

CAT PLUS GUIDES

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Table of Contents

1	CAT Plus Frequently asked Questions	7
1.1	FAQ CAT PLUS INSTALLATIONS	7
1.1.1	General	8
1.1.1.1	Why are GP practices using the PHN's Data Quality Improvement Plan and installing CAT Plus?	8
1.1.1.2	What is the Quality Improvement Process the PHN is using?	9
1.1.1.3	How is the Quality Improvement program applied at the practice level?	9
1.1.2	Installation	10
1.1.2.1	What is the typical installation process for the CAT Plus products?	10
1.1.2.2	Who will contact our practice to install the tools?	10
1.1.2.3	Does the practice have to pay for installation?	11
1.1.2.4	What does PEN CS install for the practice?	11
1.1.2.5	What is "administrative access to the server mean"?	11
1.1.2.6	Why does CAT4 need to be installed on the server?	11
1.1.2.7	Can CAT4 be installed on a desktop computer instead of the Server?	11
1.1.2.8	Is there a special password for Best Practice that I need?	11
1.1.2.9	Do I need to have my IT support person present during the installation?	11
1.1.2.10	Why is my IT required to be involved during installation?	11
1.1.2.11	Why does a practice need to provide IT contact details to PEN CS for PEN CS installation?	12
1.1.2.12	What if a practice gets charged by the IT company? Is there a way to avoid the charge?	12
1.1.2.13	How can other users in the practice see the extracts?	12
1.1.2.14	If I need to cancel or reschedule the appointment what should I do?	12
1.1.2.15	I had an appointment booked but no one from PEN CS called, what happened?	12
1.1.3	Products	12
1.1.3.1	What is the Clinical Audit Tool / CAT4?	12
1.1.3.2	What is Topbar?	13
1.1.3.3	Do CAT4 and Topbar rely on each other to work at a practice? Is one or the other optional?	13
1.1.3.4	What is PAT CAT?	13
1.1.3.5	How does a practice benefit from submitting data to the PHN/PATCAT?	13
1.1.4	Scheduler	14
1.1.4.1	Our practice already has Scheduler installed, why does it need to be updated?	14
1.1.4.2	What is Scheduler?	14
1.1.4.3	What is the benefit of Scheduler?	14
1.1.4.4	When will Scheduler Run?	14

1.1.4.5	Why is it preferable to run scheduler out of hours?	14
1.1.4.6	What are the impacts if it has to be done and set up during business hours?	14
1.1.4.7	Why are the products free to our practice?	15
1.1.4.8	Can our practice submit data manually?	15
1.1.5	Data Security	15
1.1.5.1	Where is the PAT CAT data stored?	15
1.1.5.2	Does any identified information leave the general practice?	15
1.1.5.3	Can I exclude patients that do not wish to have their data shared with the PHN?	15
1.1.5.4	Will other practices see my data?.....	15
1.1.5.5	What is de-identified data?.....	16
1.1.5.6	Do the CAT Products write back to the Clinical System?	16
1.1.5.7	Does CAT Plus always connect to the Clinical System every time it runs?.....	16
1.1.6	Ethics	16
1.1.6.1	Does the RACGP Require ethics approval before using the CAT plus products?	16
1.1.7	Checklist for Practices	16
1.1.8	Important Phone Numbers.....	17
1.2	Pen CS Software Fact Sheet for IT Providers and Practices.....	17
2	CAT PLUS PROMPTS.....	20
2.1	CAT4	20
2.1.1	Requirements	20
2.1.2	Configuration	20
2.2	PAT CAT	28
2.2.1	Requirements.....	28
2.3	Topbar	34
2.3.1	Background	34
2.3.2	Displaying Prompts.....	35
3	CAT PLUS SCHEDULER V3 INSTALLATION GUIDE.....	39
3.1	Pre-requisites for installing PCS Scheduler	39
3.2	Updating Scheduler V2 to V3	39
3.3	Installing and configuring PCS Scheduler v3.0 and above including CAT40	40
4	Licensing Portal.....	61
4.1	Intended Audience	61
4.2	Licensing Structure	61

4.3	Users at multiple organisations	61
4.4	Licence lockdown	61
4.5	Quick Steps for PHN Users.....	62
4.5.1	Creating a new user for your PHN	62
4.5.2	Creating a new client organisation	62
4.5.3	Creating a new user for a client organisation.....	62
4.5.4	Changing user preferences or password	62
4.5.5	Removing a user.....	63
4.5.6	Creating a list of all current users.....	63
4.6	Using the Portal.....	63
4.6.1	Organisation Level	65
4.6.1.1	Users	65
4.6.1.2	Client Organisations	66
4.6.1.3	Membership and Licensing for Organisations.....	68
4.6.1.4	Credit	68
4.6.1.5	Login Usage Reports	68
4.6.2	User Level	71
4.6.2.1	Membership and Licensing for Users	72
4.6.2.2	Organisations	72
4.6.2.3	Password	73
4.7	Managing Users	73
4.7.1	Adding New Users	73
4.7.2	Changing User Preferences and Access Level	74
4.7.3	Removing Users	75
4.7.4	Changing Passwords.....	75
4.8	Self Registration	76
4.9	Search Functions.....	78
4.10	Scheduler Management Console	79
5	PAT CAT Responsibilities and Requirements.....	91
5.1	Responsibilities	91
5.2	Requirements.....	91
6	QUICK STEP GUIDES	94
6.1	CAT Plus Installation Step by Step Guide	94

6.2	CAT Plus Practice Installation Checkup	95
6.3	CAT Plus for New Users	97
6.4	Network Setup for CAT Plus	98
6.4.1	URL Permissions	99
6.4.2	For data submission to PAT CAT	99
6.4.3	EXCLUSIONS	99
6.4.3.1	Folder paths that need to be under the exclusions list of any Anti-virus software	99
6.4.4	PERMISSIONS	100
6.4.4.1	Add FULL CONTROL permission to LOCAL COMPUTER USERS	100
6.4.5	EXCEPTIONS	100
6.4.6	EXCLUSIONS	102
7	CAT Plus Health Care Homes.....	103
8	Consent Management Portal.....	105
8.1	Consent Management Portal for PHNs/Other organisations	105
8.2	Consent Management Portal Guide for Practices	111

The user guides shown here are for functionality that links the three components Topbar, CAT4 and PAT CAT. New guides will be added as more relevant functionality is released.

- [Licensing Portal](#)(see page 61)
 - [Quick Steps for PHN Users](#)(see page 62)
 - [Using the Portal](#)(see page 63)
 - [User Level](#)(see page 71)
 - [Membership and Licensing for Users](#)(see page 72)
 - [Organisations](#)(see page 72)
 - [Password](#)(see page 73)
 - [Organisation Level](#)(see page 65)
 - [Users](#)(see page 65)
 - [Client Organisations](#)(see page 66)
 - [Membership and Licensing for Organisations](#)(see page 68)
 - [Credit](#)(see page 68)
 - [Login Usage Reports](#)(see page 68)
 - [Managing Users](#)(see page 73)
 - [Adding New Users](#)(see page 73)
 - [Changing User Preferences and Access Level](#)(see page 74)
 - [Removing Users](#)(see page 75)
 - [Changing Passwords](#)(see page 75)
 - [Self Registration](#)(see page 76)
 - [Search Functions](#)(see page 78)
 - [Scheduler Management Console](#)(see page 79)
- [QUICK STEP GUIDES](#)(see page 94)
 - [CAT Plus Installation Step by Step Guide](#)(see page 94)
 - [CAT Plus Practice Installation Checkup](#)(see page 95)
 - [CAT Plus for New Users](#)(see page 97)
 - [Network Setup for CAT Plus](#)(see page 98)
- [CAT PLUS PROMPTS](#)(see page 20)
 - [Topbar](#)(see page 34)
 - [PAT CAT](#)(see page 28)
 - [CAT4](#)(see page 20)
- [CAT PLUS SCHEDULER V3 INSTALLATION GUIDE](#)(see page 39)
 - [Pre-requisites for installing PCS Scheduler](#)(see page 39)
 - [Updating Scheduler V2 to V3](#)(see page 39)
 - [Installing and configuring PCS Scheduler v3.0 and above including CAT40](#)(see page 40)
- [PAT CAT Responsibilities and Requirements](#)(see page 91)
- [CAT Plus Frequently asked Questions](#)(see page 7)
 - [FAQ CAT PLUS INSTALLATIONS](#)(see page 7)
 - [Pen CS Software Fact Sheet for IT Providers and Practices](#)(see page 17)
- [CAT Plus Health Care Homes](#)(see page 103)
- [Consent Management Portal](#)(see page 105)
 - [Consent Management Portal Guide for Practices](#)(see page 111)
 - [Consent Management Portal for PHNs/Other organisations](#)(see page 105)

1 CAT Plus Frequently asked Questions

- [FAQ CAT PLUS INSTALLATIONS](#)(see page 7)
- [Pen CS Software Fact Sheet for IT Providers and Practices](#)(see page 17)

1.1 FAQ CAT PLUS INSTALLATIONS



General

1. [Why are GP practices using the PHN's Data Quality Improvement Plan and installing CAT Plus?](#) (see page 8)
2. [What is the Quality Improvement Process the PHN is using?](#) (see page 9)
3. [How is the Quality Improvement program applied at the practice level?](#) (see page 9)
4. [What is the typical installation process for the CAT Plus products?](#) (see page 10)
5. [Who will contact our practice to install the tools?](#) (see page 10)
6. [Does the practice have to pay for installation?](#) (see page 11)
7. [What does PEN CS install for the practice?](#)(see page 11)
8. [What is "administrative access to the server mean"?](#)(see page 11)

Installation

1. [Why does the CAT Tool need to be installed on the server?](#) (see page 11)
2. [Can CAT4 be installed on a desktop computer instead of the Server?](#) (see page 11)
3. [Is there a special password for Best Practice that I need?](#) (see page 11)
4. [Do I need to have my IT support person present during the installation?](#) (see page 11)
5. [Why is my IT required to be involved during installation?](#) (see page 11)
6. [Why does a practice need to provide IT contact details to PEN CS for PEN CS installation?](#) (see page 12)
7. [What if a practice gets charged by the IT company? Is there a way to avoid the charge?](#) (see page 12)
8. [How can other users in the practice see the extracts?](#) (see page 12)
9. [If I need to cancel or reschedule the appointment what should I do?](#)(see page 12)
10. [I had an appointment booked but no one from PEN CS called, what happened?](#)(see page 12)

Products

1. [What exactly is the Clinical Audit Tool / CAT4?](#) (see page 12)
2. [What is Topbar?](#) (see page 13)
3. [Do CAT4 and Topbar rely on each other to work at a practice? Is one or the other optional?](#) (see page 13)
4. [What is PAT CAT?](#)(see page 13)
5. [How does a practice benefit from submitting data to the PHN/PATCAT?](#)(see page 13)

Scheduler

1. [Our practice already has Scheduler installed, why does it need to be updated?](#) (see page 14)
2. [What is Scheduler?](#) (see page 14)
3. [What is the benefit of Scheduler?](#) (see page 14)
4. [When will Scheduler Run?](#) (see page 14)
5. [Why is it preferable to run scheduler out of hours?](#) (see page 14)
6. [What are the impacts if it has to be done and set up during business hours?](#) (see page 14)
7. [Why are the products free to our practice?](#)(see page 15)
8. [Can our practice submit data manually?](#)(see page 15)

Data Security

1. Where is the PAT CAT data stored? (see page 15)
2. Does any identified information leave the general practice? (see page 15)
3. Can I exclude patients that do not wish to have their data shared with the PHN? (see page 15)
4. Will other practices see my data? (see page 15)
5. What is de-identified data?(see page 16)
6. Do the CAT Products write back to the Clinical System? (see page 16)
7. Does CAT Plus always connect to the Clinical System every time it runs? (see page 16)

Ethics

1. Does the RACGP Require ethics approval before using the CAT plus products? (see page 16)

Checklist for Practices(see page 16)

Important Phone Numbers (see page 17)

1.1.1 General**1.1.1.1 Why are GP practices using the PHN's Data Quality Improvement Plan and installing CAT Plus?**

RACGP Guidelines

General Practices are centre of healthcare in Australia and the RACGP Standards for General Practices (4th edition) state;

The guideline Criterion 3.1.1 Quality Improvement Activities








1. Our Practice team can describe aspects of our practice that we have improved in the past three years.
2. Our practice uses relevant patient and practice data for quality improvement (eg. Patient access, chronic disease management, preventive health).

Key Points

- Practices need to engage in quality improvement activities to improve quality and safety for patients in areas such as practice structures, systems and clinical care
- Decisions on changes should be based on practice data
- Achieving improvements requires the collaborative effort of the practice team and all members of the team should feel empowered to contribute

<http://www.racgp.org.au/your-practice/standards/standards4thedition/safety,-quality-improvement-and-education/3-1/quality-improvement-activities/>

The CAT4 tool can be an integral part of achieving these goals.

Data Quality Dashboard		Report Date: 16/08/2016 5:55 PM	
		Practice Name: PENCs-NB-05	
Data is taken from the Data Completeness Report and Duplicate Patients Report.			
Allergies and adverse reactions		75.00 %	View Guidelines
Medicines		31.25 %	View Guidelines
Medical History		100.00 %	View Guidelines
Health Risk Factors		82.00 %	View Guidelines
Immunisations		80.00 %	View Guidelines
Relevant Family History		40.00 %	View Guidelines
Relevant Social History		40.00 %	View Guidelines

- It allows the practice to use the graphs that are produced to show how the practice has improved in the past three years. To do this the tool can collect a data extract each month.
- The practice can review their own data, and the PHN can assist with providing benchmarking with other practices in the PHN catchment to see how the practices data compares.
- Decisions about what quality improvement programs can be decided on the basis of what areas the practice is not complying with the RACGP guidelines.

1.1.1.2 What is the Quality Improvement Process the PHN is using?

Generally PHNs will have practices install the CAT Plus products and run the scheduler each month, the data is identified and sent to the PHN where the data is aggregated on the Patient Aggregation Tool server known as PAT CAT. The data is then analysed and the PHN will provide feedback to practices. The PHN can look for trends and also unmet needs to help improve services in their catchment. This process is repeated monthly and helps form an accurate picture of the health needs of your patient, the practice, and the area.

1.1.1.3 How is the Quality Improvement program applied at the practice level?

The PHN may choose to apply a public health methodology to building sustainable systems and process that improve patient health outcomes. The Plan, Do, Study Act (PDSA) cycle is one example of how CAT Plus can be the backbone for practice assistance. It can be deployed through a Quality Improvement Management Framework

(QIMF), and as such a PHN can target specific projects and implement them.



1.1.2

Installation

1.1.2.1 What is the typical installation process for the CAT Plus products?

Practices typically install the Clinical Audit Tool and scheduler and work closely with the PHN to do an initial survey of the data. Some initial goals may be to look and see if there are duplicate patients in the system, and start to set a plan for data quality improvement. Typically, the practice manager will review the data and look also at the business opportunities and how the practice could use the information to improve patient outcomes and meet goals to achieve practice incentives. With this information the practice manager begins to gain buy-in from other staff in the practice and begin using the Topbar to assist with updating the information in day to day operation. Most practices develop a relationship with their PHN and support staff and rely on their experience working with other practices on what steps to take to improve their practice data and processes. Many practices also use the tool as part of meeting the requirements for practice accreditation.

1.1.2.2 Who will contact our practice to install the tools?

On the day a verified/allocated support engineer from Pen CS Pty Ltd will contact you, or the person you nominated on the booking form to install the software. Pen CS is the company that develop the software Clinical Audit Tool, Top Bar, Scheduler PAT CAT. We are an Australian owned and operated company with offices in Sydney and Melbourne. You can find out more about our organisation here. <http://www.pencs.com.au/>

1.1.2.3 Does the practice have to pay for installation?

No. Our technician can install the software for free. We recommend informing your IT person and letting them know that you intend to have the software installed. Some practices choose to have their IT person involved with having the products installed and this is optional.

1.1.2.4 What does PEN CS install for the practice?

Pen CS will install the clinical audit tool (CAT4) software, and the scheduler that allows the software on a monthly basis to collect the snapshot or extract of the clinical data. <http://www.pencs.com.au/products/>

1.1.2.5 What is "administrative access to the server mean"?

To install the software our support team will need to run an .exe file as in any standard software installation. Some computers require a password to install software

1.1.2.6 Why does CAT4 need to be installed on the server?

The CAT tool is installed on the practice server because the tool can be used on multiple computers within the practice. Having the extract saved on the server saves allows the copy to be shared with each desktop computer without needing to create a duplicate copy. The tool also needs full administrative permission to save the extracts to a central location. The server also is normally backed up so this means that the information extracted is a part of the backup. Servers are also normally left on 24/7 meaning that the tool can be run out of hours so as not to disrupt the practice during the day, and the server is usually the most powerful computer in the practice.

1.1.2.7 Can CAT4 be installed on a desktop computer instead of the Server?

Yes. The tool can be installed on a desktop or a server. Ideally if the information is shared it should be on the server but some practices may choose to have it on an individual desktop computer. Please contact your PHN or PENCs to discuss your individual requirements.

1.1.2.8 Is there a special password for Best Practice that I need?

Yes, Best Practice users may be required to provide the browser password. The browser password may have been changed since the software was originally installed. Our staff can install the product but to get the information from the clinical system the password may be required. If this happens a second support call may be needed to complete the installation of the software.

1.1.2.9 Do I need to have my IT support person present during the installation?

No. Many practices prefer to have PENCs install the software for them as we have done many thousands of times.

1.1.2.10 Why is my IT required to be involved during installation?

Most practices do not need to have their IT support involved in the installation process, however if the system requires a password. Issues may be easily resolved with a phone call to your IT support.

1.1.2.11 Why does a practice need to provide IT contact details to PEN CS for PEN CS installation?

The practice does not need to supply the IT contact unless they wish to do so. The practice may provide any point of contact for the installation. PENCS have found however that in the event that the installation cannot be easily completed it may be required to have a second call. Other practices prefer to simply have their IT support providers involved from the beginning. If you are unsure about this process do not hesitate to contact your PHN or PENCS support to discuss this issue.

1.1.2.12 What if a practice gets charged by the IT company? Is there a way to avoid the charge?

The practice should contact their IT company ahead of the planned installation and discuss any potential charges. PENCS have installed the software on many thousands of systems and are highly experienced at this process. Each practice's computer system is uniquely configured and secured and this may require information from the person or company that is responsible for supporting the system. Practices may avoid any charges by having PENCS complete the installation without consulting your IT provider. However, if a password or configuration is required this may result in a second call to follow up. Practices may wish to discuss with their IT provider about doing the software installation when they are performing other

1.1.2.13 How can other users in the practice see the extracts?

The tool can be set up so that there is a central extract on the server that is shared with all of the other users in the practice.

1.1.2.14 If I need to cancel or reschedule the appointment what should I do?

Contact PENCS on 1800 762 993 or email support@pencs.com.au, alternatively contact your PHN and we can reschedule your appointment.

1.1.2.15 I had an appointment booked but no one from PEN CS called, what happened?

You may have had your phone switched to go to voicemail, or the contact was not available. Please contact PENCS on 1800 762 993 to reschedule the appointment.

1.1.3 **Products**

1.1.3.1 What is the Clinical Audit Tool / CAT4?

CAT4 is a practice management and reporting software tool that works alongside the GP Clinical Information System. It extracts the patient data from the CIS standardises it to a set of reporting categories and displays it in a statistical and graphical format that is easy to understand and action. The data can be de-identified to allow the practice to participate in quality programs that are run by various organisations. Practice staff can easily identify and target populations for review and management in areas such as chronic disease management, poor patient health outcomes, data quality improvements, eHealth program, and preventable hospital admissions.

<http://www.pencs.com.au/products/cat4/>

1.1.3.2 What is Topbar?

Topbar is a real-time decision support tool that works in conjunction with the GP Clinical Information System. When installed on the computer and helps receptionists manage the patients in the waiting room and shares information with the GP, the cleansing app identifies missing information in the patients' medical records, provides a summary of the patients health and prompts the GP about MBS prompts.

<http://www.pencs.com.au/products/topbar/>

The RACGP Guidelines state;

"Achieving improvements requires the collaborative effort of the practice team and all members of the team should feel empowered to contribute"

Topbar allows practices to collaborate on improving outcomes for patients, reception staff can focus on improving the recording of patient demographics such as address, phone number, and billing details. GP's can focus on MBS items, care plans, and team care arrangements, while practice nurses can focus on ensuring vaccinations are complete and up to date.

1.1.3.3 Do CAT4 and Topbar rely on each other to work at a practice? Is one or the other optional?

CAT4 is an audit and extraction tool, Topbar is a decision support tool. CAT4 works with the patient population in your clinical system, Topbar provides relevant notifications about the patients at your clinic. The two products can work completely independent of each other, but there are some important and very useful links. In particular the CAT Plus Prompts (more information here: [CAT PLUS PROMPTS](#)(see page 20)) where patients identified through a CAT4 search can be flagged for a notification to be shown if they visit the clinic. CAT4 and Topbar compliment each other but don't rely on each other. Improvements to data quality made by using Topbar can be easily measured in CAT4.

1.1.3.4 What is PAT CAT?

CAT Plus is a population health planning and reporting platform for PHNs who manage a data quality initiative. The tool has the unique capacity to compile statistics, reports, indicators, timelines. This information is used to assist each PHN in understanding and interpreting their catchment epidemiology. The next step is for the information gathered to be analysed, and interpreted so that the PHN can accurately plan the type of services and interventions that are required within their catchment to meet their KPI's. For this to be possible the CAT4 needs to be installed at the practice, the scheduler to deidentify and send the information, and PAT CAT to receive the information. <http://www.pencs.com.au/products/pat-cat/>

1.1.3.5 How does a practice benefit from submitting data to the PHN/PATCAT?

Practices benefit from working with the PHN by submitting the data on a monthly basis and allowing the PHN to understand the health needs of the practice and the PHN's catchment. If there are unmet needs in your practices area the PHN can use the information in an aggregated form to develop strategies to help meet this need, and develop a business case for the unmet needs in the area. The PHN is also able to notice trends that are occurring in your area. With this information practices and PHN's can work collaboratively and discuss how they can best assist the patients in their catchment.

1.1.4

Scheduler

1.1.4.1 Our practice already has Scheduler installed, why does it need to be updated?

PENCS released a version of scheduler V2 and it relied on a windows username and password to be created. If the password was changed this meant that the scheduler did not run and the impact was that their monthly extract not being collected on the day they had set up. PENCS have developed a new version of the software V3 that runs in a different way. This software can also receive updates without the need for PENCS to remotely log in. In consultation with the PHNs we have developed the new version of the software and strongly encourage all practices to book an appointment to update their V2 Scheduler to the new V3.

1.1.4.2 What is Scheduler?

Scheduler is a piece of software when installed on the server that runs on a regular basis usually monthly and saves the practice staff from having to remember to run the software to have the de-identified data extracted in a regular interval. The monthly extracts can form an important part of the clinical and business information for the practice. Scheduler can also send a deidentified extract to the PHN if agreed to by the practice.

1.1.4.3 What is the benefit of Scheduler?

This software allows the practice to compare the changes in the data on a monthly basis. The practice can use the data and quality improvements that can be easily described using the graphs. The RACGP requires in the Quality Improvement activities that "Our Practice can describe aspects of our practice that we have improved in the past three years" <http://www.racgp.org.au/your-practice/standards/standards4thedition/safety,-quality-improvement-and-education/3-1/quality-improvement-activities/>

1.1.4.4 When will Scheduler Run?

By far and large, Scheduler runs on a monthly basis, or on any other nominated regular periodical schedule like quarterly, most practices and PHNs choose to run the scheduler on the 1st of every month and out of business hours.

1.1.4.5 Why is it preferable to run scheduler out of hours?

It is preferable to run the scheduler out of hours particularly in practices with large patient numbers as it may take a while to run. Running the scheduler out of hours also means that the practice sets and forgets and that a monthly extract is completed.

1.1.4.6 What are the impacts if it has to be done and set up during business hours?

The installation process typically takes between 30 minutes and one hour. Once installed the scheduler runs automatically if it is run during business hours it may impact users with older computers and slow down the system for that reason it is recommended that practices install scheduler and have the work completed out of hours.

1.1.4.7 Why are the products free to our practice?

Your local PHN has paid the license fee for the products, and provides them to your practice on a contractual basis. The normal retail cost of a licence for a practice is \$1650.

1.1.4.8 Can our practice submit data manually?

Yes, practices can run the software each month and manually prepare an extract. The extract can be sent to the PHN, or provided to the PHN on a USB drive for upload. Practices should discuss this arrangement with their PHN and if it meets the contractually agreed terms.

1.1.5 ***Data Security***

1.1.5.1 Where is the PAT CAT data stored?

Pen CS do not store the data, the data is stored on the PHN's servers. The de-identified data is sent directly from the practice to the PHN server in a zipped file send over securely and encrypted (HTTPS).

1.1.5.2 Does any identified information leave the general practice?

CAT4 de-identifies the information within the practice before submitting the de-identified extract to PAT CAT. Practices are encouraged to follow the RACGP guidelines on privacy:

"In general, a practice's quality improvement or clinical audit activities for the purpose of seeking to improve the delivery of a particular treatment or service would not be considered a directly related secondary purpose for information use or disclosure. In other words, it is likely the practice would need to seek specific consent for this use of patients' health information for clinical audit activities.

