

# CAT4 USER INTERFACE

CAT GUIDES

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<sup>1</sup> <https://help.pencs.com.au/display/CG/CAT4+Dashboard>

# 1 Starting CAT4

Once the CAT4 software has been installed it is available from your Programs List and as a short cut on the desktop. Click the Desktop Shortcut to start the program.



OR

- Click Start > All Programs > Pen Computer Systems > Pen CS clinical Audit Tool 4
- This will load the login screen
- Enter your Username and Password and click 'Login'
- This will load the dashboard, allowing you to choose different views and other functionality. Please refer to the quick reference guide CAT4 Dashboard for full details

The logon screen for CAT4. It features a dark blue background with the CAT4 logo (a white circle with a yellow '4' and a white '4') on the left. The text 'CAT 4' is displayed in large white letters. On the right, the PenCS logo is visible. Below the logo, there are two input fields: one for the username 'Matthias' and one for the password 'Password'. A link 'Forgot your password?' is located below the password field. At the bottom, there are two buttons: 'LOGIN' (grey) and 'CANCEL' (blue). On the right side, there is contact information: 'Need Support? FREECALL 1800 762 993 www.pencs.com.au' and 'Remote Support'. The version number 'Version: 4.0.3.0' is displayed in the bottom right corner.

Figure2: CAT4 Logon Screen

## 2 Password retrieval

To access CAT4 you will need a valid licence. This may have been supplied by an organisation such as a Medicare Local/PHN or your practice might have purchased their own licence covering all users. Log on by entering the username and password in the respective fields and click on OK. Please note that both username and password are case sensitive. If you enter an incorrect password or username this message will be displayed:

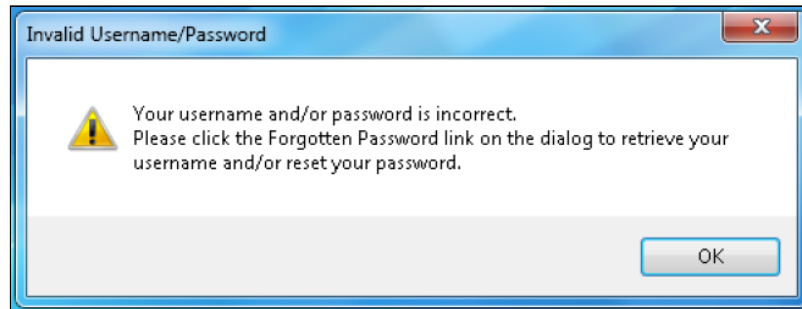


Figure 3: Invalid Username/Password

The "Forgotten Password" link on the logon screen allows you to reset your password via our web portal. Please note that we store password encrypted and are not able to provide you with your password – the only option is to reset the password to a new one even if you call our support desk.

The screen below will open in your web browser if you click the "Forgotten Password" link. Please follow the instructions to receive a new password by email. This function requires your email to be up to date – please also check your junk folder for our reset email.

## Request password reset email

Please provide either your MyPEN username **or** the email address associated with your MyPEN account. An email will be sent to your MyPEN accounts associated email address containing both your MyPEN username and a link to a password reset page.

Please note, if providing an email address, this functionality is only available for MyPEN accounts that do not share an email address with other MyPEN accounts.

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Username

**or** Email

[Request password reset email](#)

Figure 4: Password Reset Request

Once reset you can log into our portal at any time to change the password to one of your preference. To log onto the portal you need to use this link:

<https://users.pencs.com.au/admin/>

and log on with your CAT4 username and password. You will see your own account and other accounts in your organisation.

