
Install a program from the network	Name	Publisher	Installed On	Size	Version	
	Providers for ASP.NET Help Patalk Messenger 11.7 PCS Clinic Service PCS Color Service Pen CS CAT Scheduler Pen CS CAT4 Pen CS CAT4 Pen CS CAT4 Pen CS Pty Ltd Product version: Help link:	Oracle Corporation AVM Software Inc. Pen CS Pty Ltd Pen CS Pty Ltd Pen CS Pty Ltd Pen CS Pty Ltd 3.9.80.3754 Support link: http://www.pencs.co Size: 4.93 MB	24/03/2016 11/02/2016 16/03/2018 4/05/2018 8/12/2017 31/05/2018 19/02/2018 19/02/2018	362 KB 297 MB 149 MB 4.93 MB 77.5 MB	11.1.0720 11.7.631.17760 2.2.8.5327 2.2.8.5327 3.9.80.3754 4.10.1.2 4.9.0.2	
1 item selected				4	.93 MB	Computer

Make sure CAT 4 Scheduler is running on the computer/ server under windows **Services.** You can access Services by typing 'Services' in the Windows start menu.

Please note: To change Windows services windows logged in user needs the right permissions; if the user does not have the required rights to change windows services; need to request ICT support to do this step.

Programs (4)
Services
Component Services
Reporting Services Configuration Manager
services.exe
Control Panel (6)
🔃 View local services
📑 Manage Information Cards that are used to log on to online set
📑 Windows CardSpace
Documents (31)
MSI - Communication Services.log
MSI Uninstall - Communication Services.log
MSI - Communication Services.log
Files (3)
Eula.txt
💻 winaudit (1).exe
🚇 winaudit.exe
See more results
Charles (
services × Snut down F

Check the **Status & Start-up Type** If Service Status is **Running &** Start-up is **Automatic** then restart the service

9,			Services					- 🗆 🗙
Eile Action View	v <u>H</u> elp							
* * 🖬 🖾	0 🗟 🛛 📷 🕨 🗷 🕨							
🔅 Services (Local)	Services (Local)							
	Pen CS CAT Scheduler Service	Name	Description		Status	Startup Type	Log On As	^
		Reer Networking Identity Manager	Provides identity services for the Peer Na	ame Resolution Protocol (Manual	Local Service	
	Stop the service	Pen CS CAT Scheduler Service	Pen CS CAT Scheduler Service		Running	Automatic (D	Local System	
	Nestan the service	Reformance Counter DLL Host	Enables remote users and 64-bit pro	Start	_	Manual	Local Service	
		Reformance Logs & Alerts	Performance Logs and Alerts Collec	Stop c		Manual	Local Service	
	Description: Res CS CAT Scheduler Service	RIUg and Play	Enables a computer to recognize an	Pause s	. Running	Manual	Local System	
	Pen CS CAT Scheduler Service	R PNRP Machine Name Publication Service	This service publishes a machine na	Resume 50.		Manual	Local Service	
		Portable Device Enumerator Service	Enforces group policy for removable	Restart pl		Manual (Trig	Local System	
		G postgresql-x64-9.6 - PostgreSQL Server 9.6	Provides relational database storage	AUTOL	Running	Automatic	Network Service	
		G Power	Manages power policy and power p	All Tasks •	Running	Automatic	Local System	
		R Print Spooler	This service spools print jobs and ha	Refresh ti	Running	Automatic	Local System	
		Printer Extensions and Notifications	This service opens custom printer d	Descention fi		Manual	Local System	
		Problem Reports and Solutions Control Pa	This service provides support for vie	Properties of.		Manual	Local System	
		Program Compatibility Assistant Service	This service provides support for the	Help IS.	. Running	Automatic	Local System	
		Quality Windows Audio Video Experience	Quality Windows Audio Video Experience	c (greate) is a necession.		Manual	Local Service	
		Remote Access Auto Connection Manager	Manager dial up and virtual private netwo	work (//DN) connections fr.		Manual	Local System	
		Remote Decktop Configuration	Remote Deckton Configuration remice (PDCS) is responsible for a	Rupping	Manual	Local System	
		Remote Desktop Configuration	Allows users to connect interactively to a	a remote computer. Rem.	Running	Manual	Network Service	
		Remote Desktop Services UserMode Port R	Allows the redirection of Printers/Drives	Ports for RDP connections	Running	Manual	Local System	
		Remote Procedure Call (RPC)	The RPCSS service is the Service Control	Manager for COM and D.	Running	Automatic	Network Service	
		Remote Procedure Call (RPC) Locator	In Windows 2003 and earlier versions of	Windows, the Remote Pr		Manual	Network Service	
		Remote Registry	Enables remote users to modify registry	settings on this computer.		Automatic (T	Local Service	~
	Extended Standard							

If the Service Status is either not **Running** or Start-up Type is **Disabled;** then Enable & Start the service.