To ensure patients understand and have reasonable expectations of quality improvement activities, practices are encouraged to include information about quality improvement activities and clinical audits in the practice policy on managing health information. Ideally, express consent for these activities will be obtained upon patient registration." <http://www.racgp.org.au/your-practice/standards/standards4thedition/practice-management/4-2/confidentiality-and-privacy-of-health-information/>

1.1.5.3 Can I exclude patients that do not wish to have their data shared with the PHN?

Yes. Individual patients can have their data withheld from being submitted. Instructions can be found on the PENCs website. <http://help.pencs.com.au/display/CG/Patient+Consent+Withdrawn>

1.1.5.4 Will other practices see my data?

No identifiable information ever leaves the practice. The PHN may do benchmarking comparisons as part of the quality improvement program you can discuss with the PHN how they use the data. Other practices can NOT see your data, only the total for the PHN if at all.

1.1.5.5 What is de-identified data?

De-identified data means that the information that would identify the patient is removed. Only the **age in years, gender and ethnicity** remain in the data after de-identification.

1.1.5.6 Do the CAT Products write back to the Clinical System?

No. No CAT Plus products write back to the practices clinical system, we have **read only** access to your clinical data.

1.1.5.7 Does CAT Plus always connect to the Clinical System every time it runs?

No. The CAT Plus runs independently from the clinical system and uses the extracts when you are running queries, the only time a connection is made is when a new snapshot is created, during the data collection.

1.1.6

Ethics

1.1.6.1 Does the RACGP Require ethics approval before using the CAT plus products?

For a quality improvement activity to be undertaken within a general practice, where the primary purpose is to monitor, evaluate or improve the quality of healthcare delivered by the practice, ethics approval is not required. Clinical audits using a tool such as the Clinical Audit Tool (CAT) (see Criterion 3.1.1 Quality improvement activities) or 'plan, do, study, act' cycles undertaken within a general practice as part of a quality improvement activity do not require ethics approval. For example, a practice wishing to determine how many of its pregnant patients are given advice on smoking cessation, or how many patients with heart failure are prescribed ACE inhibitors and beta blockers, may complete an audit on their practice data.

In general, a practice's quality improvement or clinical audit activities for the purpose of seeking to improve the delivery of a particular treatment or service would not be considered a directly related secondary purpose for information use or disclosure. In other words, it is likely the practice would need to seek specific consent for this use of patients' health information for clinical audit activities.

To ensure patients understand and have reasonable expectations of quality improvement activities, practices are encouraged to include information about quality improvement activities and clinical audits in the practice policy on managing health information. Ideally, express consent for these activities will be obtained upon patient registration.

Source:<http://www.racgp.org.au/your-practice/standards/standards4thedition/practice-management/4-2/confidentiality-and-privacy-of-health-information/>

1.1.7 Checklist for Practices

- **Our practice has Best Practice Software, Communicare, Genie, Medical Director, Medinet, Medtech32, MMeX, PractiX or Zedmed.**
- **I know what billing system we have installed.**
- **I am able to install software on the main computer, or server.**
- **If needed I know the password to install software on the server.**
- **I have the contact details of our IT person and if needed I can contact them to obtain passwords.**
- **If our IT contact is unavailable I understand that another call may be needed to**

- **If using Best Practice, I am aware that the database browser password may be required.**

1.1.8

Important Phone Numbers

Pen CS Support 1800 762 993 support@pencs.com.au¹ help.pencs.com.au

Best Practice Support 1300 40 1111 www.bpsoftware.net support@bpsoftware.net

Communicare 08 6212 6900 communicare@healthconnex.com.au

Genie Solutions 07 3870 4085 support@geniesolutions.com.au

Zedmed 1300 933 000

Practix www.isofthealt.com

Medical Director 1300 788 802 www.medicaldirector.com

Medinet 1300 723 938

MMEx 08 6250 9170 info@isahealthcare.com

Medtech32 1800 148 165 support@medtechglobal.com²

1.2 Pen CS Software Fact Sheet for IT Providers and Practices

Pen CS software running in the Practice and what it does

If your practice is using CAT Plus, the Pen CS suite of software for primary care, then you may have some questions about the components of the software suite. This document should clarify the function and requirements of the individual applications, in particular in the context of security and patient data confidentiality, but also explaining the resource requirements on your server/workstations.

Software Component Table

[Topbar](#)

Decision support tool, provides information to the clinic staff about patients in the waiting or consult room. Works with MD, BP and Zedmed.

Topbar has two components, one running on the server (which communicates with Pen CS deployment services) and the other running on multiple practice workstation clients.

Component Type	Install location (default)	Resource requirements	Outside connections

¹ <mailto:support@pencs.com.au>

² <mailto:support@medtechglobal.com>

<p>Server component with local SQL database installation <i>Services*:</i> PCS.ClinicService.exe, PCS.ClinicMonitoringService.exe</p> <p>* Topbar services are required to run under the Local System Account as this is the account the Clinical Information systems (MD/BP/Zedmed) run under.</p>	<p>The Topbar server component is normally installed with the clinical system. It creates its own SQL Server DB instance (PCSDB). This stores data related to the Topbar Apps. It does not store any patient demographic or clinical data.</p>	<p>On the server: Recommended 16GB RAM; and per user at least 200MB free RAM.</p>	<p>The Topbar server component checks for software updates nightly with the Pen CS deployment services, and any app updates hourly.</p>
<p>Workstation client component that communicates with server and database <i>Processes:</i> PCSEdgeDesktopApp.exe</p>	<p>The workstation module is installed in the user's profile and might have to be installed multiple times if users are sharing computers. (Note: It should be installed in the Local profile not the Roaming profile).</p>	<p>On the workstation: 8GB RAM</p>	<p>Topbar client component checks for a valid user licence on logon. It receives updates via the server. Individual Apps may have outside connections and will implement their own security and usage agreements.</p>
<p>CAT4 Clinical Audit tool, data extractor, used by clinic staff for reporting and to de-identify and upload patient data to PHN or similar organisation.</p>			
<p>Component Type</p>	<p>Install location (default)</p>	<p>Resource requirements</p>	<p>Outside connections</p>
<p>Desktop application <i>Processes:</i> ClinicalAudit4.exe</p>	<p>Clinical server (with scheduler) and at least one workstation for clinic staff. On workstation CAT4 installs as click-once application in the user's folder, might need multiple installations if users share the computer</p>	<p>As much RAM as possible on workstations when in use for reporting, 4GB+ depending on size of clinic database. Not much on server for the extraction. Extract folder required write permissions for windows users to perform manual collection</p>	<p>Checks for updates on start-up, checks for licence on start-up, can send de-identified data to pre-configured organisations either manually or triggered by scheduler.</p>

<u>Scheduler</u> Triggers CAT4 scheduled extractions and uploads			
Component Type	Install location (default)	Resource requirements	Outside connections
Windows service Services+: PCSSchedulerService.exe	Clinical Server, running as a service	~20KB of RAM	Checks for updates every night. Requires Local System Account to have access to the internet and extract folder write permissions.

+ Scheduler services by default run under the Local System Account. This is to avoid issues that arise when running under a Windows Account with a password that is regularly changed. When the password is changed, the services will no longer run until the Practice IT has updated the Windows Account details for the service. The Practice IT can elect to change the service to run under a Windows Account if required.

More information can be found in the Pen CS installation guides.

Topbar:

<http://help.pencs.com.au/display/TTG/FULL+INSTALLATION+GUIDE+TOPBAR>

CAT4:

<http://help.pencs.com.au/display/CG/INSTALLATION>

Scheduler:

<http://help.pencs.com.au/display/CG/Scheduler+Requirements>

2 CAT PLUS PROMPTS

Pen CS has created the CAT Plus suite of software for primary health care which consists of Topbar, CAT4 and PAT CAT. These tools are already working together and CAT Prompts is the next level of integration. CAT Prompts provides the team in general practice with an easy way of communicating across the CAT Plus suite. CAT4 and PAT CAT can identify patients of interest through the large range of reports and filters, and the prompt based on the criteria used in CAT4/PAT CAT can be send to Topbar to notify the clinicians if their patient matches the chosen conditions. This can be used to improve data quality, identify patients at risk and highlight business opportunities for the practice.

The main advantage is the ease of communicating findings on a practice population level to the consult room where the individual patient is present. Rather than having to rely on printed lists or verbal communication, Topbar together with CAT4 will be able to improve team work and improve quality of care through communication.

CAT Prompts are not dependent on the patients in CAT4 OR PAT CAT as only the filters and selections used are applied when a patient is opened in the clinical system. This means if you create a new prompt today, even patients that are added to your clinical system in the future will be identified if they match the criteria.

For information on how to use the prompts in each of the individual parts of the CAT Plus suite click on the links below.

- [CAT4](#)(see page 20)
- [PAT CAT](#)(see page 28)
- [Topbar](#)(see page 34)

2.1 CAT4

2.1.1 Requirements

To use CAT Prompts you have to have the latest version of Topbar and CAT4 installed. Please contact your PHN to enquire about how to get access to the CAT Plus suite.

2.1.2 Configuration

CAT4 needs to be linked to Topbar. This should have happened during the installation, but if you are unsure if it is linked, follow the steps in the [CAT4 Configuration guide](#).³

There is no further configuration required once the link is established.



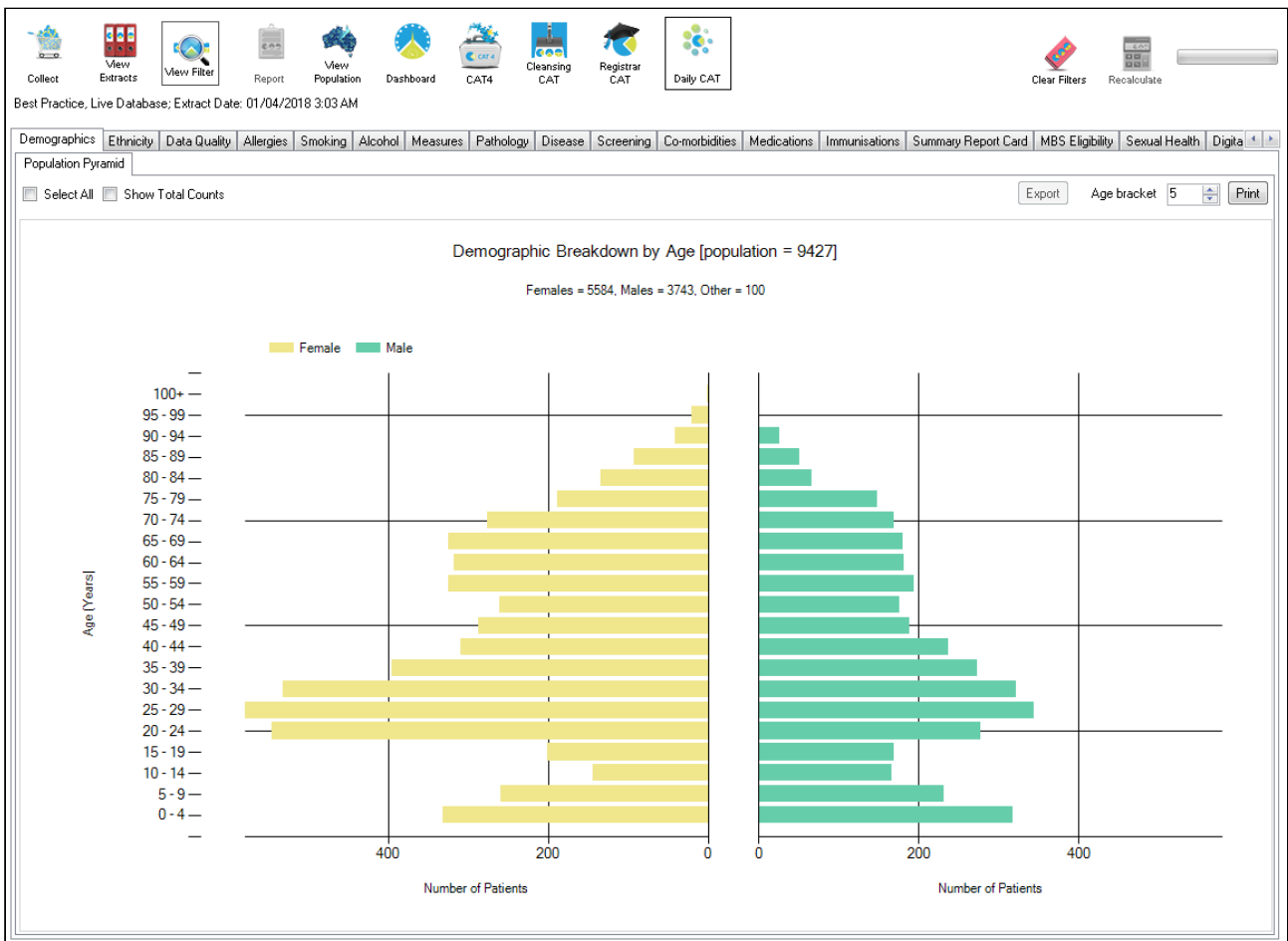
Currently the CAT Prompt functionality is only accessible from the 'Daily View' in CAT4. This is likely to change with future updates but in this first release we are limiting the number of available reports and graphs to what is visible in the 'Daily View'. To access the 'Daily View' click on the related icon on the Dashboard.

³ <https://help.pencs.com.au/display/CG/Linking+CAT4+to+Topbar>



This will display the 'Daily View' in the standard CAT4 interface. If you need more information on the general use of CAT4 please refer to the [CAT4 Functionality guide](#)⁴.

⁴ <https://help.pencs.com.au/display/CG/CAT4+User+Guide>



The reports available for prompts are:

[Demographics⁵](#)

[Ethnicity⁶](#)

[Data Quality \(CDSA\)⁷](#)

[Allergies⁸](#)

[Smoking⁹](#)

[Alcohol¹⁰](#)

[Measures¹¹](#)

[Pathology¹²](#)

5 <https://help.pencs.com.au/pages/viewpage.action?pagelId=1476486>

6 <https://help.pencs.com.au/display/CG/Ethnicity>

7 <https://help.pencs.com.au/pages/viewpage.action?pagelId=1476496>

8 <https://help.pencs.com.au/pages/viewpage.action?pagelId=1476500>

9 <https://help.pencs.com.au/display/CG/Smoking>

10 <https://help.pencs.com.au/display/CG/Alcohol>

11 <https://help.pencs.com.au/display/CG/Measures>

12 <https://help.pencs.com.au/display/CG/Pathology>

[Disease¹³](#)

[Screening¹⁴](#)

[Co-morbidities¹⁵](#)

[Medications¹⁶](#)

[MBS Eligibility¹⁷](#)

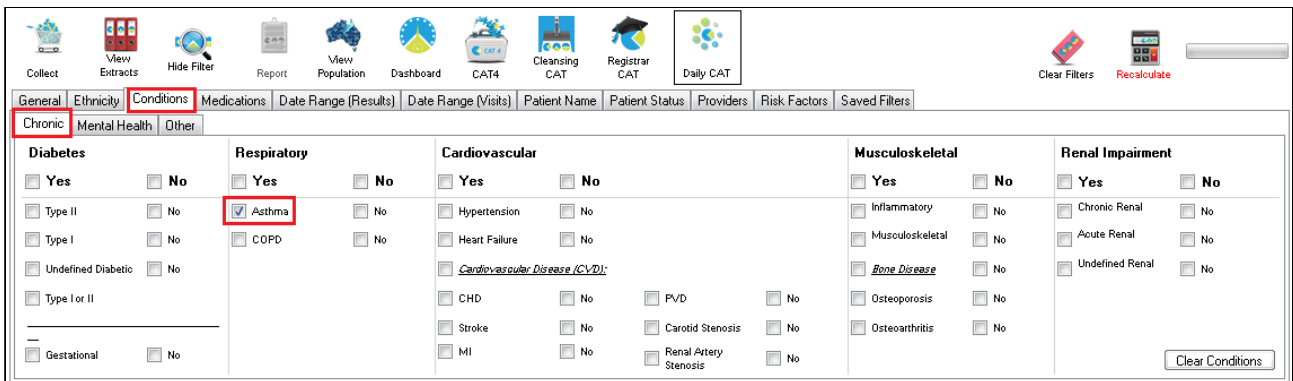
[Immunisations¹⁸](#)

[Sexual Health STI Screening¹⁹](#)

[My Health Record Status²⁰](#)

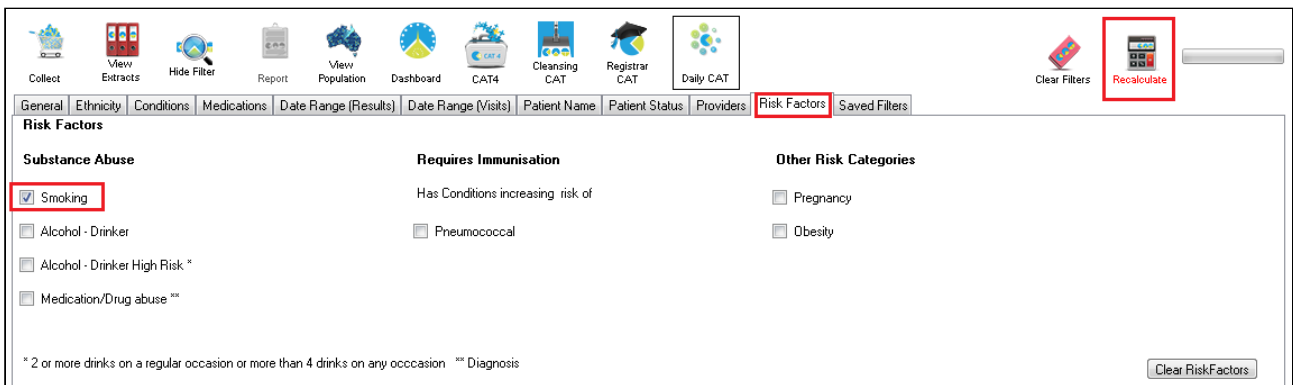
You are now able to combine filters and report selections to define the criteria for a prompt that will be displayed in Topbar when a patient is opened in the clinical system meeting the criteria.

In this example we will create a prompt alerting clinicians when a patient with Asthma who is a daily or irregular smoker presents to the clinic and has not had a spirometry result entered. To start the process we need to set up the filter for the condition asthma and risk factor smoking:

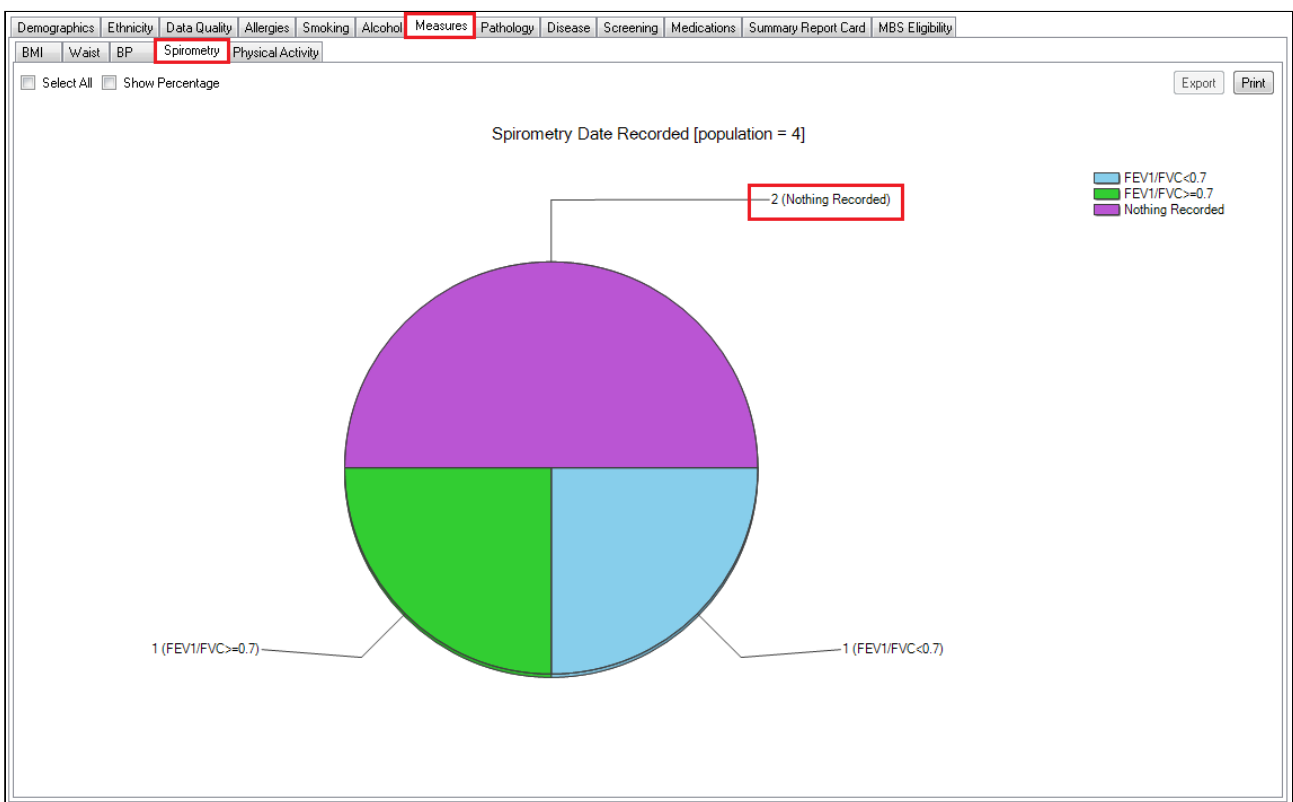


Then we add 'Smoking' from the risk factor tab and click on the 'Recalculate' button to apply the filter:

13 <https://help.pencs.com.au/display/CG/Disease>
 14 <https://help.pencs.com.au/display/CG/Screening>
 15 <https://help.pencs.com.au/display/CG/Co-morbidities>
 16 <https://help.pencs.com.au/display/CG/Medications>
 17 <https://help.pencs.com.au/display/CG/MBS+Eligibility>
 18 <https://help.pencs.com.au/display/CG/Immunisations>
 19 <https://help.pencs.com.au/display/CG/Sexual+Health+STI+Screening>
 20 <https://help.pencs.com.au/display/CG/My+Health+Record+Status>



Now we need to select only those patients with no spirometry results. This is done on the Measures/Spirometry report tab. As this is only an example, please remember that you can select multiple parts of one or more graphs to create the conditions for a CAT Prompt.



In this example, only two patients meet the chosen criteria. If any new patients are registered in the clinical system meeting the same criteria in the future, or existing patients are diagnosed with Asthma or start smoking, the created prompt will also apply to them as it is purely about matching the selected conditions, not the individual patients.

To create the prompt, we need to display the 'Patient Re-identification Report'. In this example a double click on the 'nothing recorded' section of the graph will display that report, but if multiple graphs are used to create the prompt the 'Report' button on the top of the screen has to be used.

At the bottom of the 'Patient Re-identification Report' the triangle will display a drop down menu with the option 'Prompt at Consult - Topbar'. This will create the CAT Prompt for patients meeting the selected conditions. Select it and then click on 'Go' to proceed.

The screenshot shows a window titled 'Patient Reidentification'. Inside, there is a 'Reidentify Report [patient count = 148]' with a sub-selection of 'Population Pyramid (Males, 75-79)'. Below this is a table with the following data:

ID	Surname	First Name	Known As	Sex	D.O.B (Age)	Address	City	Postcode
7555	Surname	Firstname_8	Firstname_8	M	01/02/1942 (76)	12 Jogger St	Suburb Town	5590
2738	Surname	Firstname_32	Firstname_32	M	01/02/1943 (75)	12 Jogger St	Suburb Town	5963
3926	Surname	Firstname_64	Firstname_64	M	01/02/1941 (77)	12 Jogger St	Suburb Town	4625
528	Surname	Firstname_99	Firstname_99	M	01/02/1939	12 Jogger St	Suburb	4733

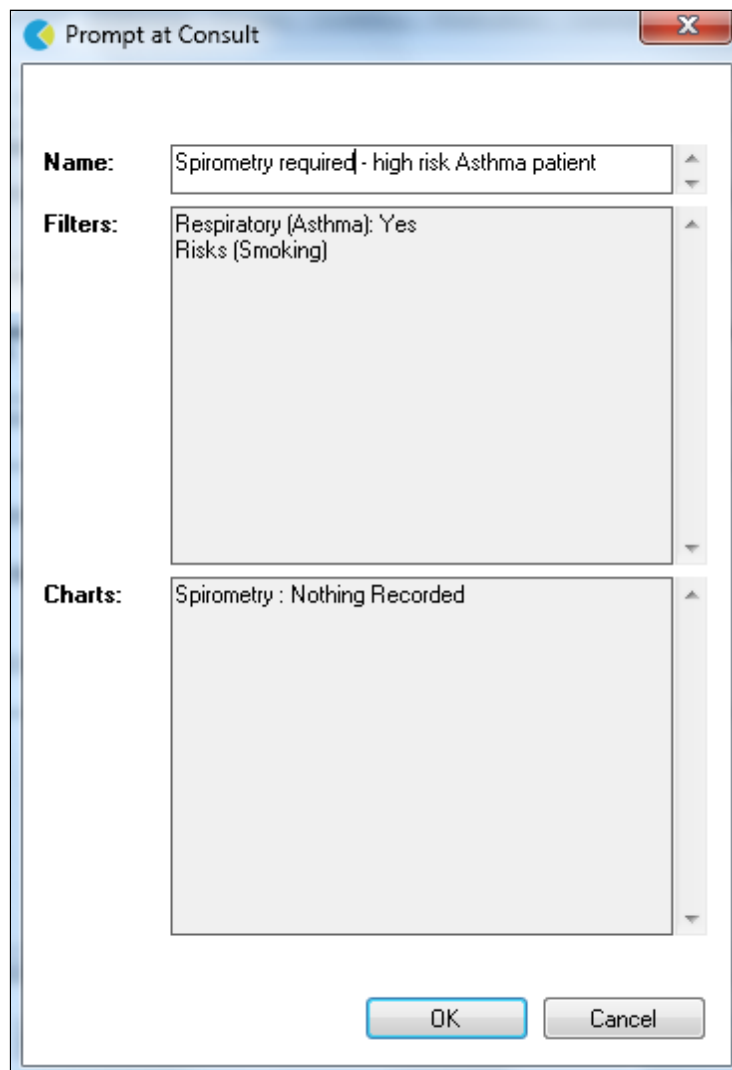
At the bottom of the window is a toolbar with several icons: 'Refine Selection', 'Add/Withdraw Patient Consent', 'SMS Recall', 'Voicemail Recall', and 'Topbar Prompt'. The 'Topbar Prompt' icon, which depicts a house, is highlighted with a red rectangular box.