The screenshot shows a navigation menu with 'Users' selected. Below the menu is a table with the following data:

Name (Username)	Self-Reg Status	Active	Permission Level
Matthias @PENCS (Matthias) <span style="color: red; font-weight: bold;">You</span>	N/A	Yes	Basic

Figure 5: CAT4 User Portal

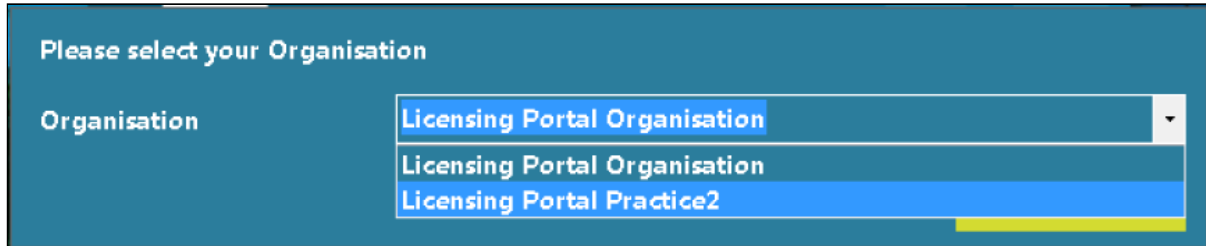
As a basic user you can only change your own password by clicking on your username and then on the password tab on the following screen. As administrator you can change the passwords of other users at your organisation.

The screenshot shows the 'Membership and Licensing' section with the 'Password' tab selected. The form contains two input fields: 'Password' and 'Confirm Password', followed by a 'Change password' button.

Figure 6: CAT4 Password Change

### 3 Users working at multiple locations

If you are registered at multiple locations you will be asked to confirm the practice/location you are logging on.



Please select your Organisation

Organisation

Licensing Portal Organisation

Licensing Portal Organisation

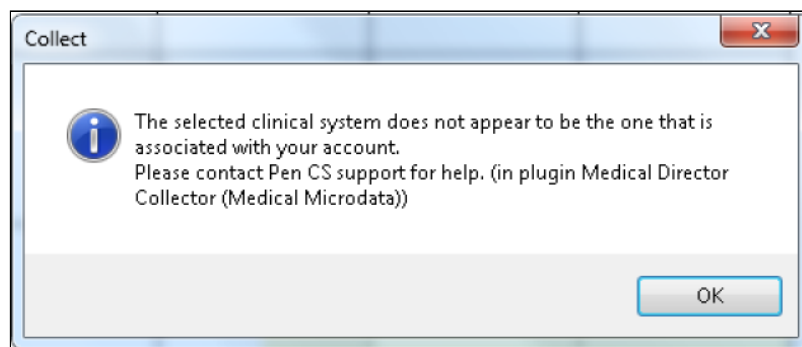
Licensing Portal Practice2

*Figure 7: Confirm Practice Location*

Select the appropriate location and click on 'OK'. This screen will not be displayed for users registered at one location only which is the majority of CAT users.

## 4 Licence lockdown

With the latest update of CAT4 we have introduced a new feature to ensure CAT4 is only used at licenced clinics by users registered to work at that clinic. This will stop anyone who is not a registered user at the clinic to view their data and to use CAT. It will increase the privacy of the patient data contained in CAT4 and will stop users from continuing to use CAT4 elsewhere after leaving a clinic. CAT4 is linked to the clinical system on the first successful data collection to stop any use outside the clinic. This means any subsequent changes to the clinical system will have to be reflected in the clinic's licence. This can only be done by PEN CS support staff. If you are planning to change your clinical system please contact PEN CS support to ensure that CAT4 will continue to work with the new system. In case of an incorrect linked clinical system you will see the error message shown below:



*Figure 8: Incorrect Clinical System Configured*



## 5 Navigating the CAT4 User Interface

### 5.1 Navigating CAT4 Menus

The CAT4 screen has been broken into four key areas, Menu Bar, Data Extracts, Filters and Reports.

The screenshot shows the CAT4 user interface with several red callout boxes highlighting key areas:

- Click to show/hide your extracts:** Points to the 'Hide Deidentified Extracts' button in the top left.
- Click 'Collect' to collect a new extract:** Points to the 'Collect' button in the top left.
- Click to show/hide the filter panel:** Points to the 'Filter' button in the top left.
- Access to different CAT modules:** Points to the 'CAT 4' button in the top left.
- Clear Filters First!:** Points to the 'Clear Filters' button in the top right.
- Recalculate after applying any changes to your filters:** Points to the 'Recalculate' button in the top right.
- Progress bar:** Points to the progress bar in the top right.