O ₀			Services				×
Eile Action View	Help						
(+ +) 📰 🖾	🗟 📓 🚺 🖬 🕨 💷 🕪						
Services (Local)	Services (Local)						
	Pen CS CAT Scheduler Service	Name	Description	Status	Startup Type	Log On As	^
		Reer Networking Identity Manager	Provides identity services for the Peer Name Resolution Protocol (Manual	Local Service	
	Description:	Ren CS CAT Scheduler Service	Pen CS CAT Scheduler Service		Disabled	Local System	
	Pen CS CAT Scheduler Service	Reformance Counter DLL Host	Enables remote users and 64-bit processes to query performance	_	Manual	Local Service	
		Reformance Logs & Alerts	Performance Logs and Alerts Collects performance data from loc		Manual	Local Service	
		Rlug and Play	Enables a computer to recognize and adapt to hardware changes	Running	Manual	Local System	
		R PNRP Machine Name Publication Service	This service publishes a machine name using the Peer Name Reso		Manual	Local Service	
		Revice Enumerator Service	Enforces group policy for removable mass-storage devices. Enabl		Manual (Trig	Local System	
		postgresql-x64-9.6 - PostgreSQL Server 9.6	Provides relational database storage.	Running	Automatic	Network Service	
		Q Power	Manages power policy and power policy notification delivery.	Running	Automatic	Local System	
		Revealed Spooler	This service spools print jobs and handles interaction with the pri	Running	Automatic	Local System	
		Reprinter Extensions and Notifications	This service opens custom printer dialog boxes and handles notifi		Manual	Local System	
		Problem Reports and Solutions Control Pa	This service provides support for viewing, sending and deletion of		Manual	Local System	_
		Reprogram Compatibility Assistant Service	This service provides support for the Program Compatibility Assis	Running	Automatic	Local System	
		🐘 Quality Windows Audio Video Experience	Quality Windows Audio Video Experience (qWave) is a networkin		Manual	Local Service	
		Remote Access Auto Connection Manager	Creates a connection to a remote network whenever a program re		Manual	Local System	
		Remote Access Connection Manager	Manages dial-up and virtual private network (VPN) connections fr		Manual	Local System	
		Remote Desktop Configuration	Remote Desktop Configuration service (RDCS) is responsible for a	Running	Manual	Local System	
		Remote Desktop Services	Allows users to connect interactively to a remote computer. Rem	Running	Manual	Network Service	
		Remote Desktop Services UserMode Port R	Allows the redirection of Printers/Drives/Ports for RDP connections	Running	Manual	Local System	
		Remote Procedure Call (RPC)	The RPCSS service is the Service Control Manager for COM and D	Running	Automatic	Network Service	
		Remote Procedure Call (RPC) Locator	In Windows 2003 and earlier versions of Windows, the Remote Pr		Manual	Network Service	
		😳 Remote Registry	Enables remote users to modify registry settings on this computer		Automatic (T	Local Service	~
	Extended / Standard /						

Then validate the scheduler in CAT 4 under Edit/ Preferences/Scheduler

Clinical A	Audit E	Best Pr	actice	Communi	care	Ferret	Genie	GPO	Complete	Medic	al Direct	or 3	Medir	net I	MedTed	h32	MME	X	
practiX	Zedme	d M	ediflex	Medilink	The	Practice	Sche	duler	Data Su	bmissio	n Topb	ar							
Schee	duler Wo	orking	Folder [Directory				C:\F	Program F	iles (x86)\Pen C	omput	ter Sys	tems	PCS S	chedu			
Schee	duler De	dicate	d CAT /	Account N	ote			This colle	is the ac ections w	count c ill run un	redential der.	ls that	the S	chedu	led CA	Т			
User I	Vame							Sch	eduler.37	27]		
Passv	vord							•••]		
									Validat	e Acco	unt								
Multip	ole Loca	tions						lf th	ese extra	cts are t	eina ser	nt to v	our Pł	IN PA	T CAT	vou			
CAT	has dete	ected					Sched	luler	Config	uratio	on				x				
				Acc It is pre	count reco feren	t creden mmenc ices hav	tials ve led that e been	rified t you succe	and save perform ssfully s	ed succ a Test aved.	essfully Schedul	le to v	verify	your OK					
			-																

For the verification purpose of CAT 4 Scheduler; 20 Patients test collection can be done using Test **Scheduler** in Scheduler in Menu bar.



Pen CS CAT4 - CAT4	- 0 X
File Edit View Tools Data Submission Pro	mpts Scheduler Help
Colect View Fiter Report Popul	tion Deshoard CAT Communicare. CNProgram Files (x85)/Communicare
29/05/2018 10:42 AM 20 TEST_RMBL_ALL	Demographics Ethnicity Data Quality Data Cleansing Allergies Smoking Alcohol Measures Pathology Disease Screening Co-morbidities Medications Diabetes SIP Items (+ +
	Population Pyramid Age Profile (RACGP)
	Export Age bracket 5 🚊 Print
	Demographic Breakdown by Age Females = 0, Males = 0, Other = 0
	Female Male
	× Scheduler test successful.
	OK

If the Test Scheduler runs successfully the PEN CS CAT4 Scheduler is ready to do a full extract. Use **Scheduler** in menu bar to get access to Scheduled tasks.

More information on the set-up of Scheduler can be found here:

http://help.pencs.com.au/display/CG/Setting+up+CAT4+for+Scheduler

To upload de-identified data, a location needs to be specified in CAT4. The details on how to configure a 'send to location' can be found here:

http://help.pencs.com.au/display/CG/Configure+Send+to+PATCAT

If the Scheduler Test failed please contact Pen CS Support on 1800 762 993