The next window contains the details of your filter and charts selection, if any. In this example it shows the filter for Asthma and smoking, and the selected chart segment of 'nothing recorded' on the spirometry chart. The CAT Prompt needs to be given a name, this is the message that will be displayed along with the criteria in Topbar. It should be clearly describing the actions required for the patient. As this is a form of communication between practice staff we recommend to agree on the best way to word this prior to creating the prompts.

Clicking on OK will create the prompt and send it to Topbar.

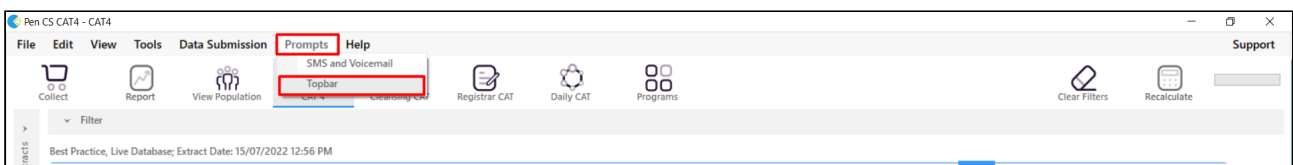
⚠ Prompts created in CAT4 will be visible instantly in Topbar and are by default active for all Topbar users. This can be changed in Topbar in the [Cat Plus Prompts App settings tab](#)²¹!

²¹ <https://help.pencs.com.au/display/TUG/CAT+Plus+Prompts+Settings>

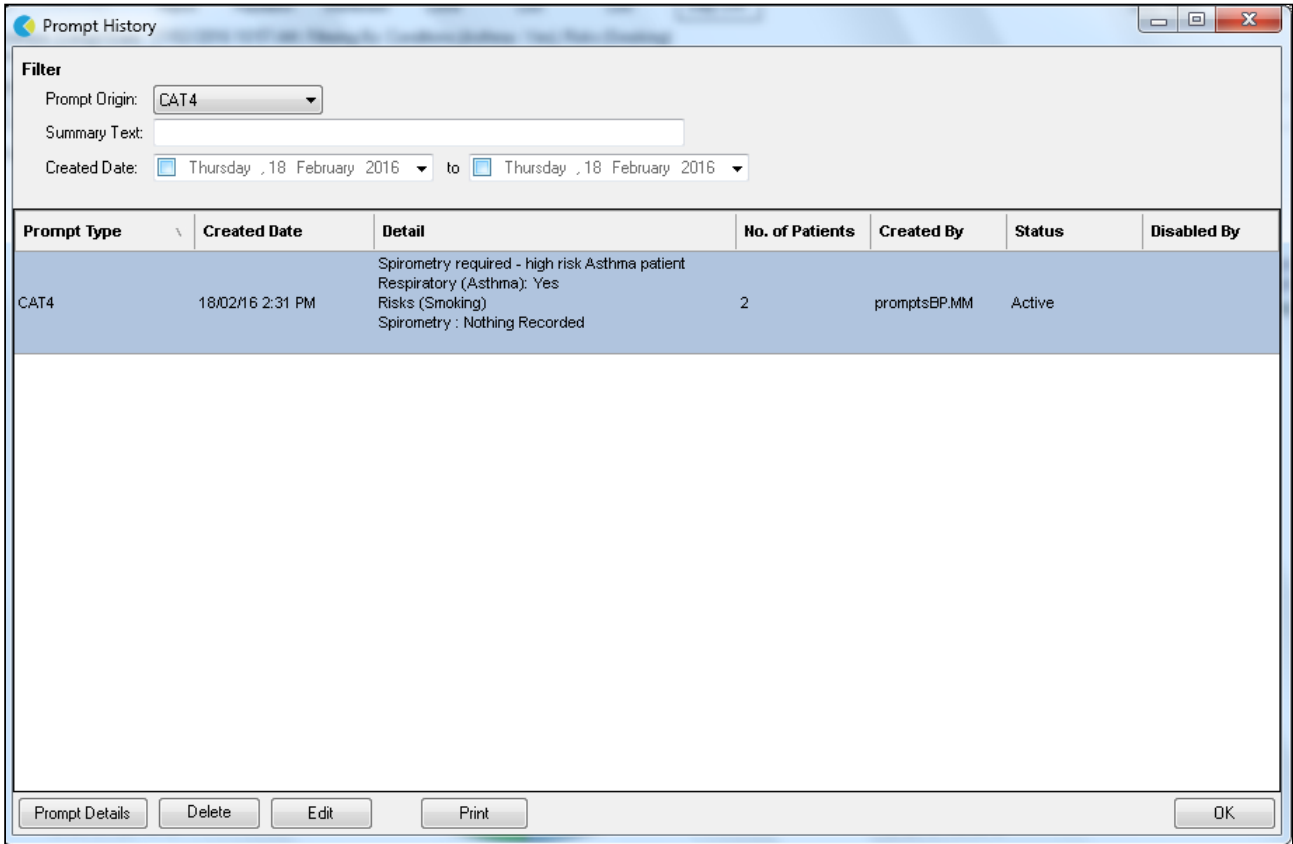


The above is only an example of a prompt, any filter and graph selection combination on the 'Daily View' in CAT4 can be used to create prompts. Please keep in mind that Topbar already prompts for missing demographic and clinical data, so additional prompts for a missing allergy status wouldn't be necessary.

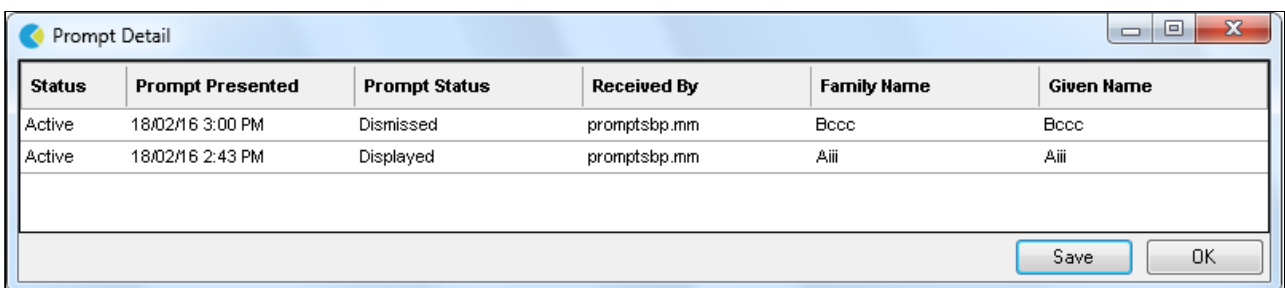
CAT4 can display all existing prompts and allows to remove prompts that are no longer needed. This will remove the prompt for all users at the clinic. To access existing prompts click on the 'Prompts' menu on the top of CAT4 and then select 'TopBar':



Prompts can be filtered by origin (CAT4 or PAT CAT), summary text and/or creation date. They can also be sorted by any of the displayed columns by clicking on the column name.



The buttons on the bottom of the window all you to see the details of the prompt including which patients matching the prompt criteria have been opened in the clinical system. Clicking on the 'Prompt Details' button will display the list of patients - this list is updated as more patients matching the prompt are opened and will take all Topbar users at the clinic into account.



The 'Received By' column will show the Topbar user at the clinic who opened the patient in their clinical system and the status will show if the prompt has been displayed, dismissed or deferred.

Prompts can be deleted or edited from the "Prompts History" screen using the respective buttons, and can be exported to comma delimited format with the 'Print' button. Deleting or editing an existing prompt will apply to all users at the clinic.

2.2 PAT CAT


2.2.1 Requirements

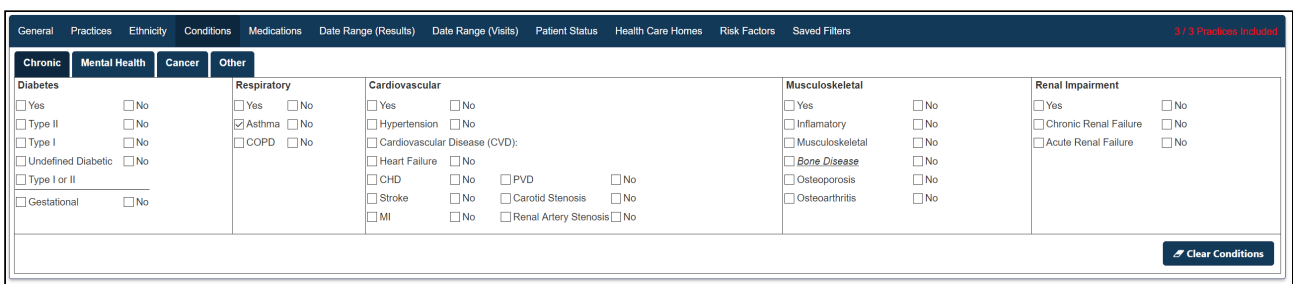
To use CAT Prompts you have to have the latest version of Topbar, CAT4 and PAT CAT installed. Please contact your PHN to enquire about how to get access to the CAT Plus suite. Only PHN or other organisation level users can access the prompts functionality in PAT CAT, practice level users won't have the icon when logged on.

To access the prompts module in PAT CAT click on the Prompts icon which shows the same design as Topbar.



The Prompts window will be displayed, showing existing prompts with details such as name, summary, date created and a count of how many prompts were dismissed and deferred. The status column shows if the prompt is currently active or inactive. From this screen existing prompts can be edited or deleted, please find the details in the [Viewing and Removing Prompts in PAT CAT²²](#) page.

 Before you create your prompt you need to consider if you need to apply a filter to your PAT CAT population using the available filters. For more details on filters in PAT CAT please see the [relevant chapter²³](#) in the PAT CAT user guide.



One consideration for the filter, besides from clinical criteria, would be which practices should receive the prompts. This can be selected in the 'Practices' filter tab. For this example I have filtered for one practice only and have added the condition 'Asthma' to the filter.

Once you have applied the relevant filter(s) and recalculated, you are ready to create a new prompt.

²² <https://help.pencs.com.au/display/ds/Viewing+and+Removing+Prompts+in+PAT+CAT>
²³ <https://help.pencs.com.au/display/ds/DATA+FILTERING>

Click on the '+Create Prompt' button on the top left of the window to start the process.

The screenshot shows a window titled 'Prompts'. At the top left, there is a button labeled '+ Create Prompt' which is highlighted with a red rectangular box. Below this button is a pagination bar with buttons for pages 1 through 10, an ellipsis, and a 'Last' button. The main area of the window contains a table with the following columns: Name, Summary, Reason, Date Created, Dismissed, Deferred, and Status. The table lists several prompts, including 'Creating male smoker prompt' and various medication-related prompts with conditions like '(Narcotics/Opioids - NO)', '(Narcotics/Opioids - YES)', '(Glitazones - NO)', '(Glitazones - YES)', '(Metformin - NO)', '(Metformin - YES)', '(Insulin H/ glycaemics - NO)', and '(Insulin H/ glycaemics - YES)'. At the bottom of the window, there is a 'Refresh Prompts List' button.

Name	Summary	Reason	Date Created	Dismissed	Deferred	Status
Creating male smoker prompt	Trying to create the male smoker prompt	Review the data	17/02/2016 11:57 AM	0	0	Active
Medications: (Narcotics/Opioids - NO)	Medications: (Narcotics/Opioids - NO)	Medications: (Narcotics/Opioids - NO)	8/02/2016 10:54 AM	0	0	Active
Medications: (Narcotics/Opioids - NO)	Medications: (Narcotics/Opioids - NO)	Medications: (Narcotics/Opioids - NO)	8/02/2016 10:02 AM	0	0	Active
Medications: (Narcotics/Opioids - YES)	Medications: (Narcotics/Opioids - YES)	Medications: (Narcotics/Opioids - YES)	8/02/2016 10:02 AM	0	0	Active
Medications: (Glitazones - NO)	Medications: (Glitazones - NO)	Medications: (Glitazones - NO)	8/02/2016 10:01 AM	0	0	Active
Medications: (Glitazones - YES)	Medications: (Glitazones - YES)	Medications: (Glitazones - YES)	8/02/2016 10:01 AM	0	0	Active
Medications: (Metformin - NO)	Medications: (Metformin - NO)	Medications: (Metformin - NO)	8/02/2016 10:00 AM	0	0	Active
Medications: (Metformin - YES)	Medications: (Metformin - YES)	Medications: (Metformin - YES)	8/02/2016 10:00 AM	0	0	Active
Medications: (Insulin H/ glycaemics - NO)	Medications: (Insulin H/ glycaemics - NO)	Medications: (Insulin H/ glycaemics - NO)	8/02/2016 10:00 AM	0	0	Active
Medications: (Insulin H/ glycaemics - YES)	Medications: (Insulin H/ glycaemics - YES)	Medications: (Insulin H/ glycaemics - YES)	8/02/2016 10:00 AM	0	0	Active

In the 'Create Prompt' window you will see a list of currently active filters on top of the screen. You can now add more criteria to the active filters using the individual report sections to select your criteria. The condition 'Asthma' in my filter could have also been added through the 'Disease' report by selecting 'Asthma' there. PAT CAT and CAT4 often provide multiple ways on how to achieve the same outcome.

Create Prompt

Filter: Filtering By: Practice: (Prac_MM_BP1), Conditions: (Asthma - YES)

Name:

Status:

Summary:

Reason:

- > Demographics
- > Ethnicity
- > Allergies
- > Smoking
- > Alcohol
- > BMI Count
- > Waist CVD Risk
- > Waist Diabetes Risk
- > BP
- > Spirometry
- > Physical Activity
- > Cholesterol
- > Total Chol/HDL Ratio
- > HDL
- > LDL
- > Triglycerides
- > eGFR

For this example I am creating a prompt that will alert Topbar users at the specified clinic if a patient presents who has Asthma, who is daily or irregular smoker and never had a spirometry test entered. The test name should be the message that informs the clinician what to do, and in the 'Summary' and 'Reason' fields additional information can be given. All three fields need to be filled in.

To filter for this I am using the [practice filter](https://help.pencs.com.au/display/ds/Practices+Filtering)²⁴ to select the practice(s) of interest and the [conditions filter](https://help.pencs.com.au/display/ds/Conditions+Filtering)²⁵ to find patients with asthma.

²⁴ <https://help.pencs.com.au/display/ds/Practices+Filtering>

²⁵ <https://help.pencs.com.au/display/ds/Conditions+Filtering>

Create Prompt
✖

Filter: Filtering By: Practice: (Prac_MM_BP1), Conditions: (Asthma - YES)

Name: Patient has Asthma and smokes, please perform Spirometry test

Status: Active

Summary: Patients with Asthma who are daily or irregular smokers with no record of spirometry results at clinic Prac_MM_BP1 will receive this prompt

Reason: Patients who smoke and have respiratory conditions are at high risk

- > Demographics
- > Ethnicity
- > Allergies
- ▼ Smoking
 - Daily Smoker
 - Irregular Smoker
 - Ex Smoker
 - Never Smoked
 - Nothing Recorded
 - Age<10 and Nothing Recorded
- > Alcohol
- > BMI Count
- > Waist CVD Risk
- > Waist Diabetes Risk
- > BP
- ▼ Spirometry
 - FEV1/FVC<0.7
 - FEV1/FVC>=0.7
 - Nothing Recorded

Save

Once your prompt is complete, click on 'Save' to save the new prompt. Once saved, your new prompt will be displayed on top of the list of existing prompts. You can click on 'Refresh Prompts List' if you can't see your newly created prompt.

Prompts

+ Create Prompt

1 2 3 4 5 6 7 8 9 10 ... Last

Name	Summary	Reason	Date Created	Dismissed	Deferred	Status
Patient has Asthma and smokes, please perform Spirometry test	Patients with Asthma who are daily or irregular smokers with no record of spirometry results at clinic Prac_MM_BP1 will receive this prompt	Patients who smoke and have respiratory conditions are at high risk	22/02/2016 2:00 PM	0	0	Active
Medications: (Narcotics/Opioids - NO)	Medications: (Narcotics/Opioids - NO)	Medications: (Narcotics/Opioids - NO)	8/02/2016 10:54 AM	0	0	Active
Medications: (Narcotics/Opioids - NO)	Medications: (Narcotics/Opioids - NO)	Medications: (Narcotics/Opioids - NO)	8/02/2016 10:02 AM	0	0	Active
Medications: (Narcotics/Opioids - YES)	Medications: (Narcotics/Opioids - YES)	Medications: (Narcotics/Opioids - YES)	8/02/2016 10:02 AM	0	0	Active
Medications: (Glitazones - NO)	Medications: (Glitazones - NO)	Medications: (Glitazones - NO)	8/02/2016 10:01 AM	0	0	Active
Medications: (Glitazones - YES)	Medications: (Glitazones - YES)	Medications: (Glitazones - YES)	8/02/2016 10:01 AM	0	0	Active

Refresh Prompts List

⚠ Please note that prompts created in PAT CAT are currently send to Topbar overnight - you will NOT see the new prompts taking instant effect in the practices!
 PAT CAT prompts are not active in Topbar by default and need to be activated for each user before they will be displayed.

Once prompts are created in PAT CAT, they can be removed through the 'Prompts' icon on top of the screen.



The Prompts window will display all existing prompts, clicking on one of the prompts will allow you to edit the prompt. Information about Dismissed and Deferred numbers and the status (active/inactive) indicates if the prompts is active in Topbar are sent once a day (over night) to PAT CAT. Please see the [Topbar CAT Prompts guide](#)²⁶ on how to activate/inactivate prompts on the clinic level.

²⁶ <https://help.pencs.com.au/display/TUG/Using+CAT+Prompts+in+Topbar>

Prompts

+ Create Prompt

1 2 3 4 5 6 7 8 9 10 ... Last

Name	Summary	Reason	Date Created	Dismissed	Deferred	Status
Patient has Asthma and smokes, please perform Spirometry test	Patients with Asthma who are daily or irregular smokers with no record of spirometry results at clinic Prac_MM_BP1 will receive this prompts	Patients who smoke and have respiratory conditions are at high risk	22/02/2016 2:00 PM	0	0	Active
Patient has Asthma and smokes, please run Spirometry test	Patients with Asthma who are daily or irregular smokers with no record of spirometry results at clinic Prac_MM_BP1 will receive this prompts	Patients who smoke and have respiratory conditions are at high risk	22/02/2016 11:59 AM	0	0	Active
Creating male smoker prompt	Trying to create the male smoker prompt	Review the data	17/02/2016 11:57 AM	0	0	Active
Medications: (Narcotics/Opiods - NO)	Medications: (Narcotics/Opiods - NO)	Medications: (Narcotics/Opiods - NO)	8/02/2016 10:54 AM	0	0	Active
Medications: (Narcotics/Opiods - NO)	Medications: (Narcotics/Opiods - NO)	Medications: (Narcotics/Opiods - NO)	8/02/2016 10:02 AM	0	0	Active
Medications: (Narcotics/Opiods - YES)	Medications: (Narcotics/Opiods - YES)	Medications: (Narcotics/Opiods - YES)	8/02/2016 10:02 AM	0	0	Active
Medications: (Glitazones - NO)	Medications: (Glitazones - NO)	Medications: (Glitazones - NO)	8/02/2016 10:01 AM	0	0	Active
Medications: (Glitazones - YES)	Medications: (Glitazones - YES)	Medications: (Glitazones - YES)	8/02/2016 10:01 AM	0	0	Active

Refresh Prompts List

Currently the only option to edit a prompt is to delete it by using the 'Delete' button on the bottom right.

Edit Patient has Asthma and smokes, please perform Spirometry test

Filter: Filtering By: Practice: (Prac_MM_BP1), Conditions: (Asthma - YES)

Name:

Status:

Summary:

Reason:

- > Demographics
- > Ethnicity
- > Allergies
- > Smoking
- > Alcohol
- > BMI Count
- > Waist CVD Risk
- > Waist Diabetes Risk
- > BP
- > Spirometry
- > Physical Activity
- > Cholesterol
- > Total Chol/HDL Ratio
- > HDL
- > LDL
- > Triglycerides
- > eGFR

Delete

Save

2.3 Topbar

2.3.1 Background

CAT Prompts are created in CAT4 (on the practice level) or in PAT CAT (on the PHN or other organisation level). Prompts created in PAT CAT will have to be activated by the practice before they are displayed in Topbar and are sent once a day (over night) from PAT CAT to Topbar. Prompts created in CAT4 in the practice are effective immediately and don't need any further activation in Topbar to be displayed.

Topbar has to be linked to CAT4 in the practice to display CAT Prompts created locally, the details are explained [here](#)²⁷.

The clinic has to be set up in PAT CAT to receive prompts created in PAT CAT, the details are explained in the [PAT CAT Prompts guide](#)²⁸.

²⁷ <https://help.pencs.com.au/display/CG/Linking+CAT4+to+Topbar>

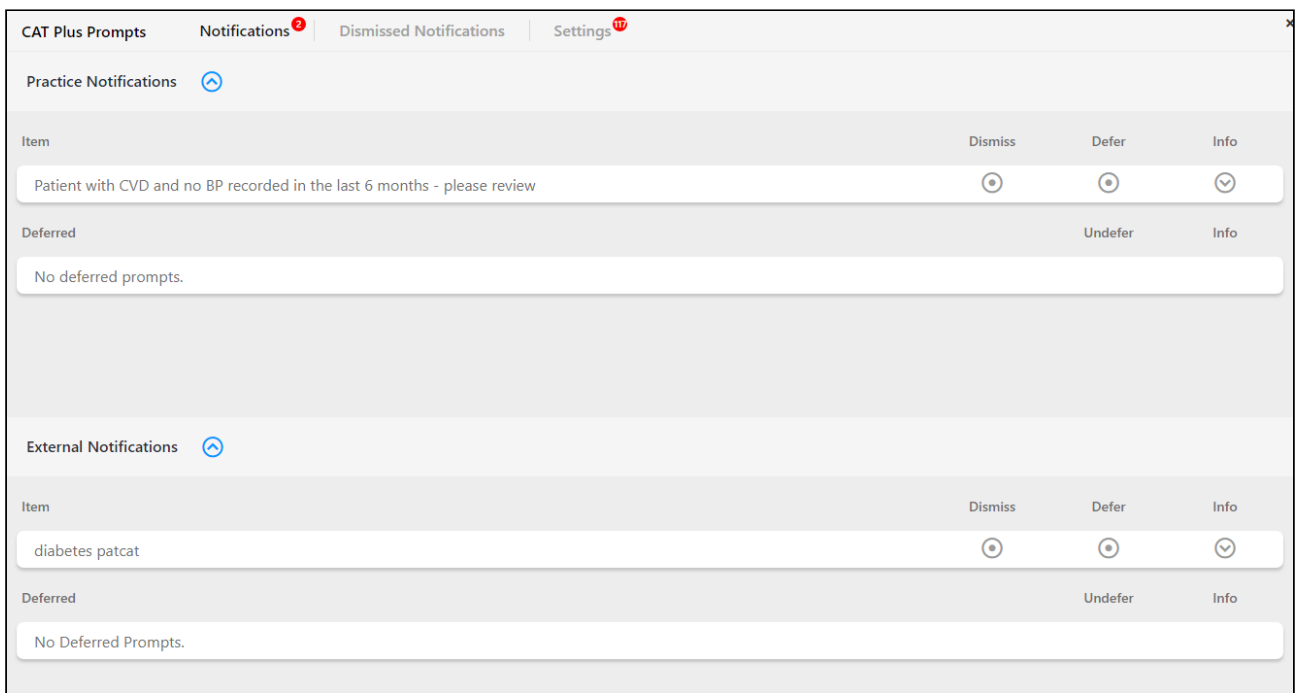
²⁸ <https://help.pencs.com.au/display/ds/Setting+up+CAT+Prompts+in+PAT+CAT>

2.3.2 Displaying Prompts

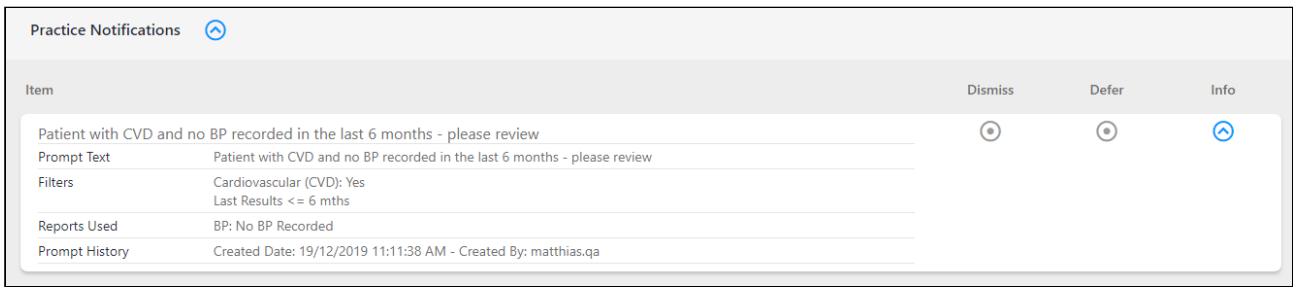
Once a patient is opened in the clinical system matching the criteria of the prompt, the CAT Prompts App in Topbar will display a notification. As with all Topbar apps, the notification is displayed as a red circle with the number of notifications in the circle. In the example below the patient has two notification in the CAT Prompts App.