The interface is divided into four key areas:

- Menu Bar:** Located at the top, containing 'File', 'Edit', 'View', 'Tools', 'Data Submission', 'Scheduler', and 'Help'.
- Data Extracts:** A list on the left side showing various extracts with columns for date, time, and patient ID.
- Filters:** A central panel with various filter options such as 'Gender', 'Age', 'MBS Attendance', and 'Activity'.
- Reports:** A section at the bottom displaying a 'Demographic Breakdown by Age' chart, showing the number of patients for different age groups, categorized by gender (Female and Male).

## 5.2 Navigating Cleansing CAT4 Menus

The screenshot shows the 'Data Cleansing' interface. At the top, there are several tabs: 'Missing Demographics', 'Missing Clinical/Accreditation Items', 'Indicated CKD with No Diagnosis', 'Indicated Diabetes with No Diagnosis', 'Indicated Mental Health with No Diagnosis', 'Indicated COPD with No Diagnosis', and 'Indicated Osteoporosis with No C'. Below these is a 'Patient List' for 'page 1 of 9 [Count = 167]'. The list includes columns for 'Surname', 'First Name', 'DOB', 'Indication Date', 'Sex', 'Anti-diabetic Medication', 'HbA1c', 'FBG', 'Eye Exam', 'BMI', 'BP', 'Foot Exam', 'Chol', 'Trig', 'HDL', 'Malb', 'Smoking', 'eGFR', 'Assigned Provider', and 'Confirm Condition Does Not Exist'. The 'Anti-diabetic Medication' column is color-coded: red for 'Likely', yellow for 'Possible', and light yellow for 'Review'. Red callout boxes provide instructions: 'Double click on the patient name to open their record in your clinical system', 'Click on any column header to sort', 'If you have confirmed that the patient does not have the indicated condition, clicking here will remove them from future reports', 'Click on 'Save As' to save the report in Excel or CSV', and 'Click on Export to save a list of patients'.

## 5.3 Navigating Reports

A patient reidentification report produced in CAT4 and Cleansing CAT will display to your screen. You can save your report in Excel, Word or PDF formats or print a hard copy.

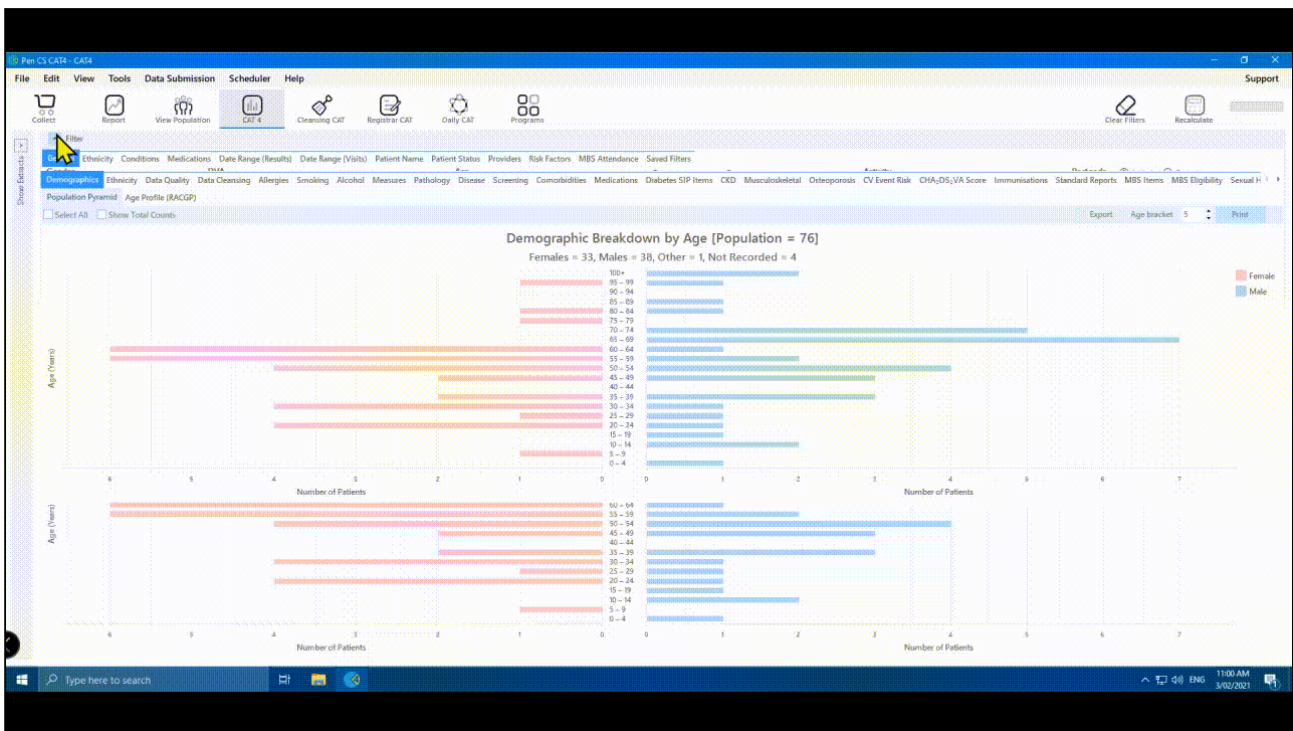
**Move between pages** | **Configure print layout** | **Export the patient list in many formats** | **Click above any column header to sort**