To open the CAT Prompts App click on 'CAT Plus Prompts' in Topbar to display the full screen. Prompts displayed for the patient are labelled according to the name given to the prompt when created, and also show which software was used to create the prompt. In the example below we can see one prompt originating from the clinic (Practice Notifications) and one external notifications



Clicking on the down arrow will display further details as shown below. The details show the reason entered when the prompt was created and which reports and/or filters were used. For external notifications the organisation who created the prompt is shown along with the date and time. Prompts created in in the practice in CAT4 will show the CAT4 user who created the prompt. In the 'Reports Used' section only those report sections that match the patient's details are displayed, in the example below the patient has coronary heart disease and no blood pressure recorded in the last six months.



The prompt(s) will disappear when the patient doesn't meet the criteria specified in the prompt criteria any more. In the example above the action required is:

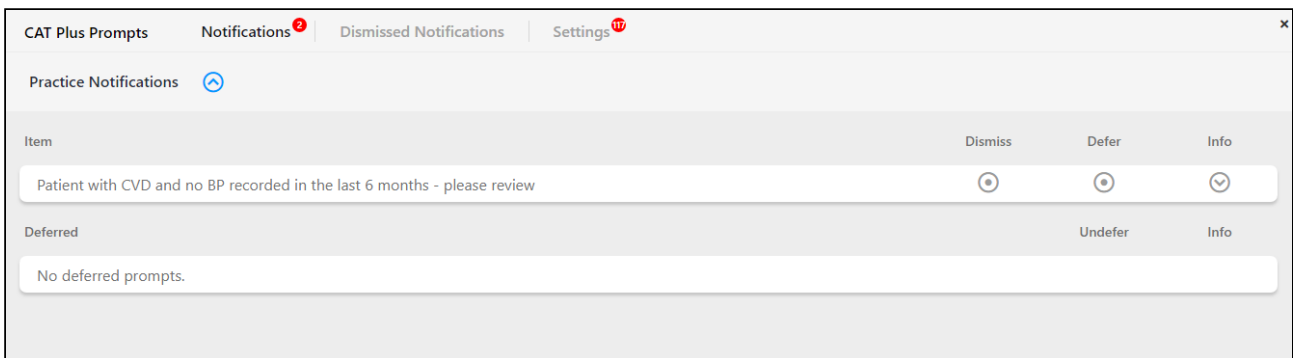
- the patient's BP is entered

This change will make the prompt disappear as the patient now doesn't meet the criteria any more. The same principle works for patients that through a change in their condition or status meet the criteria - these will trigger the prompt to display after their record is updated.

From the Cat Plus Prompts app screen prompts can be dismissed or deferred using the respective button. Dismissing a prompt will open up an optional field for a dismissal reason. Clicking on 'Cancel' will return to the previous screen and not dismiss the prompt.

Dismissed or deferred external notifications are recorded and their status will be shown in PAT CAT after the nightly update, for details please refer to the section on [viewing and removing prompts in PAT CAT](#).²⁹

Dismissed or deferred practice notifications are recorded and their status will be shown in CAT4 after a new collect, for details please refer to the section on [viewing and editing prompts in CAT4](#).³⁰



Deferring a prompt will by default defer until three months from today's date, but the date can be changed to a custom date if required. An optional reason for deferring can be entered below.

29 <https://help.pencs.com.au/display/ds/Viewing+and+Removing+Prompts+in+PAT+CAT>

30 <https://help.pencs.com.au/display/CG/Viewing+and+Editing+CAT+Prompts+in+CAT4>

Defer this notification? ✕

Defer until: 📅

Optional Reason:

Defer

❗ Dismissing or Deferring a prompt will remove this prompt for the currently selected patient only and will affect all users at the practice.



CAT Plus Prompts can be turned on or off depending on the user's preference. This applies to all prompts, regardless if they were created in CAT4 (locally) or PAT CAT prompts created at the PHN or other organisation.






❗ CAT4 prompts (practice notifications) that are created at the practice are turned ON for all users by default, where as external notifications are turned OFF by default and need to be activated first to be displayed for each user who wants to work with external notifications.


To access the settings click on the 'SETTINGS' tab in the cat plus prompts app screen. Existing prompts are displayed sorted by origin, Practice notifications first then external notifications.

The display status column shows if the prompt is active (blue circle) or disabled (grey circle).

CAT Plus Prompts		
Notifications 1		
Dismissed Notifications		
Settings 12		
Practice Notifications ↕		
Item	Display Status	Info
High Risk Patient with CD and no influenza vaccination recorded this year	●	⌵ NEW
Patient with CVD and no BP recorded in the last 6 months - please review	●	⌵ NEW
Notifiable Disease diagnosed - Chlamydia	●	⌵ NEW
External Notifications ↕		
Item	Display Status	Info
aboriginal male cvd - patcat	●	⌵ NEW
diabetes patcat	●	⌵ NEW
Mental Health Patcat	●	⌵ NEW

To see the details of the notifications you need to click on the  down arrow. In 'Filters Used' and 'Reports Used' sections the full criteria of the prompts are displayed. This is different from the prompt details displayed when clicking on the prompt on the notification screen, where only the matching criteria in the patient's record are displayed. Close the details by clicking on the up arrow .

CAT Plus Prompts		Notifications ¹	Dismissed Notifications	Settings ^{1E}
Practice Notifications 				
Item		Display Status	Info	
High Risk Patient with CD and no influenza vaccination recorded this year			 NEW	
Patient with CVD and no BP recorded in the last 6 months - please review	Patient with CVD and no BP recorded in the last 6 months - please review			
Prompt Text	Patient with CVD and no BP recorded in the last 6 months - please review			
Filters	Cardiovascular (CVD): Yes Last Results <= 6 mths			
Reports Used	BP: No BP Recorded			
Prompt History	Created Date: 19/12/2019 11:11:38 AM - Created By: matthias.qa			




 **Activating or Disabling prompts in Topbar is a per user setting! It will only affect the currently logged on user as this is part of the customisation options of Topbar.**

3 CAT PLUS SCHEDULER V3 INSTALLATION GUIDE



- [Pre-requisites for installing PCS Scheduler](#)(see page 39)
- [Updating Scheduler V2 to V3](#)(see page 39)
- [Installing and configuring PCS Scheduler v3.0 and above including CAT40](#)(see page 40)

Document Control

Version	Release Date	Modified By	Description
0.1	 03 Jun 2016	Loretta Sciarrone	Initial draft
0.2	 06 Jun 2016	Loretta Sciarrone	Instructions inserted for scheduler
1.0	 21 Jun 2016	Yupar Nyo	Finalized
1.1	 22 Jun 2016	Matthias Merzenich	Updated for online documentation

3.1 Pre-requisites for installing PCS Scheduler

CAT4 & PCS Scheduler version 3.0 and above require .NET4 full profile or above.

Manually check if .NET4 or higher full profile has been installed on the client's server via *Control Panel, Programs and Features*.

If **.NET4 full profile** has not been installed, download **.NET4 full profile** from Microsoft - **Microsoft .Net Framework 4 (Web Installer)**³¹ or higher on the client's server.

3.2 Updating Scheduler V2 to V3

- As a precautionary step, backup the existing Scheduler related xml files, named *Schedule.xml* and *ScheduleConfiguration.xml*, which are located in an existing Scheduler version 2.0 installation folder known as *C:\Program Files (x86)\Pen Computer Systems\PCS Scheduler Service*. Please save the backups in Temp folder on the machine.
- Stop PCS Scheduler Service if it is running via *Control Panel, Administrative Tools, Services*.
- Uninstall the existing Scheduler v2.0 on the client's server via Control Panel.
- Once the Scheduler v2.0 is uninstalled, existing *Schedule.xml* and *ScheduleConfiguration.xml* should still remain.

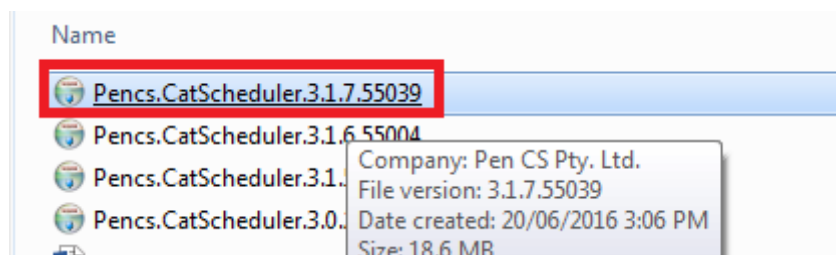
³¹ <http://www.microsoft.com/en-us/download/confirmation.aspx?id=17851>

- Uninstall the existing CAT version on the client's server via Control Panel.
- Ensure there is no "ClinicalAudit4.exe" process running in the task manager after CAT is uninstalled.

3.3 Installing and configuring PCS Scheduler v3.0 and above including CAT40

1.

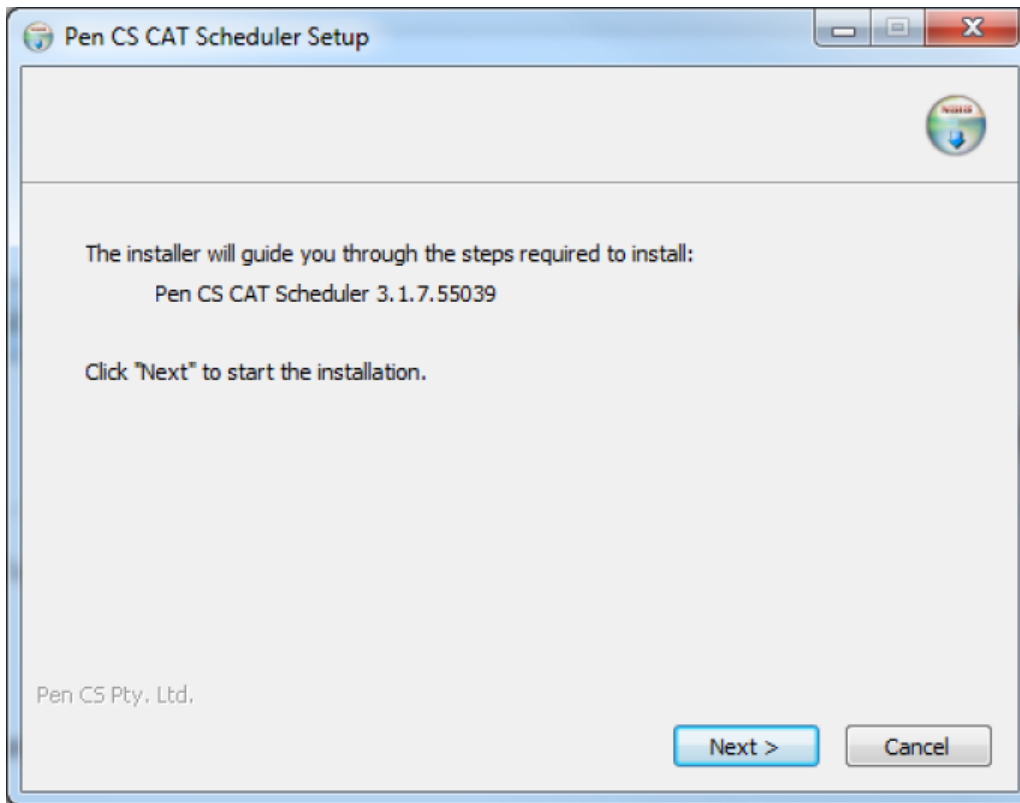
Double click on *Pen CS CAT Scheduler<version number>.exe* once it is made available to you.



2.

The installer wizard will guide you through the steps required to install the PenCS CAT Scheduler 3.0 and above, including CAT.

Click **Next** to start the installation.



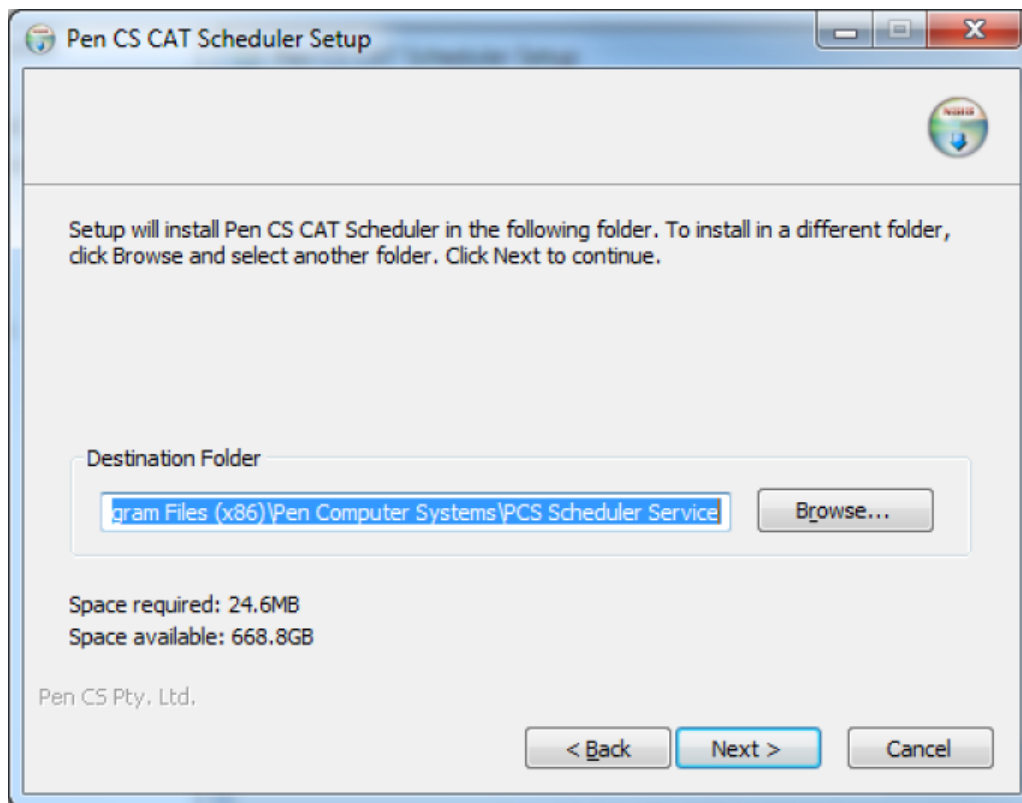
3.

PenCS CAT scheduler will detect the correct location for saving the file **selecting the correct folder**. There should not be a need to change the folder location.

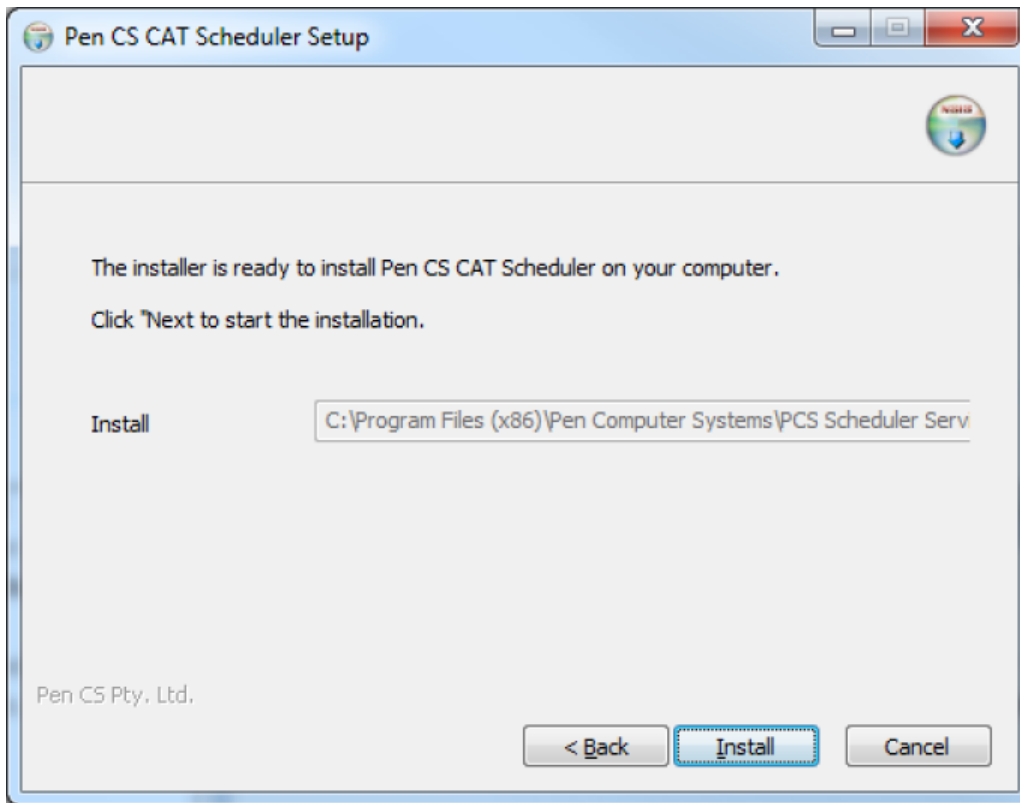
Click **next**.

Please note that there is a space requirement of up to **25MB**. This dialogue box displays the space required vs space available on the machine.

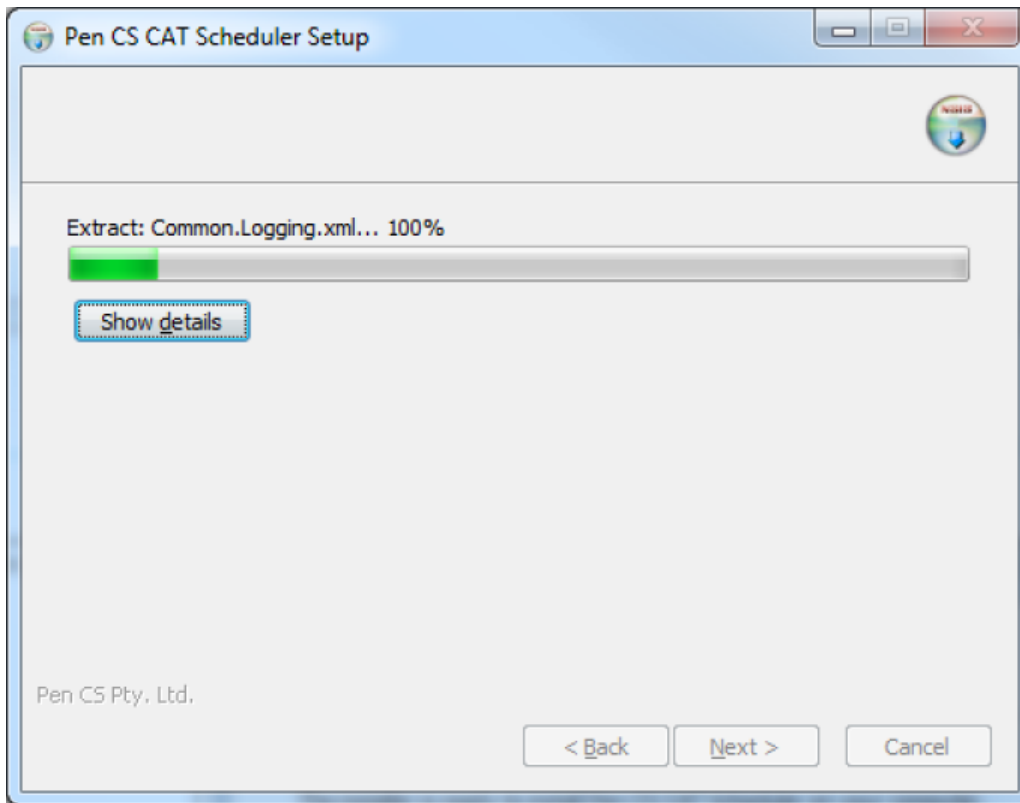
If a practice does not have enough space to install the scheduler, then they will have to contact their IT personnel to create sufficient space for the scheduler installation.



4. Click **Install** to start the installation process.



5. The progress bar will indicate the percentage of completion of the installation.

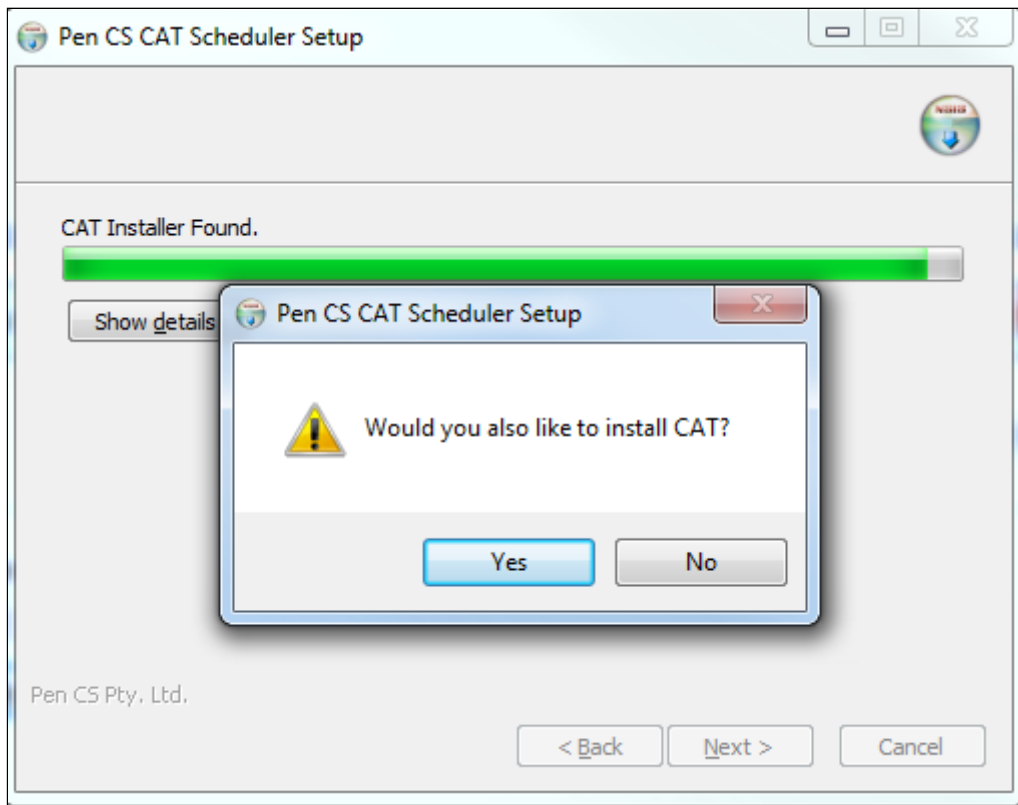


6.

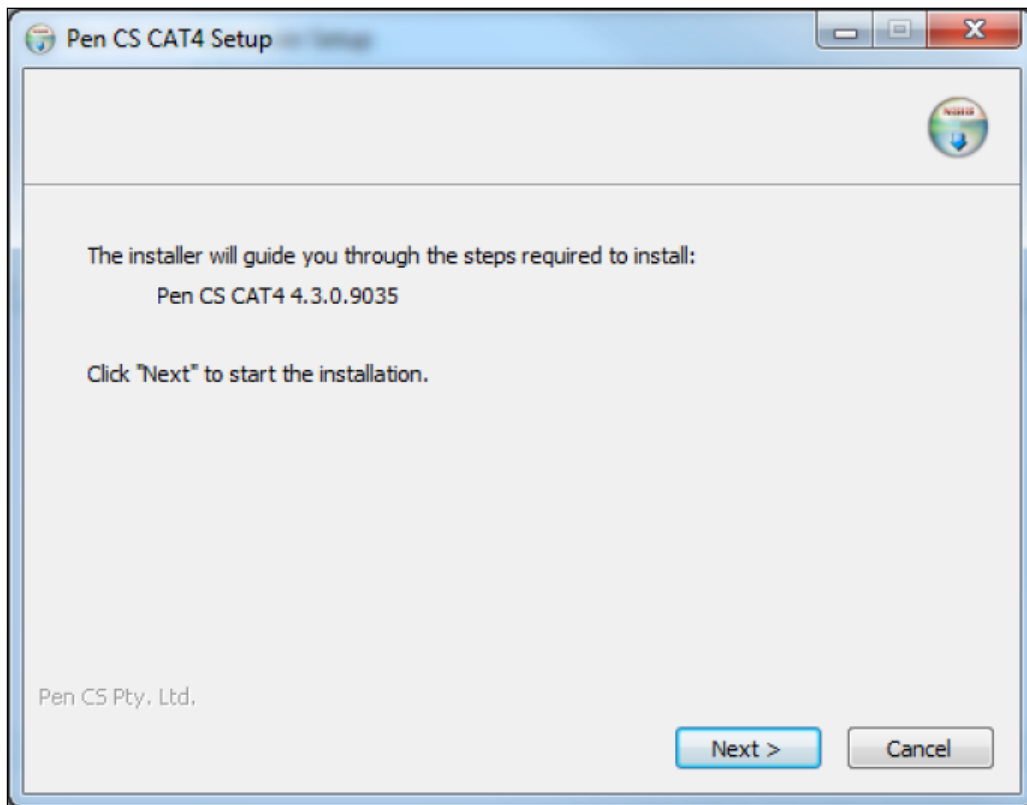
Next, you will be asked if you would like to install CAT.

For the scheduler to be installed correctly the first time, CAT must be installed with the scheduler.

Click **YES**.



7. Next, the installer will install CAT as part of the wizard. Click **Next** to start the installation.



8.

The scheduler installer will automatically detect the destination folder location and this will be shown in the **Destination Folder** field.

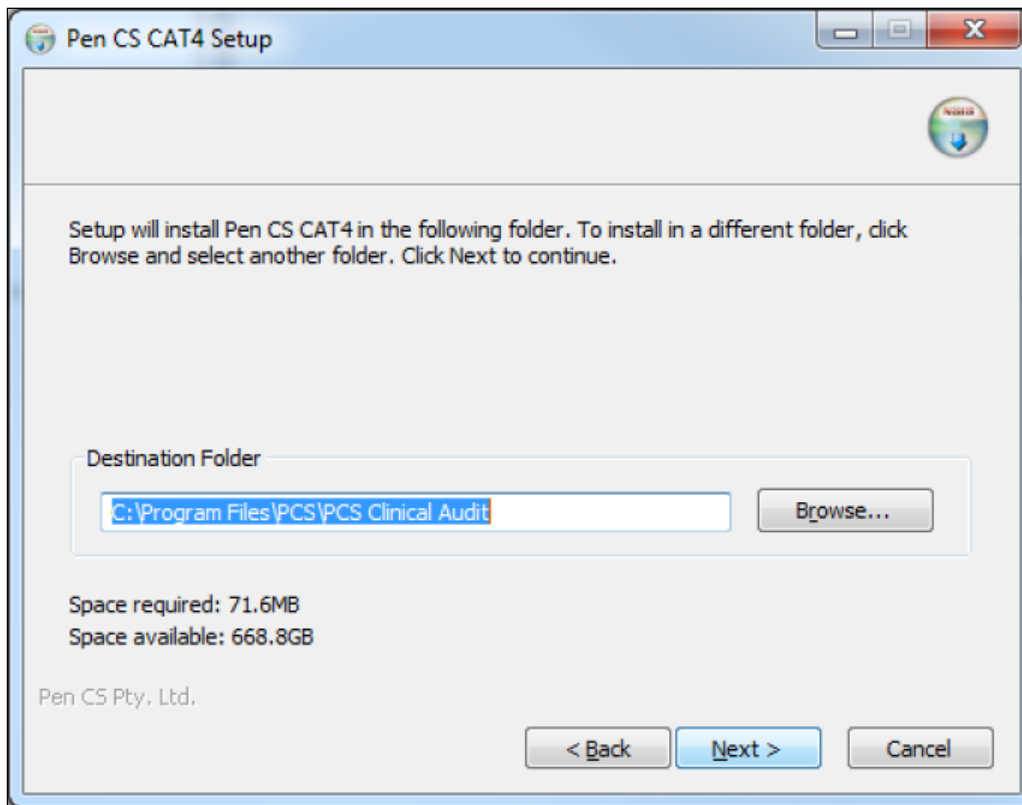
Check the Destination Folder name and location which should be:

C:\Program files\PCS\PCS Clinical Audit

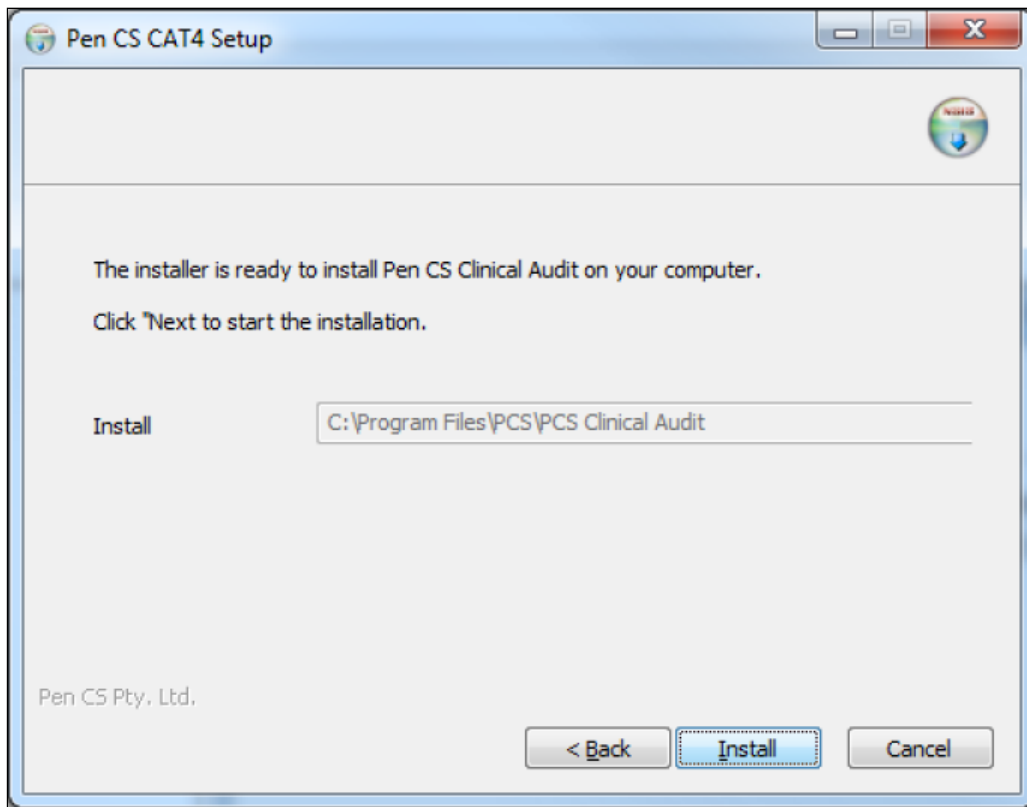
Click **Next** to continue.

Is the above correct? Does it have to be the folder mentioned or can the user choose a different folder?

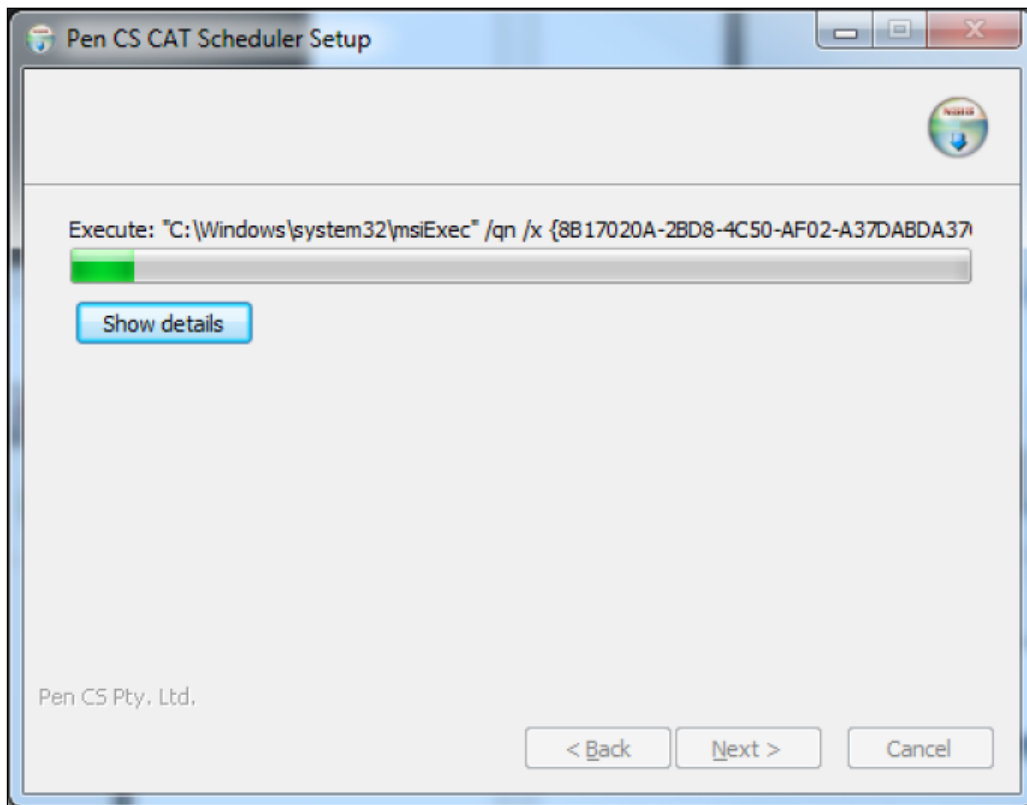
What if another folder is detected?



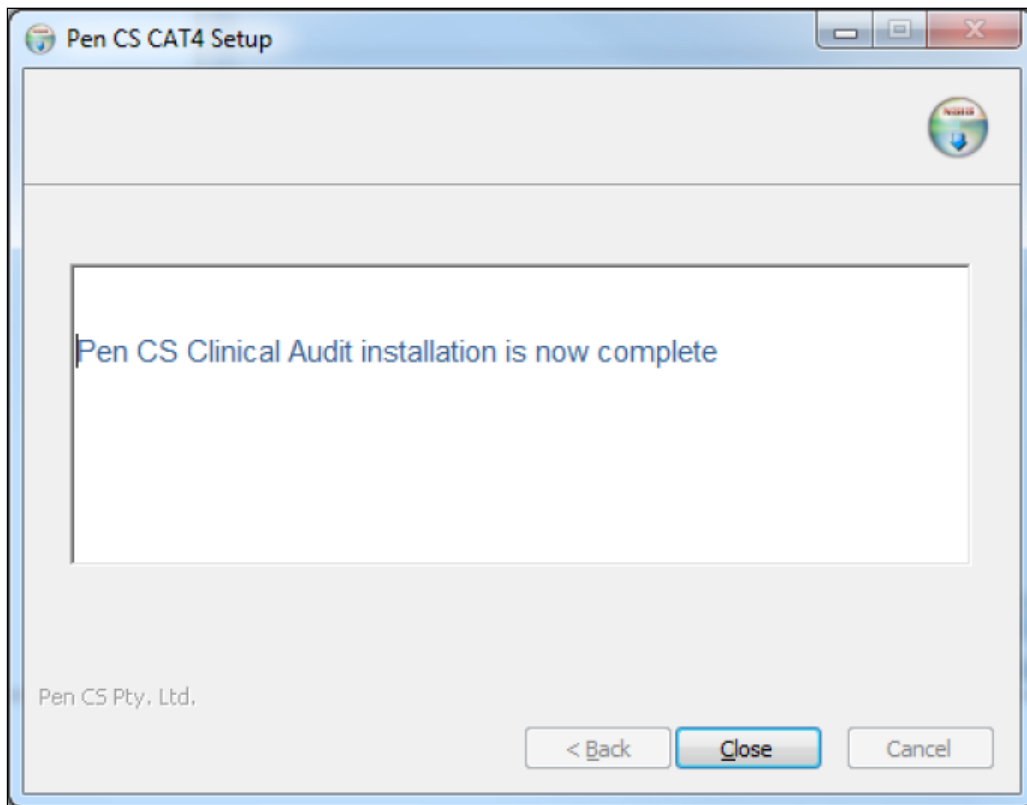
9. Click **Install** to install CAT.



10. The progress bar indicates the installation status.



11. The dialogue box displays that the CAT installation is now complete. Click **Close**.

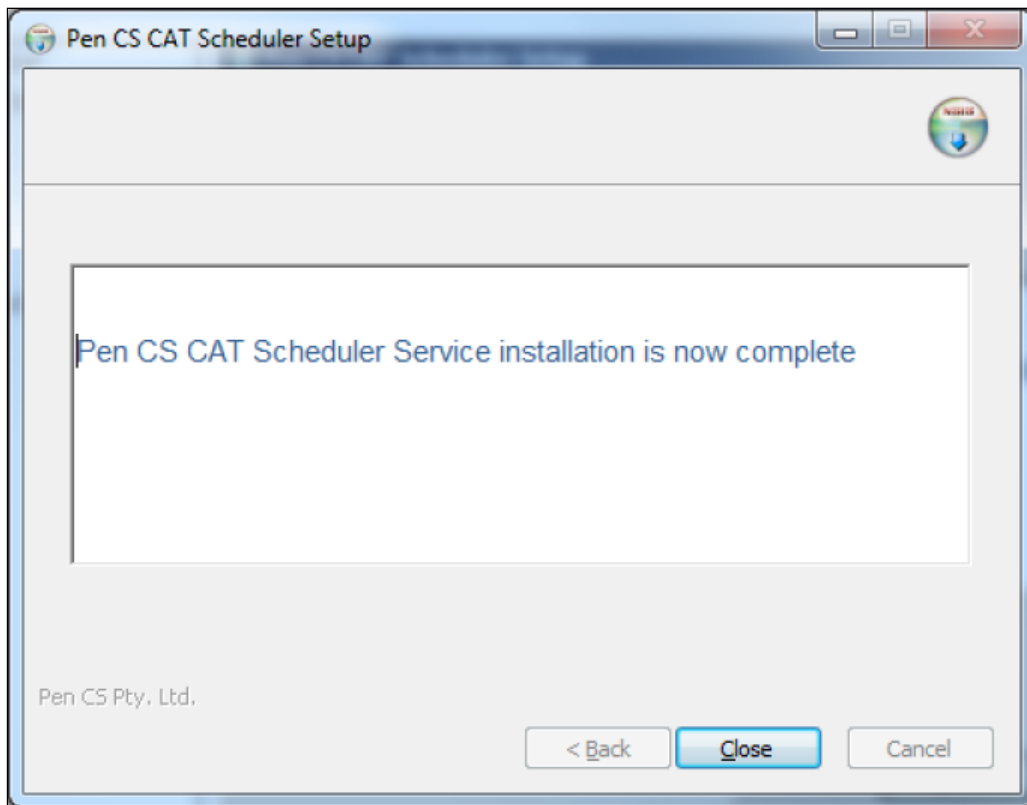


12.

The next dialogue box indicates that the Scheduler Service installation is complete.

Click **Close**.

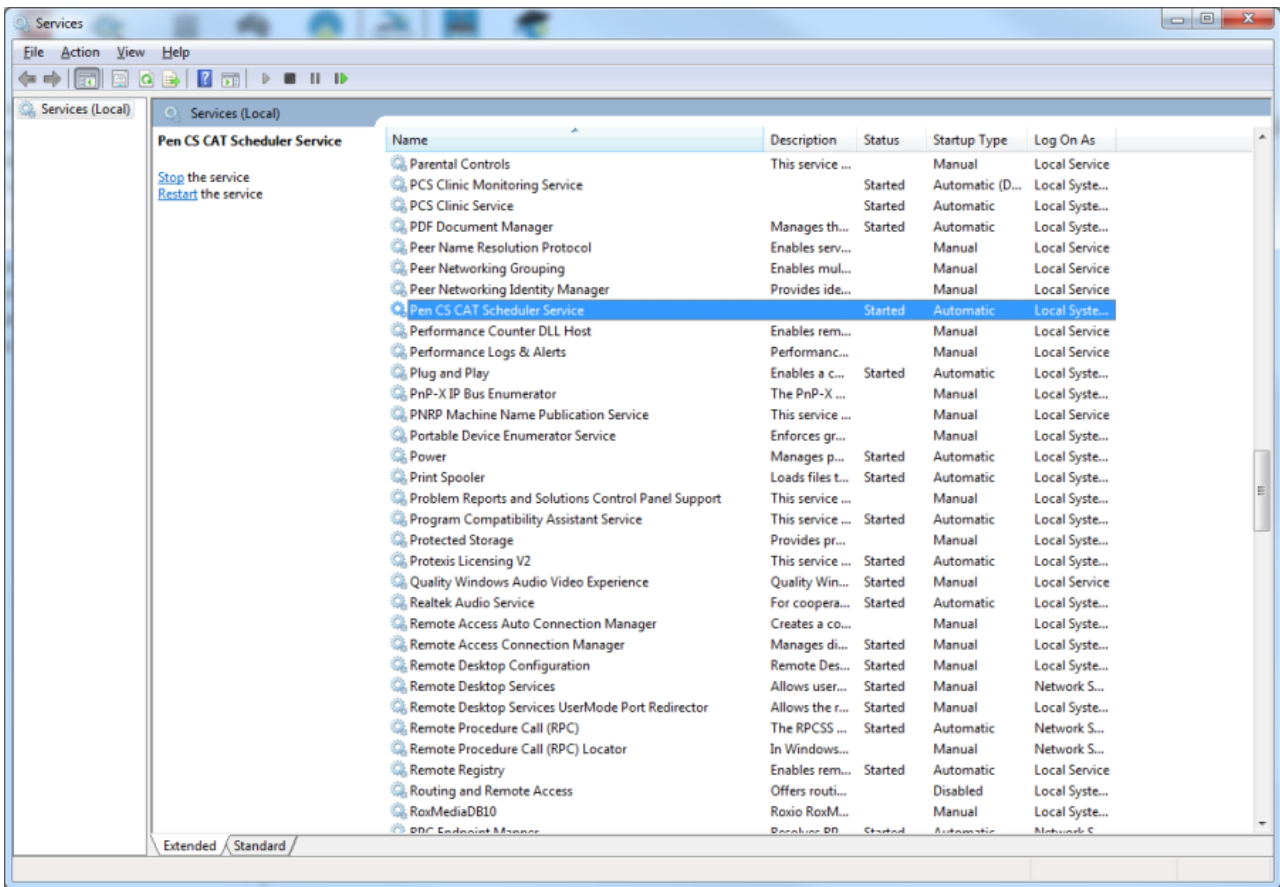
The installer wizard has now been completed successfully with Scheduler service and CAT4 installed. See next step for configuration.



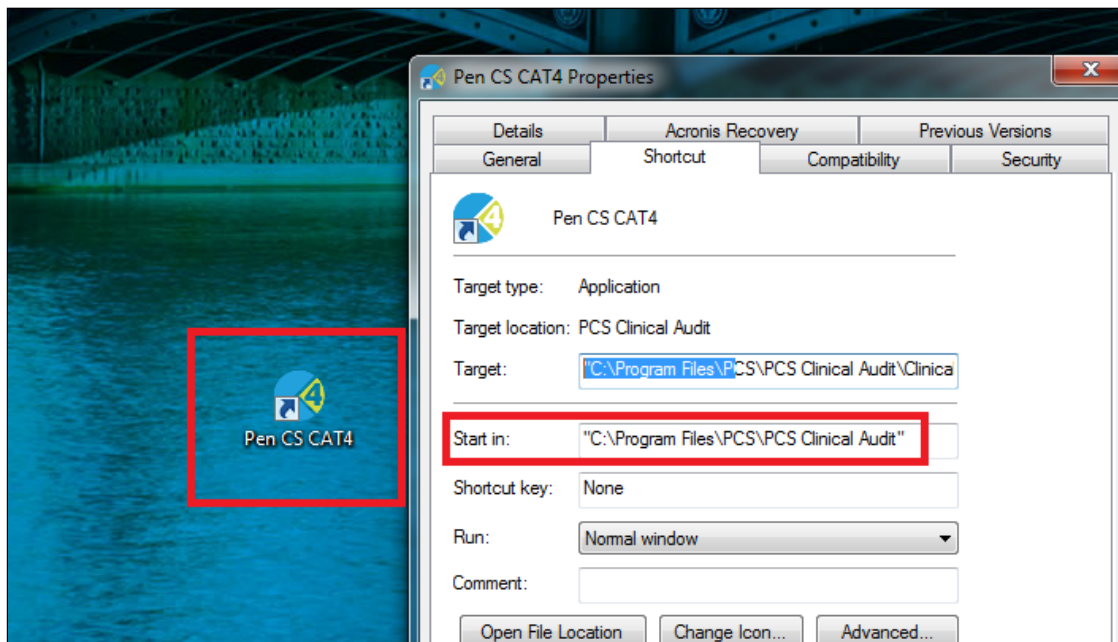
12.1

Verifying Scheduler service and CAT4 installation

1. Navigate to *Control Panel, Administrative Tools, Services* to see **PEN CS CAT Scheduler Service** installed, and running as default.



2.Navigate to Desktop to see Pen CS CAT 4 ,which has been installed as part of the Scheduler wizard, starts from **C:\Program Files\PCS\PCS Clinical Audit** folder. It is not a ClickOnce version.

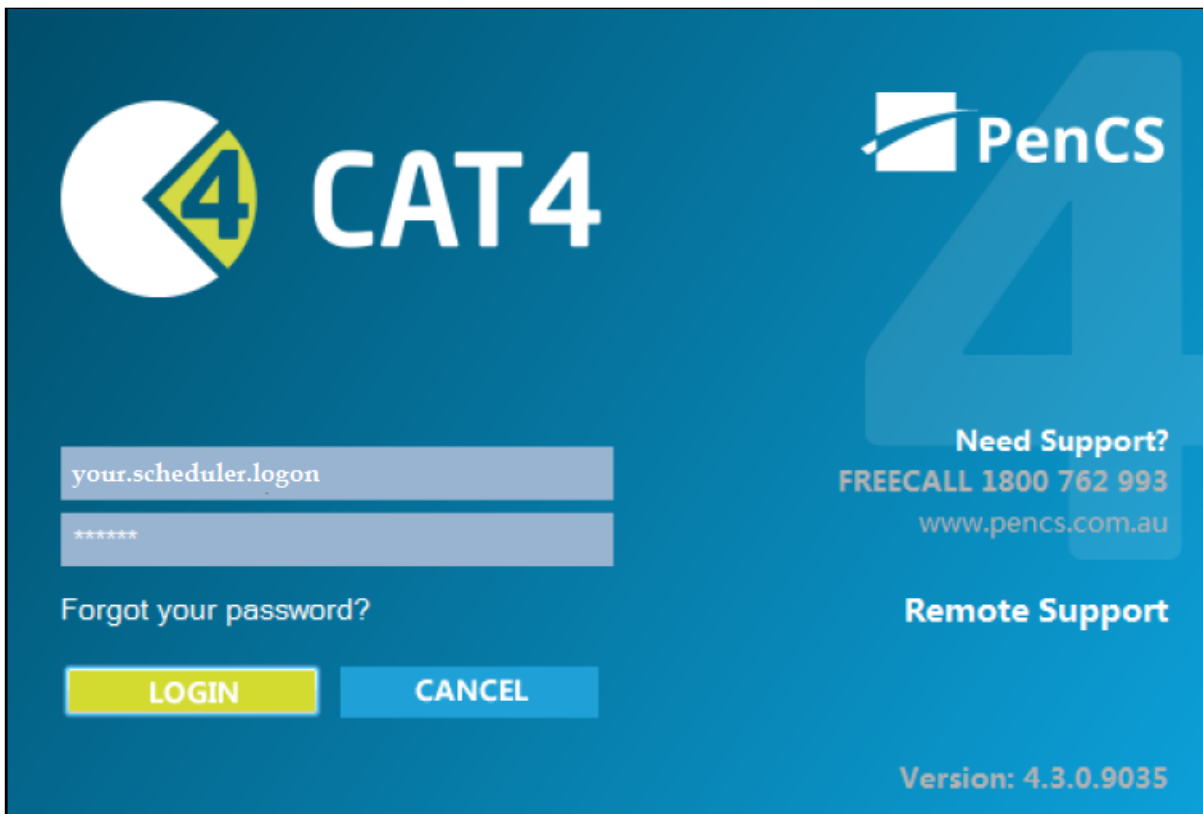


13.

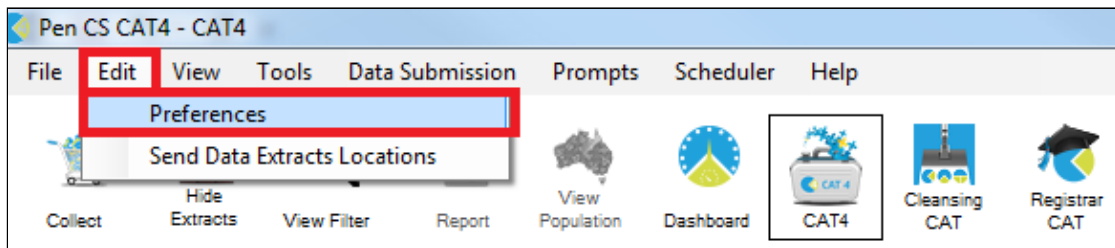
In this section you will be able to start CAT4, add the scheduler user name and password and validate your account.

- i** Before commencing you must obtain your scheduler account user name and scheduler account password from Pen CS Support on 1800 762 993. You will not be able to validate your scheduler account without this information.

Start CAT 4 from the desktop by double clicking the CAT4 icon to log in. Use the Scheduler specific credentials available through Pen CS Support.