**Reidentify Report [Patient Count = 1776]**  
Selected: Smoking (Not Recorded)

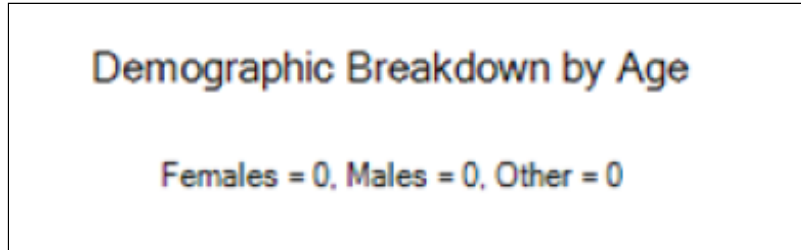
ID	Surname	First Name	Known As	Sex	D.O.B (Age)	Address	City	Postcode	Phone (H/W)	Phone (M)	Medicare	Smoking	Review Date
10080	Surname	Firstname_6	Firstname_6	F	01/11/1954 (67)	12 John St	Suburb Town	4733	H:07 50505050 W:07 50509999	1234999999	1234123412 34	Not Recorded	
7278	Surname	Firstname_10	Firstname_10	F	01/11/1994 (27)	12 John St	Suburb Town	2498	H:07 50505050 W:07 50509999	1234999999	1234123412 34	Not Recorded	
1456	Surname	Firstname_11	Firstname_11	M	01/11/2010 (11)	12 Jogger St	Suburb Town	3416	H:07 50505050 W:07 50509999	1234999999	1234123412 34	Not Recorded	
5844	Surname	Firstname_13	Firstname_13	M	01/11/2007 (14)	12 Jogger St	Suburb Town	3871	H:07 50505050 W:07 50509999	1234999999	1234123412 34	Not Recorded	
9311	Surname	Firstname_23	Firstname_23	M	01/11/2011 (10)	12 Jogger St	Suburb Town	2015	H:07 50505050 W:07 50509999	1234999999	1234123412 34	Not Recorded	
8556	Surname	Firstname_33	Firstname_33	F	01/11/1993 (28)	12 John St	Suburb Town	3062	H:07 50505050 W:07 50509999	1234999999	1234123412 34	Not Recorded	

**Refine the list if required** | **Remove patients who have opted out of recall** | **Create SMS or Voice Recall messages** | **Create Prompts for Topbar based on the list displayed**

It is recommended to hide the data extracts (Snapshots) and data filter (Filters) areas of the screen in order to make best use of your screen space to view the data results (Reports). You can toggle between the View/Hide modes at any time by clicking on the arrow icon in the respective bar.



**Note:** On first start-up, the report tabs will be empty as you have not yet collected data from your clinical desktop system or loaded an existing extract file.



## 6 Switching Views

From any view in CAT4 you can either 1) go back to the dashboard by using the dashboard icon and select a different view there, or 2) use one of the icons displayed in the menu bar to switch directly between the different views. The view you are currently using is shown with a black frame around the icon, in the example below this is 'Daily CAT'



*Figure 13: CAT4 Menu Icons*