14. Once logged into CAT 4, navigate to **Edit** menu and click **Preferences**.

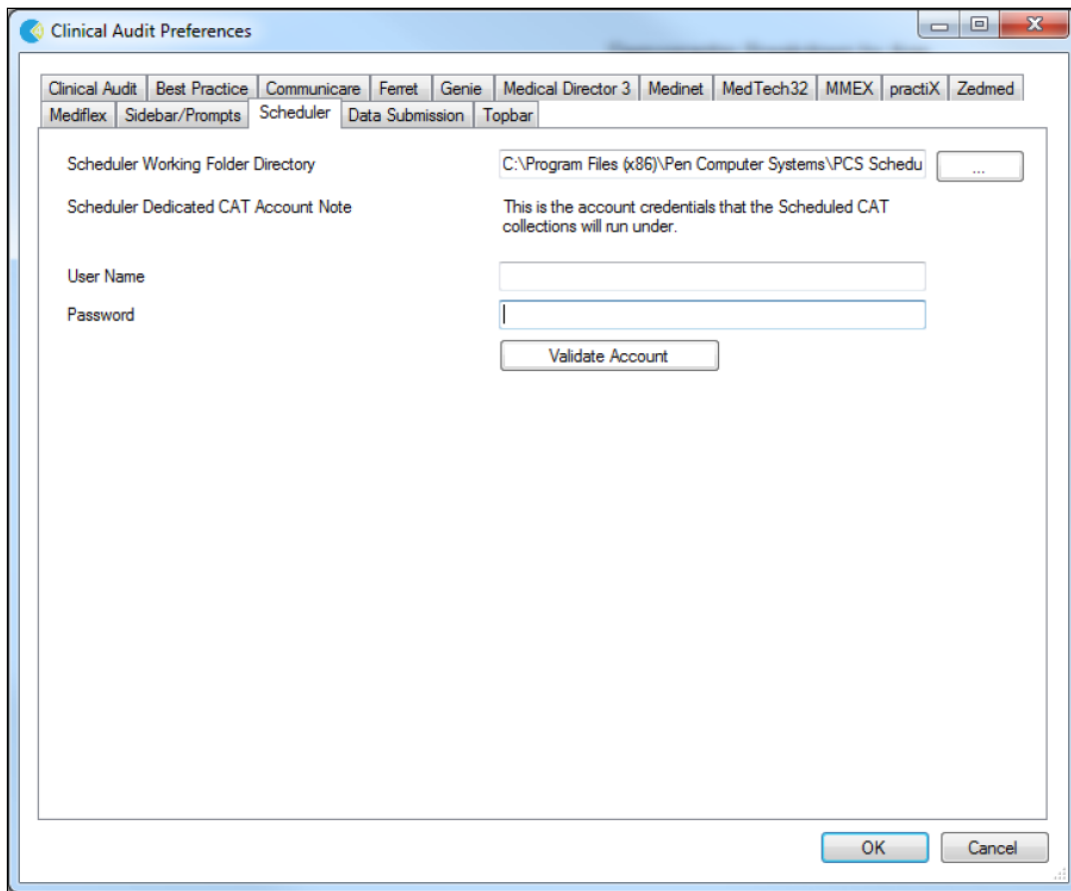


15. In *Clinical Audit Preferences* dialog box, navigate to **Scheduler** tab and fill in **User Name** and **Password** for the practice.

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

You will need to enter the new scheduler user name and scheduler password. Please contact PenCS Support on 1800 762 993 to obtain your scheduler username and scheduler password.

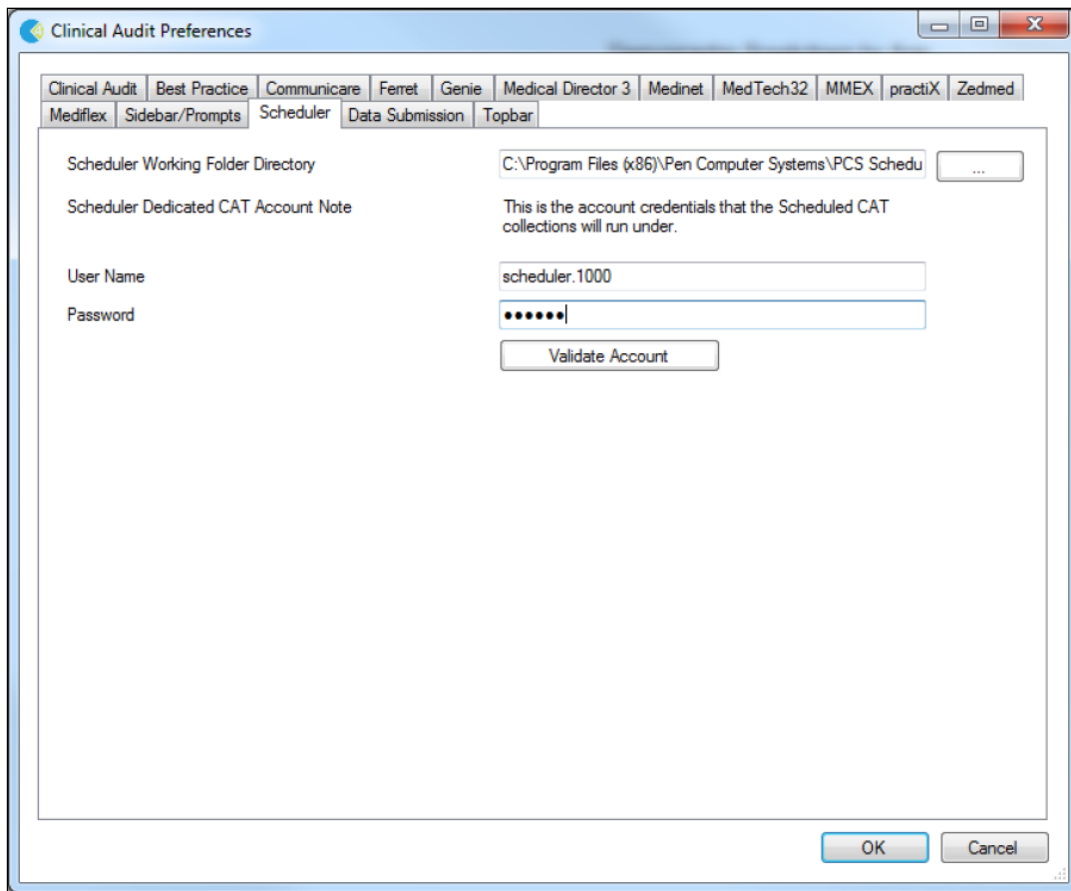
If the correct credentials are not entered you will not be able to validate your account successfully.



⚠ The scheduler username and password are not the same as your CAT4 username and CAT4 password.

16.

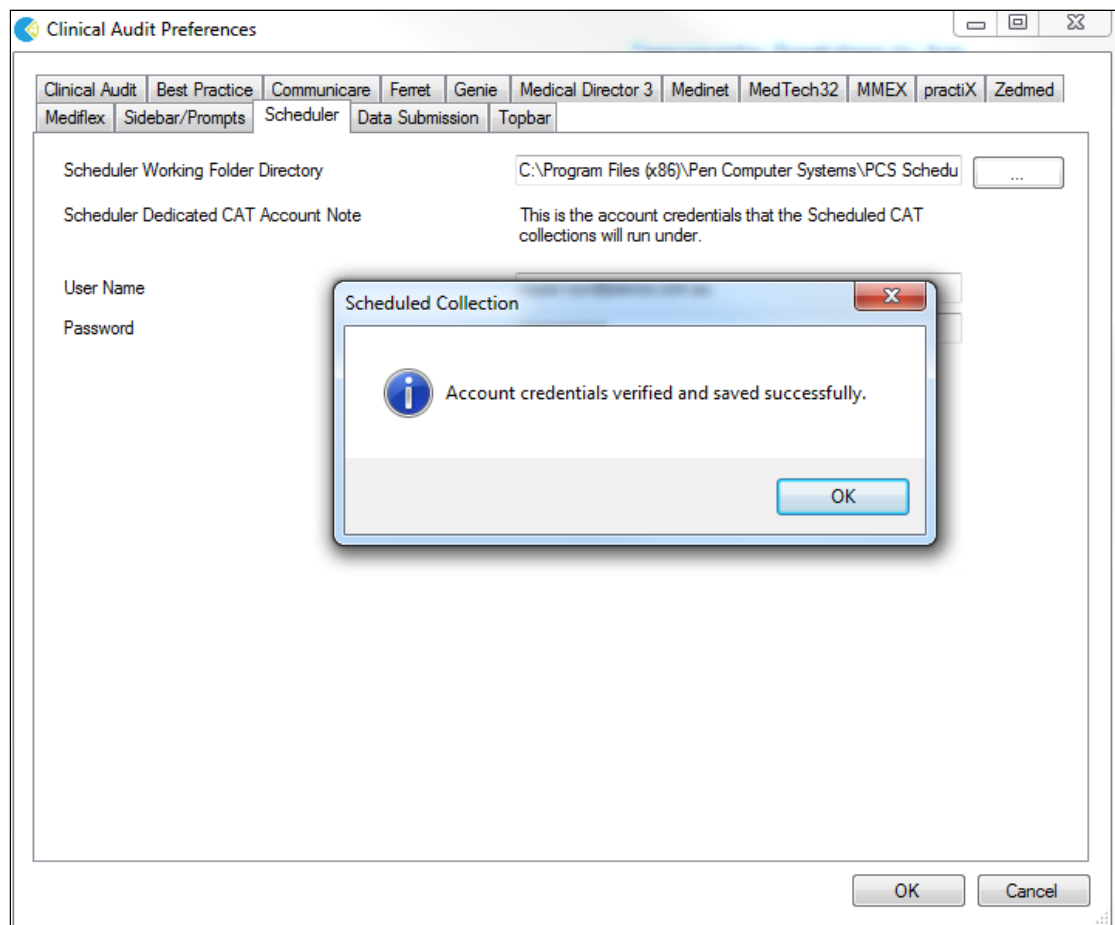
Once User Name and Password are filled in here, click the **Validate Account** button.



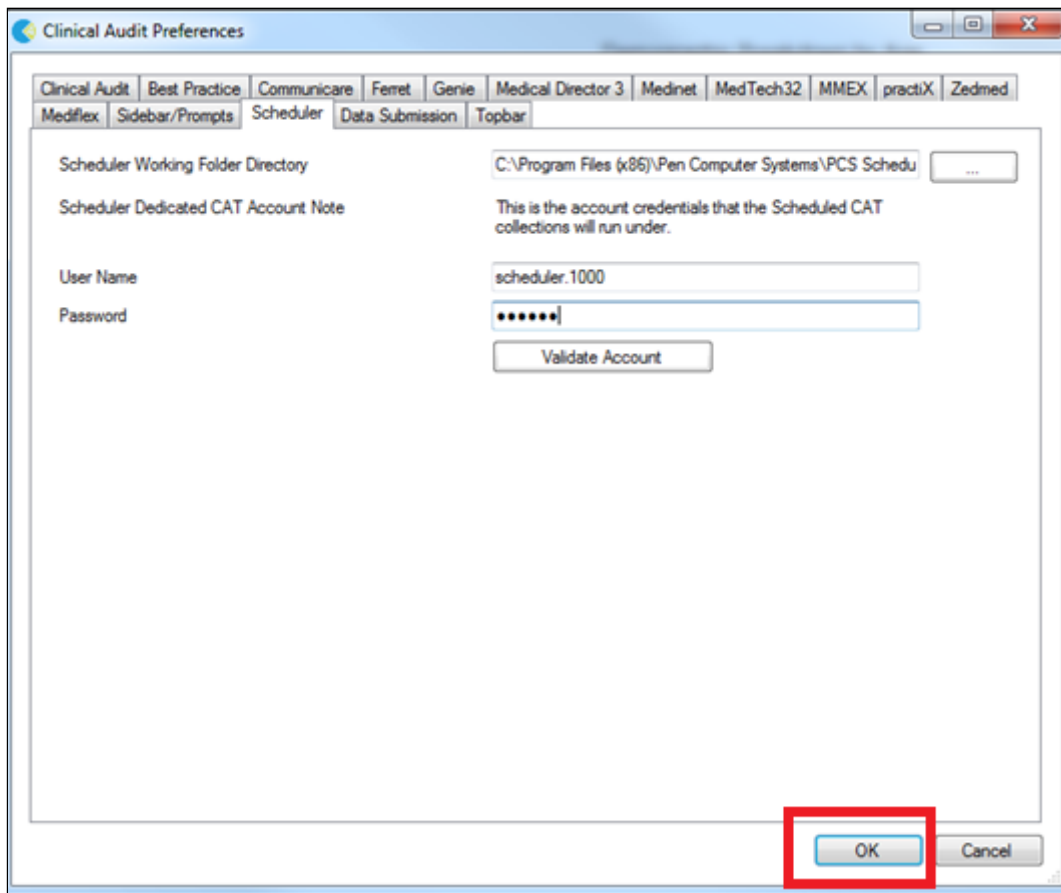
17.

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.



18.
Click **OK** for the *Clinical Audit Preferences* dialog box to close.

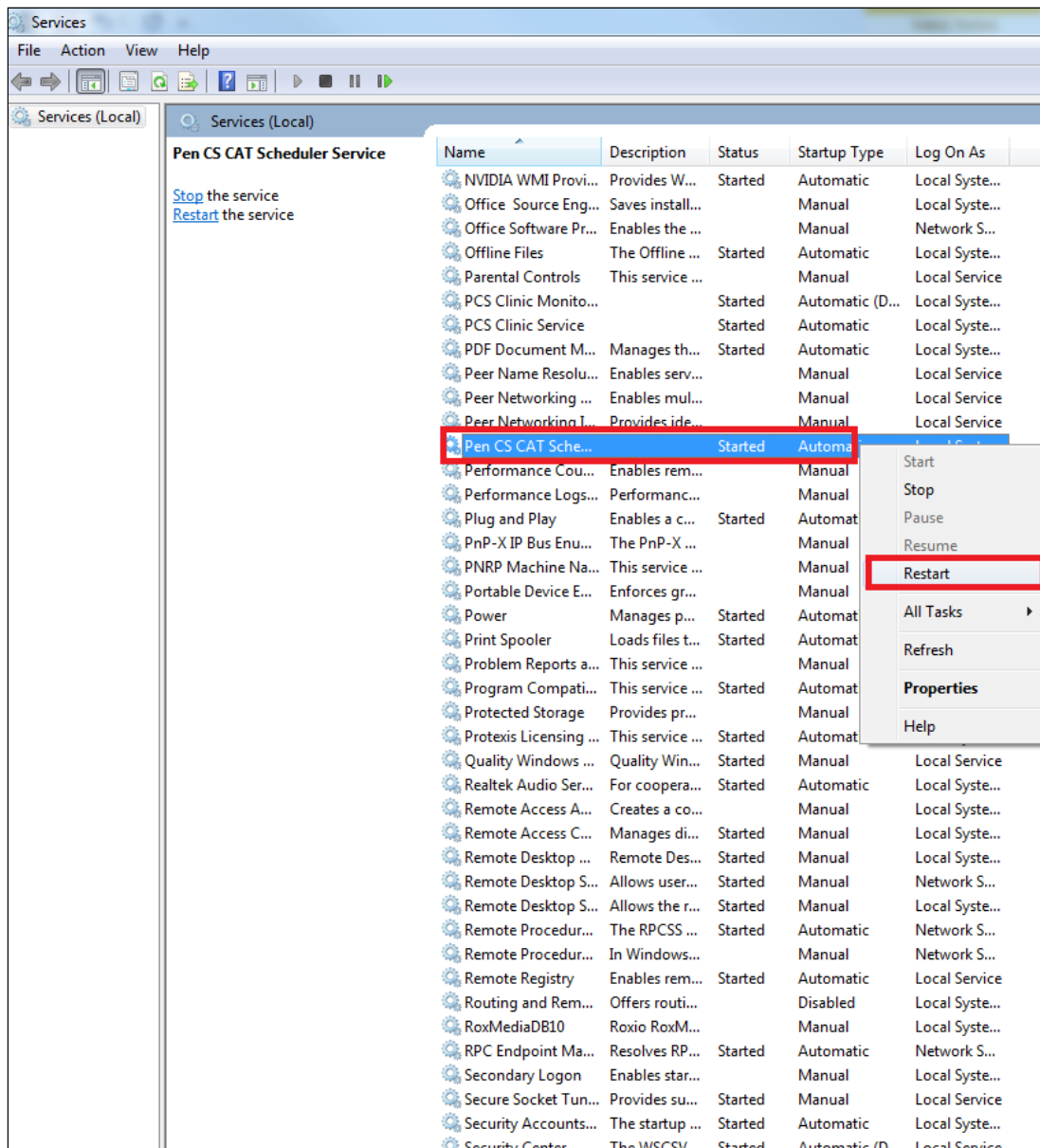


19.

Finally, restart **Pen CS CAT Scheduler** via **Control Panel, Administrative Tools, Services** to ensure all settings have been applied.



This step is important to ensure the scheduler is fully functional and configured!



This concludes the steps for installation and configuration of PEN CS Scheduler version 3.0 and above with CAT 4. Once this installation is completed, please set up Scheduled Tasks in Scheduler as per the detailed instructions in the [CAT4 Configuration Guide](#)³².

To be able to send data to PAT CAT, the 'send to' location needs to be configured as detailed [here](#)³³

For information only:

Location for log files:

1. CAT logs: C:\ProgramData\Pen CS\Log folder in case
2. Scheduler logs: C:\Program Files (x86)\Pen Computer Systems\PCS Scheduler Service\Pen Computer Systems\logs
3. Scheduler and CAT install logs: C:\Program Files (x86)\Pen Computer Systems\PCS Scheduler Service\install.log

³² <https://help.pencs.com.au/pages/viewpage.action?pageId=1479665>

³³ <https://help.pencs.com.au/display/CG/Setting+up+Send+Data+Locations>

4. Scheduler and CAT uninstall logs: C:\Program Files (x86)\Pen Computer Systems\PCS Scheduler Service\uninstall.log

4 Licensing Portal

4.1 Intended Audience

This document is intended for PHNs and other organisations which are providing licences for their users. The web portal provides the functionality to be able to manage these licences. The web portal can also be used by all users of the CAT Plus software – however individual users have limited access. As a practice user the portal allows password reset and changes to personal information and opting out of email communication. The details are explained in the [CAT User Guide](#).³⁴

4.2 Licensing Structure

The portal is designed using a hierarchical structure:

- the PHN or other organisation sits at the top level
- the practices are client organisations who belong to the PHN or other organisation
- the individual user who belongs to the PHN or to one or more practices

Licenses are inherited – the CAT Plus licence for a PHN is valid for all client organisations and users belonging to the respective organisations including those added later. Users can be administrators or standard users, the difference being that administrators can change the password for other users and can create new users at their organisation, whereas standard users can only change their own passwords. To restrict the use of CAT Plus to the licensed organisation we have implemented a lock down of the licence to the practice it was allocated to – this will be confirmed by the first successful data collection.

When users are assigned to more than one Organisation they do not get the sum total of licenses from all their Organisations, instead:

- Users must nominate the organisation they are logging in at after supplying their username and password in CAT
- Users will only get the licenses specific to that organisation (and their User account level licenses)

4.3 Users at multiple organisations

With the latest update to our licensing portal users can now be allocated to more than one organisation. This could be a clinician working at several clinics and using different software at each clinic or any other combination of users and organisations. Administrator rights and job roles are by organisation only – a user can be an administrator in one clinic but a basic user in another. Only Pen CS support can add a user to an additional organisation – please contact support if this is required.

4.4 Licence lockdown

Any user logging on to CAT4 who is a member of multiple organisations will be asked on logon which organisation she/he is logging on to. On the first data collection CAT4 will lock this user to the clinical system used at the first instance. This will be reflected in the licensing portal under the organisation details as 'verified'. Once a licence has been linked to a particular clinical system at a particular clinic, this licence cannot be used at another location. This will prevent breaches of privacy by users who have left a clinic but are still using the same logon and it will protect

³⁴ <http://help.pencs.com.au/display/CG>

abuse of the PHN licences outside their catchment and designated clinics.

4.5 Quick Steps for PHN Users

For experienced users and as a quick reference this chapter lists some common tasks in dot point form. Full details can be found in the remainder of this guide and you can click on the hyperlinks to access the relevant chapter.

4.5.1 Creating a new user for your PHN

- Log on as admin user
- Select your organisation from the 'This User's Organisation' link on the top left
- Click on 'Add new User' and fill in the details on the next screen, then click save

4.5.2 Creating a new client organisation

This will need to be done for all practices not already listed as client organisations for your PHN

- Log on as admin user
- Select your organisation from the 'This User's Organisation' link on the top left
- Click on the 'Client Organisations' tab
- Click on 'Add new client organisation' and fill in the details on the next screen, then click 'Save'

4.5.3 Creating a new user for a client organisation

After creating a new client organisation you need to create the users at that organisation. For existing client organisations you might have to add new users.

- Log on as admin user
- Select your organisation from the 'This User's Organisation' link on the top left
- Click on the 'Client Organisations' tab
- Select the practice you want to add users by clicking on the practice name
- Click on 'Add new User' and fill in the details on the next screen, then click save

4.5.4 Changing user preferences or password

- Log on as admin user
- Select your organisation from the 'This User's Organisation' link on the top left

- For PHN users: Click on the user you want to change to display the user details, then on the 'Organisations' tab
- For practice level users: Click on the 'client organisations' tab to select a client organisation, then on the practice to display the practice level users and then on the user you want to change, then on the 'Organisations' tab
- Change notification options and/or administrator access
- Click on the 'Password' tab to change the password by entering a new password

4.5.5 Removing a user

- Log on as admin user
- Select your organisation from the 'This User's Organisation' link on the top left
- For PHN users: Click on the user you want to change to display the user details, then on the 'Organisations' tab
- For practice level users: Click on the client organisations tab to select a client organisation, then on the practice to display the practice level users and then on the user you want to change, then on the 'Organisations' tab
- Click on 'Remove'³⁵ on the bottom right for the organisation you want to remove the user

4.5.6 Creating a list of all current users

- Log on to the portal – no admin access required
- Select your organisation from the 'This User's Organisation' link on the top left
- Click on the 'Export List to file (including Users at all client organisations)' button

Export list to file (including Users at all client Organisations)

- The report will download as a comma delimited file (.csv) and can be opened and edited with MS Excel or other programs

4.6 Using the Portal

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

Use the provided details and click on 'Log In'³⁶

³⁵ http://help-beta.pencs.com.au/pages/createpage.action?spaceKey=CP&title=_Removing_Users&linkCreation=true&fromPageId=1477112

³⁶ <https://users.pencs.com.au/admin/>

MyPEN

Sign In

User Name:

Password:

Log In

[Create new account](#)
[Account recovery/password reset](#)

MyPEN

[Support](#) . [PEN CS Website](#) . [Privacy Policy](#)

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Figure 1: CAT Plus Portal Sign In Page³⁷

The login page offers two additional links, [Create New Account](#) and [Account recovery/password reset](#). Please check the chapter on [self-registration](#) (see page 76) for details on creating a new account. Account recovery and password reset allows any registered user with a valid email address to reset their password. Entering username OR email address of an active account will trigger an email with a new password to be sent to the email associated with the username. We strongly encourage all users to provide an email address to enable this simple option to reset their passwords.

³⁷ <https://users.pencs.com.au/admin/>

4.6.1 Organisation Level

The organisation level screen has more tabs displaying information which will be explained in this chapter. The portal is organised as a hierarchy – your organisation's users will be shown under 'Users' and client organisations which are the practices will be listed under 'Client Organisations'. Practices in turn have their own users. Pen CS has transferred existing accounts to the new organisations created but admin users can add new practices and users as required.

To see all users at your organisation click on the '[This User's Organisation](#)' link on the top left. This will show a list of all organisations the users belongs to and the organisation of interest can be select by clicking on its name. In the example below the user is a member of one organisation called 'Licensing Portal Organisation'.

The screenshot shows the MyPEN user profile page. At the top, there is a navigation bar with the MyPEN logo, 'My Orgs', 'Search Users', and 'Search Orgs'. A blue header bar contains a 'You' button. Below this, a red box highlights the 'This User's Organisations' link. Underneath, a list shows 'Licensing Portal Organisation' selected. The user details form includes:

- Username: org.user
- Title: Mr (dropdown menu)
- First name: Org *
- Surname: User *
- Email: orguser@org.com.au *
- Phone: 1800 762 993 *

At the bottom, there are checkboxes for 'Send email with':

- New product updates
- Product and marketing information

Figure 7: MyPen User's Organisation Link

After clicking on the organisation of interest, the organisation screen will load.

4.6.1.1 Users

On the 'Users' tab all users for the organisation are listed with their job role, permission level and status (active/not active). The users displayed under your organisation should be staff working with you in the same organisation. Users can have administrator access or basic access, this is determined when creating new users and is displayed in the 'Permissions' column. Users with admin rights will be able to create new client organisations, new users and to change other users' passwords and search for other users. You can see the users' status under 'Permission Level'. This screen also shows if the user has self-registered for a product. Please refer to the chapter on self-registration (see page 65) for more details.

MyPEN My Orgs QSearch Users QSearch Orgs org user Logout

Organisation - Licensing Portal Organisation

Organisation Name: Licensing Portal Organisation *
 Cross Reference Number: ref number
 Street Address: Street Address *
 Suburb: Suburb *
 State: New South Wales *
 Postcode: 2000 *
 Phone: 1800 762 993 *
 Fax: fax
 Clinical Software: Best Practice * Not verified
 Billing/Appointment Software: Pracsoft * Not verified

[Save changes](#)

[Users](#) | [Client Organisations](#) | [Membership and Licensing](#) | [Credit](#) | [Login/Usage Reports](#)

This is the list of all User accounts associated with this Organisation. User accounts may also have associations with other Organisations. Users details and their association with this Organisation can be changed on the Users account page, accessible via following the links below. New accounts can be created via the Add new User button visible to Organisation Administrators and PenCS Support.

[Add new User](#) | [Export list to file \(including Users at all client Organisations\)](#) Count: 2

Name (Username)	Job Role	Permission	Self-Reg Status	Active
More Users (more.org.users)	Software Vendor	Basic	N/A	Yes
Org User (org.user) You	PHN Staff	Administrator	N/A	Yes

Figure 8: Organisation Level Logon Screen

This tab allows new users to be created (please see next chapter (see page 65)) and to export a list of all current users and their organisations by using the button 'Export list to file'.

[Users](#) | [Client Organisations](#) | [Membership and Licensing](#) | [Credit](#) | [Login/Usage Reports](#)

This is the list of all User accounts associated with this Organisation. User accounts may also have associations with other Organisations. Users details and their association with this Organisation can be changed on the Users account page, accessible via following the links below. New accounts can be created via the Add new User button visible to Organisation Administrators and PenCS Support.

[Add new User](#) | [Export list to file \(including Users at all client Organisations\)](#) Count: 2

Figure 14: Export User List

4.6.1.2 Client Organisations

On the 'Client Organisations' tab your existing client organisations are displayed and you can create new organisations. For PHNs or other organisations this screen will show the practices licenced to use CAT Plus.

You need to be administrator to be able to create new client organisations.

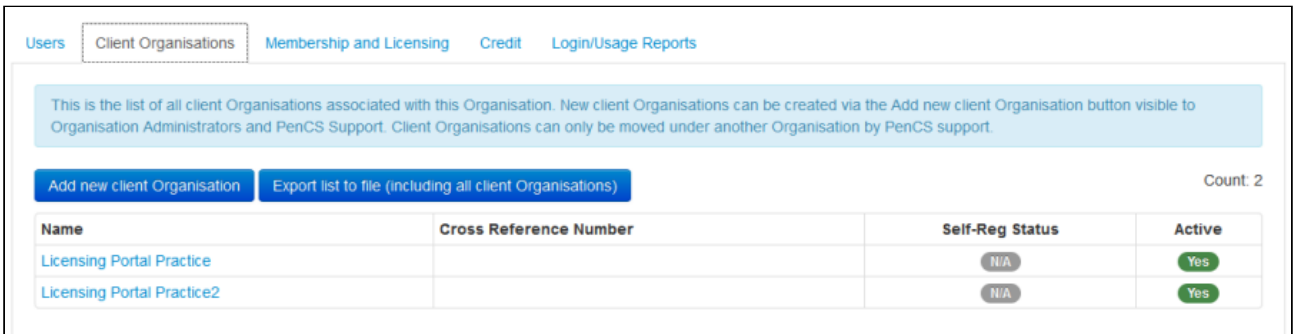


Figure 9: Client Organisation Tab

Clicking on the 'Add new client Organisation' link will open a new window to enter the details of the new organisation. All fields with the red * are mandatory. The clinical and billing software has to be entered but will be verified on the first logon of users from the organisation against the settings in CAT4. The label 'not verified' will change to 'Confirmed' once this has happened.

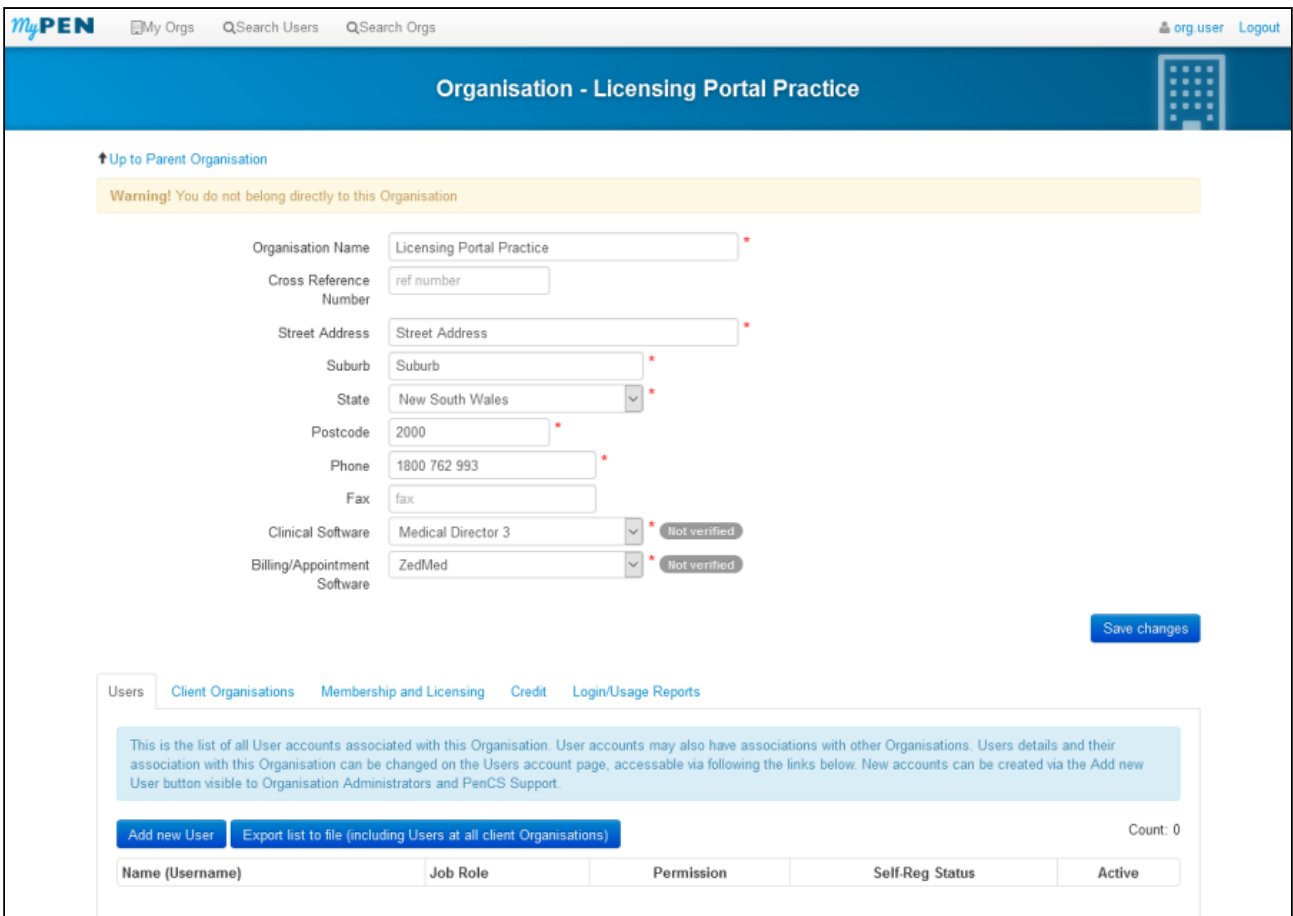


Figure 10: Creating Client Organisations

After creating a new client organisation you have to create the new users for the newly created organisation(see page 73).

4.6.1.3 Membership and Licensing for Organisations

The 'Membership and Licensing' tab will allow you to see your current licence details. As explained above these licences will apply to all client organisations and their respective users. Licences and their expiry dates are assigned by PEN CS and cannot be changed by the users.

Product	Expiry
CAT Plus	30/06/2016

Component	Expiry

Figure 11: Membership and Licensing

4.6.1.4 Credit


The 'Credit' tab is currently only used internally by PEN CS for a project. If this functionality becomes available for other users this manual will be updated.

Figure 12: Credit

4.6.1.5 Login Usage Reports

The portal gives users access to a number of reports – covering user details as well as usage and login counts. The field 'Cross Reference Number' can be used to identify practices by a code defined by your organisation and will show on all reports.

These reports show login history and counts beginning 13/10/2014 for the current organisation and its client organisations. Counts shown for a specific organisation are for logins by users at that organisation only: counts do not include logins by users at client organisations (unless otherwise stated). Login counts do not include logins to Sidebar, Scheduler Installer and some very old versions of other applications. Only successful logins with correct username and Password are counted. All date/times are UTC (effectively GMT), not local time as local time varies across Australia. Specifying a date range is optional: you may leave out either the lower or upper bounds or both.

 Please note that the time reported in the logs is UTC which is 10 hours behind AEST but varies across the different time zones throughout Australia

Users Client Organisations Membership and Licensing Credit **Login/Usage Reports**

Application login history
History of all application logins at this Organisation and client Organisations.

From: To: [Export to File](#)

Application login counts by User
Application login counts for each User at this Organisation and each client Organisation

From: To: [Export to File](#)

Application login counts by Organisation
Application login counts for this Organisation and each client Organisation

From: To: [Export to File](#)

Application login counts sum total
Sum total application login counts aggregated from this Organisation and all client Organisations.

From: To: [Export to File](#)

Application login distinct User counts by Organisation
Application login count of the number of individual Users at this Organisation and each client Organisation.

From: To: [Export to File](#)

Application login distinct Users count sum total
Sum total application login count of the number of individual Users aggregated from this Organisation and all client Organisations.

From: To: [Export to File](#)

Legacy Login and Usage

Provided only for historical purposes, this report contains data from prior to 13/10/2014. Logins to PenCS applications are no longer written to this report. The reports above are more comprehensive, fully recursive (go right down the Organisation hierarchy) and give application specific login statistics. Use those for all statistics starting 13/10/2014.

Usage Count Aggregated
Figures include logins for all Pen applications. Only this and immediate child Organisations are included in these statistics.

From: To: [Export to File](#)

Figure 15: Reports

All reports are exported in comma delimited format and can be opened in MS Excel or other spreadsheet software for further analysis.

Each report, unless listed otherwise below, contains the following details of the application used, the user and associated organisation:

<ul style="list-style-type: none"> • ApplicationName • Title • Surname • Firstname • Username • Phone • EmailAddress 	<ul style="list-style-type: none"> • OrganisationName • CrossReferenceNumber • StreetAddress • Suburb • Postcode • State • Phone • Fax
---	--

Application login history report

This report provides a history of all application logins for the organisation selected and the date range entered. In addition to the user and organisation information detailed above it will list the following information:

- IPAddress – IP address of the computer used to log on
- OccurredUtc – the time of logon in Coordinated Universal Time

Application login counts by User

This report provides a count of all application logins for each user at this organisation and each client organisation. In addition to the user and organisation information detailed above it will list the following information:

- ApplicationName – application used
- LoginCount – count of successful logins

Application login counts by Organisation

This report provides a count of all application logins counts by organisation. No individual user login counts are listed. Topbar, CAT4 and PATCAT are all listed by name, scheduled collects are listed separately.

Application login counts sum total

This reports provides a total count of successful logins by application for the organisation selected. This can be used for an overall report on the PHN or other top level organisation or for a client organisation such as a practice to see the overall number of logins by application.

Application login distinct User counts by Organisation

This report provides a count of distinct users by organisation and application over the selected time period.

Application login distinct User counts sum total

This report shows a sum of distinct users by application in the selected time period for the organisation

4.6.2 User Level

Once you have successfully signed in you will see your home page. The portal allows to configure licences for users belonging to more than one organisation – to see the licence details the organisation needs to be selected by using the drop down box as highlighted below.

The screenshot shows the MyPEN user profile page for 'Mr Org User'. The page includes a navigation bar with 'My Orgs', 'Search Users', and 'Search Orgs'. The user's profile details are as follows:

- Username:** org.user
- Title:** Mr
- First name:** Org
- Surname:** User
- Email:** orguser@org.com.au
- Phone:** 1800 762 993

Under 'Send email with', the following options are checked:

- New product updates
- Product and marketing information

A 'Save Changes' button is located at the bottom right of the profile section.

The 'Membership and Licensing' section is active, showing tabs for 'Organisations' and 'Password'. A blue informational box states: 'Only currently active/valid licenses for the User are shown on this page: licenses yet to come into effect or that have expired are not shown. Product expiry dates shown do not take into consideration the Products master expiry date set on the Product itself.'

The 'Organisation logging in at:' dropdown menu is open, showing the following options:

- none selected -
- none selected -
- Licensing Portal Organisation (8069) <- PEN CS Pty Ltd

Below this, there are sections for 'Organisation Component Licenses:', 'Legacy User Product Licenses:', and 'Legacy User Component Licenses:'. The 'Legacy User Product Licenses:' section contains a table with columns 'Product' and 'Expiry'. The 'Legacy User Component Licenses:' section contains a table with columns 'Component' and 'Expiry'.

Figure 2: MyPen User Homepage

To see your organisation click on the link 'This User's Organisation' in the top left corner – this will display all organisations the logged on user belongs to. A click on the organisation of interest will load a new page, please see the chapter on Organisation Level for details.

This Users's Organisations

Licensing Portal Organisation

Username: org.user

Title: Mr

First name: Org *

Surname: User *

Email: orguser@org.com.au *

Phone: 1800 762 993 *

Send email with ? New product updates Product and marketing information

Figure 3: MyPen User Organisations

4.6.2.1 Membership and Licensing for Users

Once the organisation is selected, the licensing details will be displayed:

Membership and Licensing Organisations Password

Only currently active/valid licenses for the User are shown on this page: licenses yet to come into effect or that have expired are not shown. Product expiry dates shown do not take into consideration the Products master expiry date set on the Product itself.

Organisation logging in at: Licensing Portal Organisation (8069) <- PEN CS Pty Ltd

Organisation Product Licenses:
from Licensing Portal Organisation

Product	Expiry
CAT Plus	30/06/2016

Organisation Component Licenses:

Component	Expiry

Legacy User Product Licenses:

Product	Expiry

Legacy User Component Licenses:

Figure 4: MyPen User Licensing Information

4.6.2.2 Organisations

The 'Organisations' tab shows all organisations the user is part of and also displays the permissions and roles at each organisation. Organisation membership can be added or removed by Pen CS support staff. A user can be a member of multiple organisations. As well as membership a user can be designated as an administrator on a per organisation basis and also assigned a different job role.

Users can view all of the organisations that they are members of, but can only alter membership for organisations that they are administrators of. When an organisation administrator views the membership of another user at their organisation they can only see/edit the user's membership at that organisation, not any of the user's memberships with other organisations.

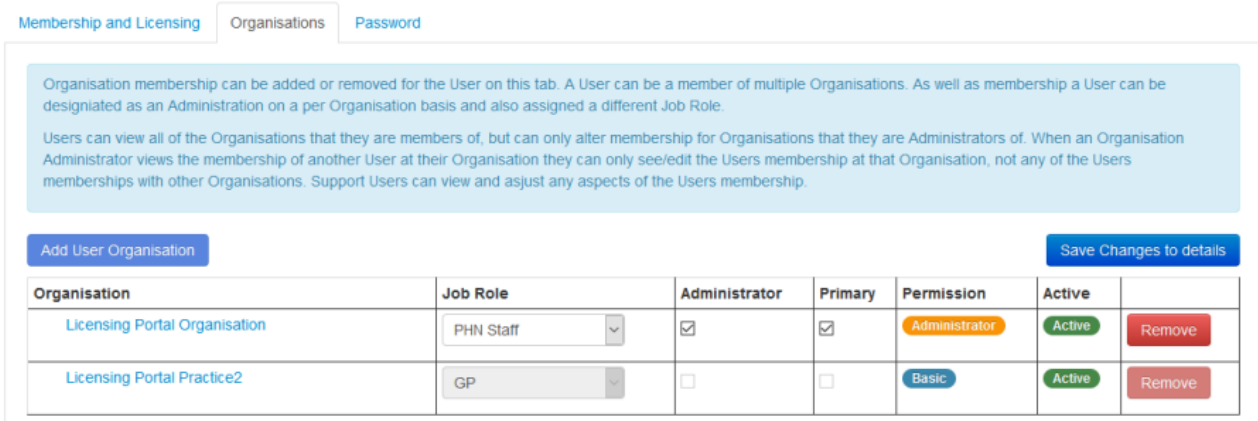


Figure 5: MyPen User Organisations Tab

4.6.2.3 Password

On the password tab users (administrator and basic) can change their own password. Administrator users can change the password of other users but only for the organisation where they are administrators. The new password needs to be typed in both boxes, then the 'Change Password' button will save the new password.



Figure 6: MyPen User Password

4.7 Managing Users

Adding New Users(see page 73)

Changing User Preferences and Access Level(see page 74)

Removing Users(see page 75)

Changing Passwords(see page 75)

4.7.1 Adding New Users

Admin users can create new user accounts by clicking on the 'Add new User' button on the 'Users' tab. The new user screen will be displayed – please fill in all details and click 'OK' when done. New users automatically inherit the organisation licenses.

You need to be administrator to be able to create new users.

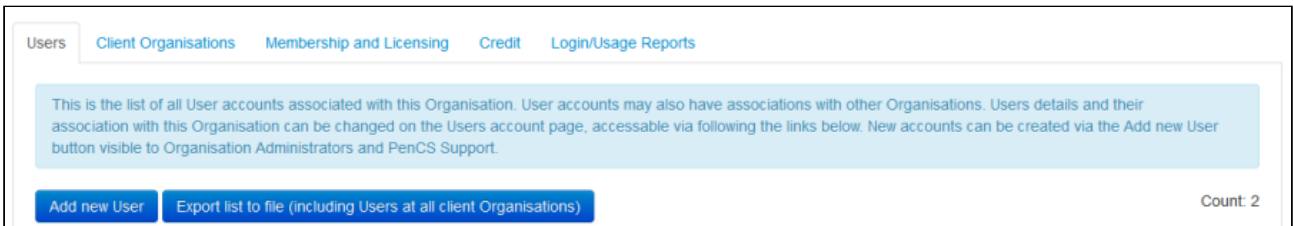


Figure 16: User Options

The 'Users' tab also allows to export all users listed on the tab and users in client organisations to a comma delimited file (.csv) which can be opened in MS Excel or other programs. All fields with the red * are mandatory – a valid email address is required for the automatic reset password function of CAT Plus.

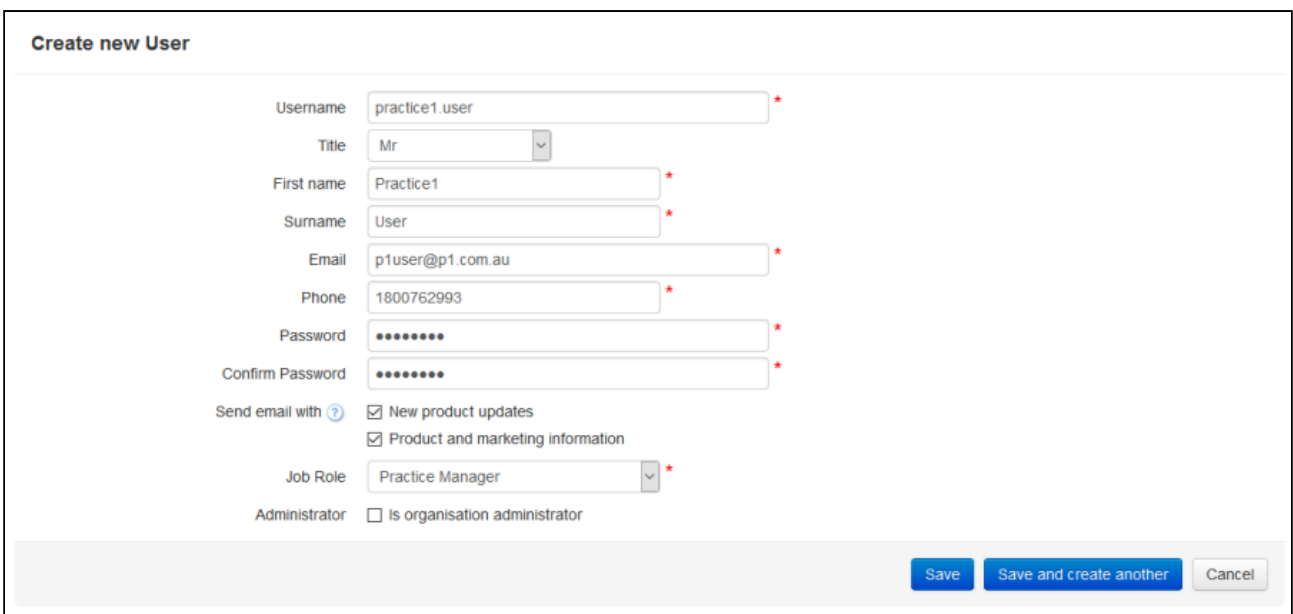


Figure 17: Create New User

Once done you can either save and exit this screen or choose the 'Save and create another' to remain on this screen. You can also choose if the new user will receive product updates and/or marketing information by ticking the relevant boxes and choose to give administrator rights to the new user. When creating new users for a client organisation such as a practice you can give one or more of the users at the practice level admin rights, so they can manage their own users, in particular to reset passwords.

4.7.2 Changing User Preferences and Access Level

An administrator user can change the preferences of other users and can also give administrator access to other users. This is done by clicking on the user's name to open the user details screen and then on the 'Organisations' tab to allow to change the access level. For users with more than one organisations only one can be the primary organisation.

This User's Organisations

Username:

Title:

First name: *

Surname: *

Email: *

Phone: *

Send email with New product updates

Product and marketing information

[Save Changes](#)

Membership and Licensing **Organisations** Password

Organisation membership can be added or removed for the User on this tab. A User can be a member of multiple Organisations. As well as membership a User can be designated as an Administrator on a per Organisation basis and also assigned a different Job Role.

Users can view all of the Organisations that they are members of, but can only alter membership for Organisations that they are Administrators of. When an Organisation Administrator views the membership of another User at their Organisation they can only see/edit the Users membership at that Organisation, not any of the Users memberships with other Organisations. Support Users can view and adjust any aspects of the Users membership.

[Add User Organisation](#) [Save Changes to details](#)

Organisation	Job Role	Administrator	Primary	Permission	Active	
Licensing Portal Organisation	PHN Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Administrator	Active	Remove
Licensing Portal Practice2	GP	<input type="checkbox"/>	<input type="checkbox"/>	Basic	Active	Remove

Figure 18: Change User Preferences

4.7.3 Removing Users

Users with admin rights can remove other users from the organisation where they have admin rights. Clicking on the username will bring up the user details, then clicking on 'Organisations' will show the users current access level and job role. To remove a user from this organisation click the 'Remove' button on the right – this will remove the user from the respective organisation. Removed users can be brought back by Pen CS support and their logons will still be counted in the usage reports even if they are not visible in the licensing portal any more.

4.7.4 Changing Passwords

Users can change their own passwords by logging on to the portal and clicking on the password tab. Admin users can change the passwords of their own or other users by doing the same. This function is available to ML users as well as practice users.

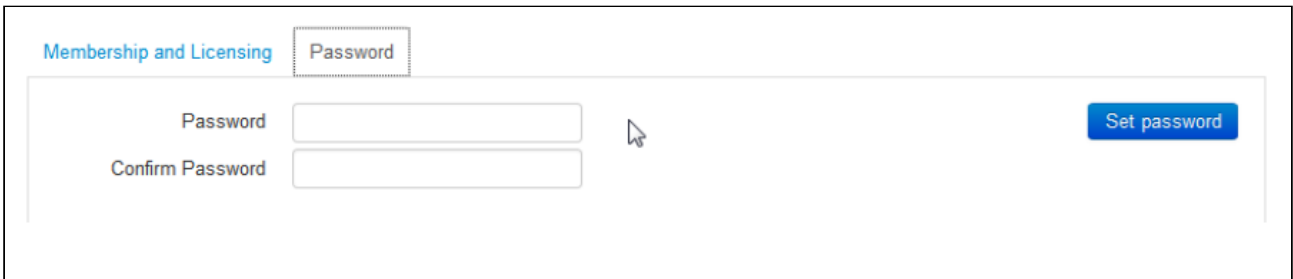


Figure 19: Changing Password screen

Passwords are stored hashed and neither PHN staff nor PEN CS staff can retrieve user passwords, they can only be reset.

4.8 Self Registration

Users can self-register at the logon page by clicking on the link 'Create new account' on the logon page.



Figure 20: Create New Account Link

This will open a new window where you are prompted to enter our personal and organisational information. A MyPEN account will be created automatically for you if you complete the form. This account will have to be confirmed by our support team to confirm your organisation details before your account becomes fully activated. Before this time, you will be able to log in and update your personal details at any time, but will not have access to any PEN products. Our support team will fully activate your account within 2 business days.

Register new MyPEN account

Please provide your personal and organisation details. A MyPEN account will be created automatically for you, however, our support team will need to confirm your Organisation details before your account becomes fully activated. Before this time, you will be able to log in and update your personal details at any time, but will not have access to any PEN products. Our support team will fully activate your account within 2 business days.

Username *

Title ▾

First name *

Surname *

Email *

Phone *

Password *

Confirm Password *

Send email with New product updates

Product and marketing information

Job Role ▾ *

Organisation Details

Organisation Name *

Cross Reference Number

Street Address *

Suburb *

State ▾ *

Postcode *

Phone *

Fax

Clinical Software ▾ * Not verified

Billing/Appointment Software ▾ * Not verified

Figure 21: Self Registration Form

After completion the account will be displayed with the status as 'Awaiting Approval'.

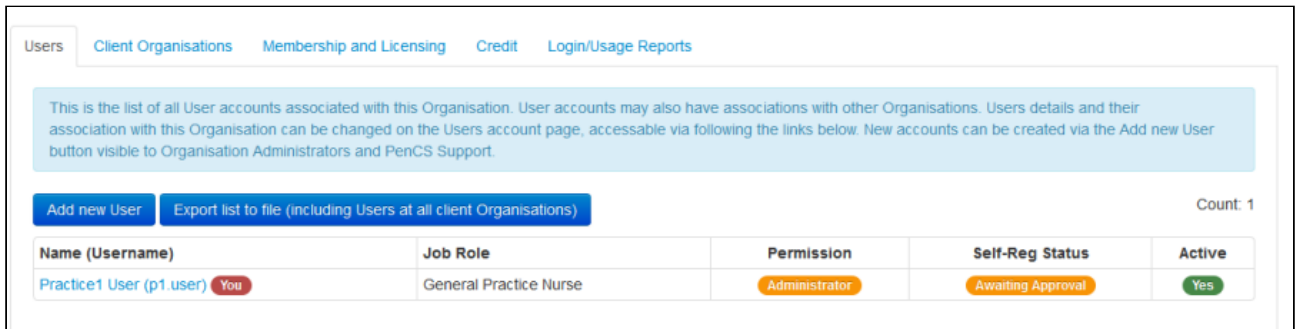
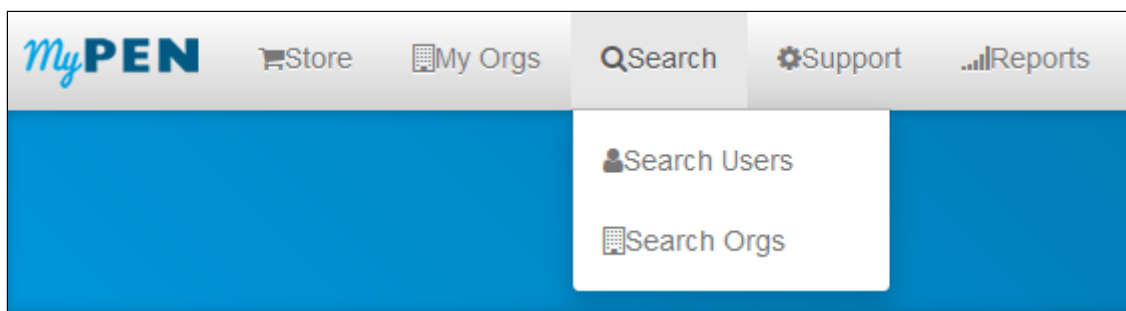


Figure 22: Self Registered Account Status

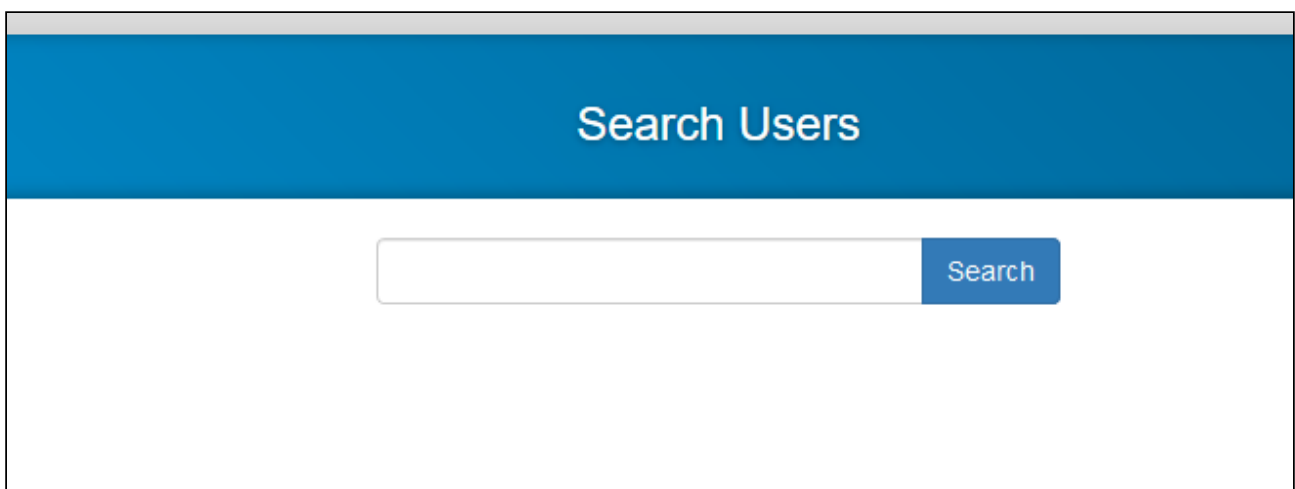
4.9 Search Functions

Search Users

The top of the screen has a number of additional functions – searching for users being one of them. *Only admin users can search for other users.* To search, click on the 'Search Users' link on the top of your screen:

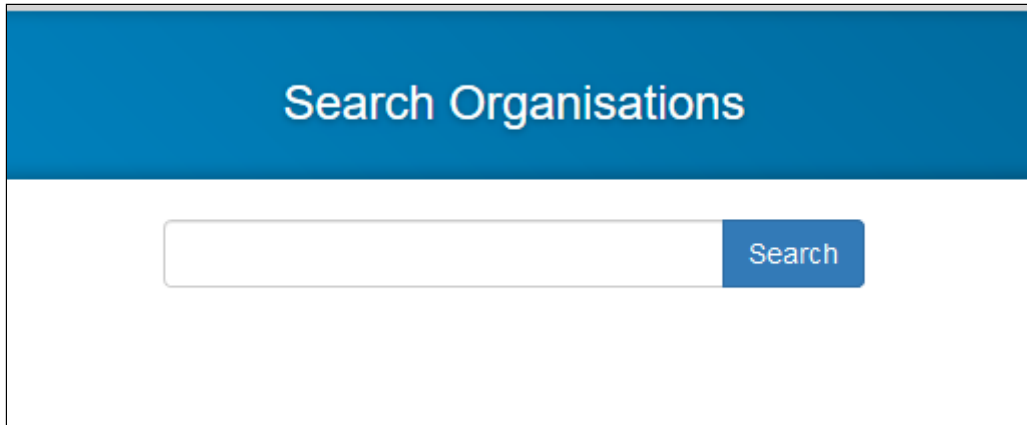


This will search your organisation's registered users and display them grouped by client organisation:



Search Organisations

A list of all organisations in alphabetical order can be found under the 'Client Organisations' tab, but if you need to search for an organisation by name you can use the 'Search Organisations' tab from the top of your screen. The search will show all organisations matching what you have entered in the search box.




The image shows a screenshot of a web interface for searching organisations. At the top, there is a blue header bar with the text "Search Organisations" in white. Below the header, there is a white search box with a blue "Search" button on the right side.

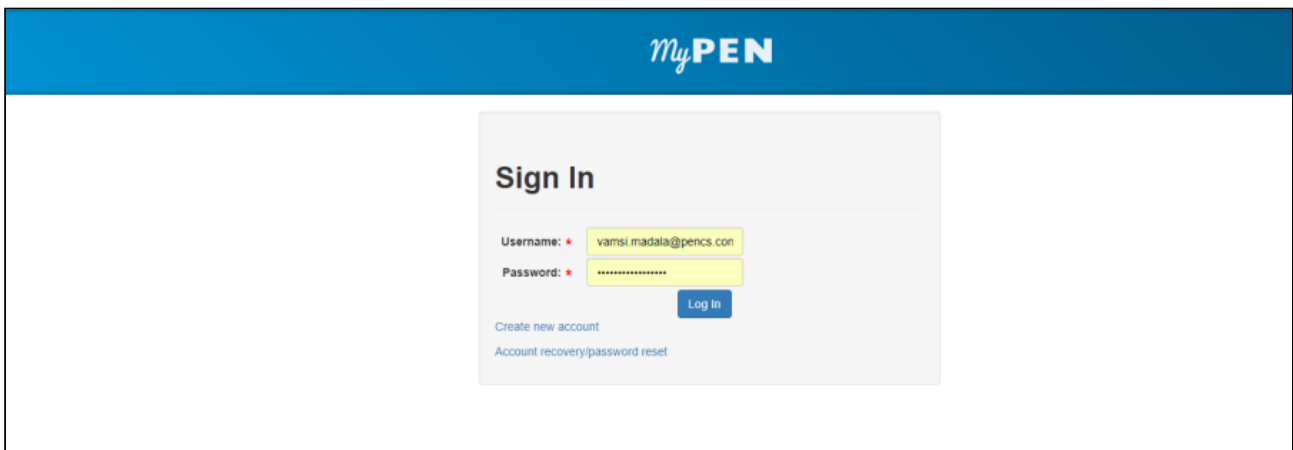
4.10 Scheduler Management Console

The Scheduler Management Console allows you to remotely schedule a data collection and upload for one or more practices in your catchment. At the moment, we have two different types of schedules that we can create on MyPEN.

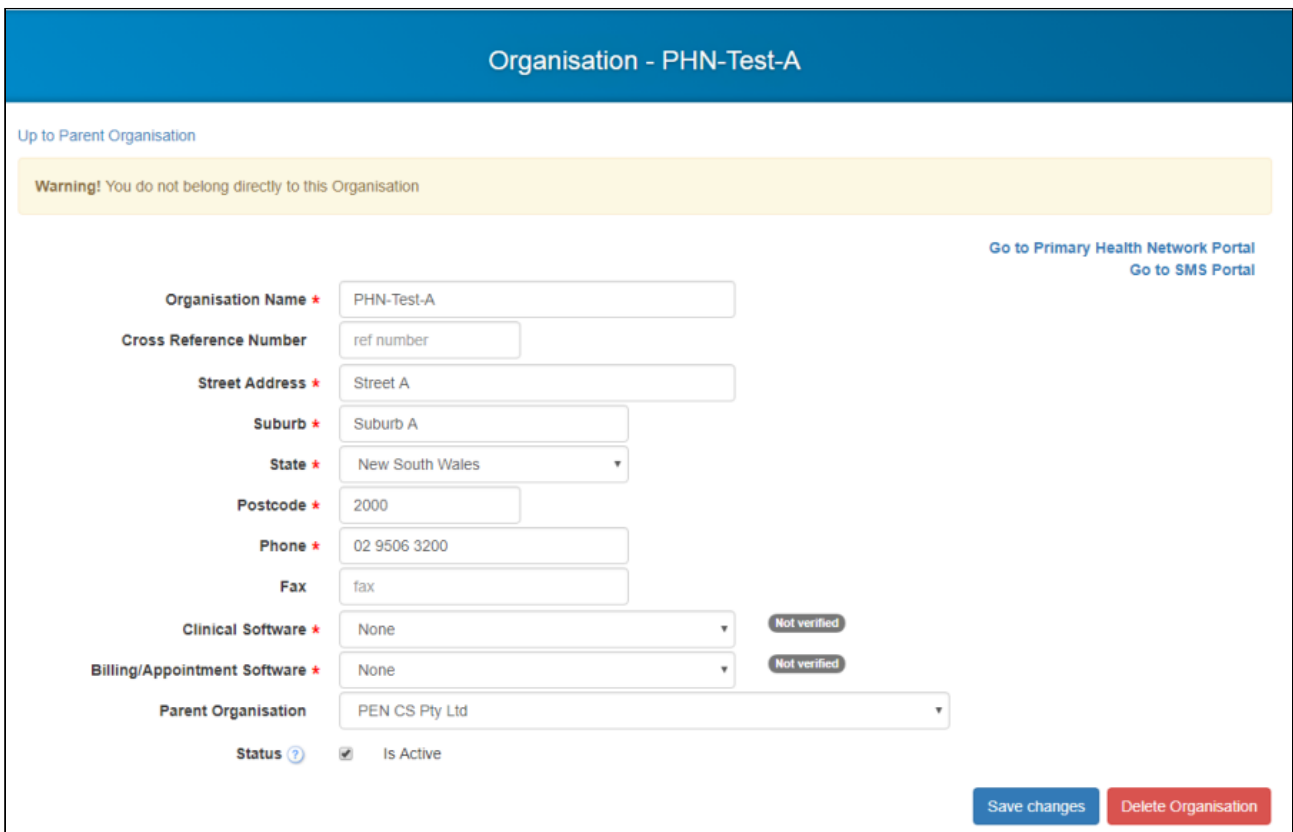
- Bulk Configuration - for PHN staff
- Practice Level Schedule - for PEN CS support

Bulk Configuration is for one or more practices at a time where as Practice Level Schedule is created when Scheduler is installed by PEN CS support staff. Please note that the practice level schedule is not visible in the scheduler console and can only be configured/changed by PEN CS support staff.

 If you are planning to create a bulk configuration please contact PEN CS support prior to applying it, as it may conflict with an existing schedule created by PEN CS. Also please note that you can disable bulk schedules you created, but you can't delete them, so there will be a history of your bulk schedules.



Login in to [My PEN Portal](https://users.pencs.com.au)³⁸ and this will by default will show your organisation page on My PEN.



Click on "Go to Primary Health Network Portal "and this will take you to your organisations scheduler management console on MY PEN.

³⁸ <https://users.pencs.com.au>

Up to Parent Organisation

Warning! You do not belong directly to this Organisation

[Go to Primary Health Network Portal](#)
[Go to SMS Portal](#)

Organisation Name * PHN-Test-A
Cross Reference Number ref number
Street Address * Street A
Suburb * Suburb A
State * New South Wales
Postcode * 2000
Phone * 02 9506 3200
Fax fax
Clinical Software * None Not verified
Billing/Appointment Software * None Not verified
Parent Organisation PEN CS Pty Ltd
Status Is Active

Save changes Delete Organisation

MyPEN Store My Orgs Search Support Reports Dashboard Schedule Setup






Practice Dashboard - PHN-Test-3.3-A

Search Practice

Practice Name	X Offline	Last Month	Current Month	Next Month
Totals		8	4	2
Success ●		4	2	
Pending ●			2	
Failed ●		4		
Started ⊕				
Not Yet Due				2
Offline ▲		30		
1Jyoti_Practice	0		▲ Offline	
AFTestTopbar	2		▲ Offline	
Arthi BP Test Org	3			
Arthi HCH Test	0			
Arthi MD Clinic	0			
arthi md loc	0			
Arthi Sky	0			
Arthi Sky org	0			
Arthi Support org	0			
Arthi Test 2	8	● 14/01/2019	● 14/02/2019 ▲ Offline	
Arthi Zedmed Clinic	0			
Arthi Zedmed Test Org	3	● 01/01/2019		

Dashboard:

This screen is called Practice Dashboard or Dashboard and in here you will be able to see all of your licensed practices, the number of practices who have successfully completed the collection, how many are pending, started, failed and offline.

Practice Dashboard - PHN-Test-3.3-A				
Search Practice <input type="text"/> <input type="button" value="Q"/>				
Practice Name	X Offline	Last Month	Current Month	Next Month
Totals		8	4	2
Success 		4	2	
Pending 			2	
Failed 		4		
Started 				
Not Yet Due				2
Offline 		30		

Practice Dashboard: A view by practice of the schedule submission status for

- Last Month
 - Current Month
 - Next Month
 - Number of times a practice has gone Offline
- **Totals:** will display the number of practices with Scheduler for Last Month, Current Month and Next Month.
 - **Success:** will display the number of practices with Scheduler and out of those that successfully performed the collection for Last Month, Current Month and Next Month.
 - **Pending:** will display the number of practices with Scheduler and out of those that are still pending or awaiting for collect to complete but started the collect.
 - **Failed:** will display the number of practices with Scheduler and out of those that started to collect but failed to complete the collect.
 - **Started:** will display the number of practice with Scheduler and out of those that started the collect.
 - **Not Yet Due:** will display the number of practices with Scheduler and out of those that are not yet due for a collect.
 - **Offline:** will display the number of practices with Scheduler and the number of times it has been offline since scheduler installation.

Any practices that are offline will not run any collects scheduled as part of Bulk Schedule created on MyPEN or as individual schedules.

The traffic light system is used to display

Success (green)

Pending (orange)

Failure (red)

Warning (where offline)

Practices not submitting greyed out

If you have lot of practices, you can scroll down and can select the next page count to view the list of practices.

Practice Name	X Offline	Last Month	Current Month	Next Month
Totals		8	4	2
Success ●		4	2	
Pending ●			2	
Failed ●		4		
Started ⊕				
Not Yet Due				2
Offline ⚠		30	How many time a prticular practice went offline	
1.Jyoti_Practice	0		⚠ Offline	
AFtestTopbar	2		⚠ Offline	
Arthi BP Test Org	3			
Arthi HCH Test	0			
Arthi MD Clinic	0			
arthi md loc	0			
Arthi Sky	0			
Arthi Sky org	0			
Arthi Support org	0			
Arthi Test 2	8	● 14/01/2019	● 14/02/2019 ⚠ Offline	
Arthi Zedmed Clinic	0			
Arthi Zedmed Test Org	3	● 01/01/2019		
Ash Test Sch Clinic	0			
ash_bp	0			
ash_md	1		⚠ Offline	
Ash.sched	0		⚠ Offline	
ash_sky	0		⚠ Offline	

Schedule Setup:

To schedule a collection/upload click on the 'Schedule Setup' tab on top of your screen:

Store My Orgs Search Support Reports Dashboard **Schedule Setup**

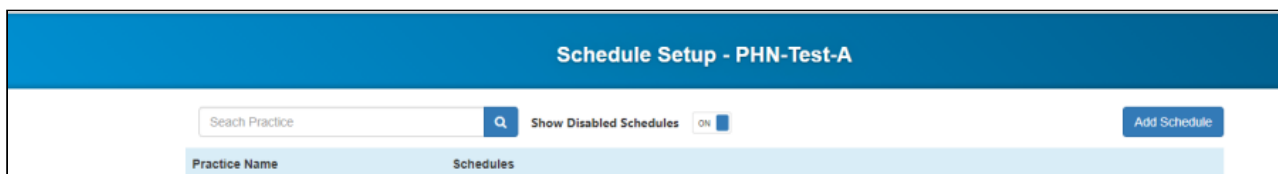
Practice Dashboard - PHN-Test-3.3-A

Search Practice

Practice Name	X Offline	Last Month	Current Month	Next Month
Totals		8	4	2
Success ●		4	2	
Pending ●			2	
Failed ●		4		
Started ⊕				
Not Yet Due				2
Offline ▲		30		
1.Jyoti_Practice	0		▲ Offline	
AFtestTopbar	2		▲ Offline	
Arthi BP Test Org	3			
Arthi HCH Test	0			
Arthi MD Clinic	0			
arthi md loc	0			
Arthi Sky	0			
Arthi Sky org	0			
Arthi Support org	0			
Arthi Test 2	8	● 14/01/2019	● 14/02/2019 ▲ Offline	

The 'Schedule Setup' tab will show you a list of practices not submitting are greyed out, also practices without Scheduler will be shown as Not Deployed and greyed out.

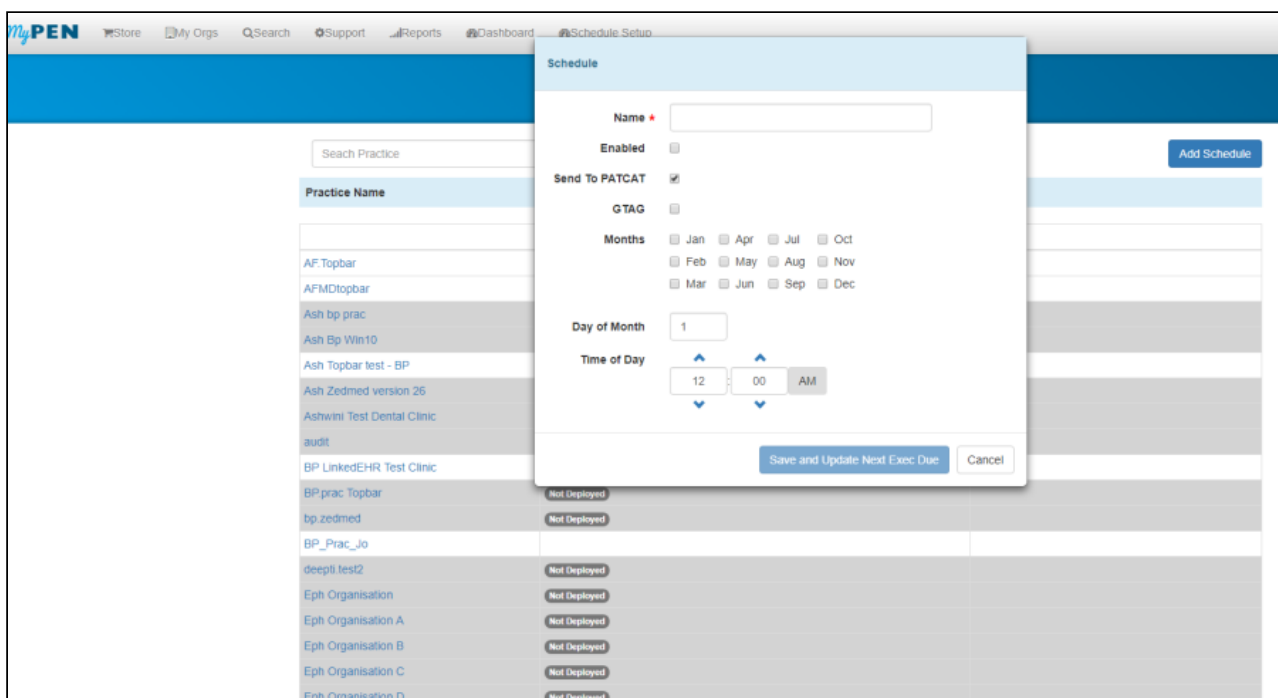
Practice Name	Schedules
	Status Custom
AF.Topbar	
AFMDtopbar	
Ash bp prac	Not Deployed
Ash Bp Win10	Not Deployed
Ash Topbar test - BP	
Ash Zedmed version 26	Not Deployed
Ashwini Test Dental Clinic	Not Deployed
audit	Not Deployed
BP LinkedEHR Test Clinic	
BP.prac Topbar	Not Deployed
bp.zedmed	Not Deployed
BP_Prac_Jo	
deepti.test2	Not Deployed
Eph Organisation	Not Deployed
Eph Organisation A	Not Deployed
Eph Organisation B	Not Deployed
Eph Organisation C	Not Deployed
Eph Organisation D	Not Deployed
Jo.Sky_TestClinic	



Search Practice: You can search for a specific practice using the search box provided, this could be used to exclude/include a particular practice from a collection.

Show Disabled Schedules: There is an option to display the Disabled Schedules.

Add Schedule: Click on Add Schedule tab to create a new schedule for all the practices below



Name: Specify the name of the collect you are scheduling, for example: PHN Quarterly Collect or PHN Monthly Collect

Enabled: By selecting this check-box you are authorising this collect to go-ahead.

Send To PATCAT: It is enabled by default and if you are not creating a bulk schedule to submit data, but just to collect the data then you can untick the selected check-box.

Note: By Default, Send to PATCAT is enabled. If you want to create a second schedule for your practices without submission, you can untick "Send To PATCAT "and create a schedule for the practices, so it will collect but won't submit any data.

G-Tag: If your PHN purchased a G-Tag License then you can select this check-box and this would submit G-Tagged data.

Months: You can select the check-boxes next to the months to specify for which months you can want the collect/

submission to happen.

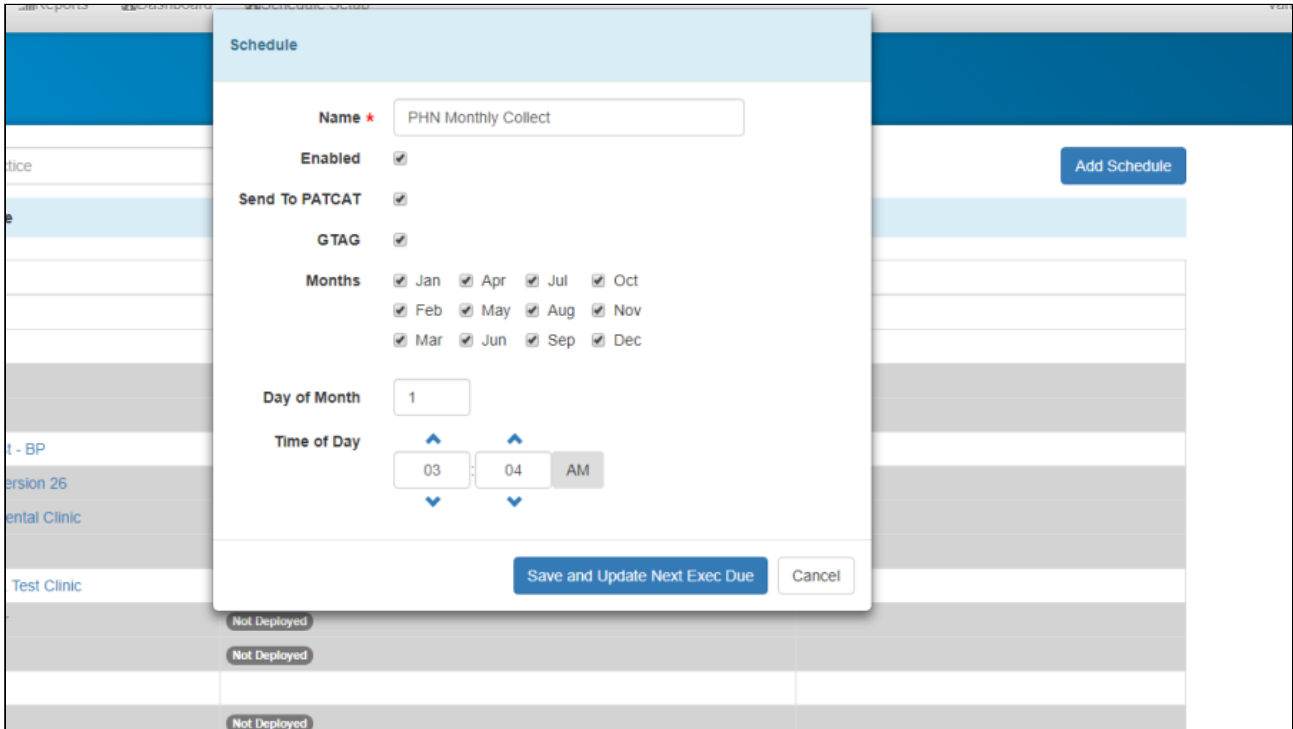
Day of Month: Specify the date when you want the schedule to run.

Time of Day: You can specify when you want the schedule to run for all practices. Generally we advise to schedule the collect after business hours.

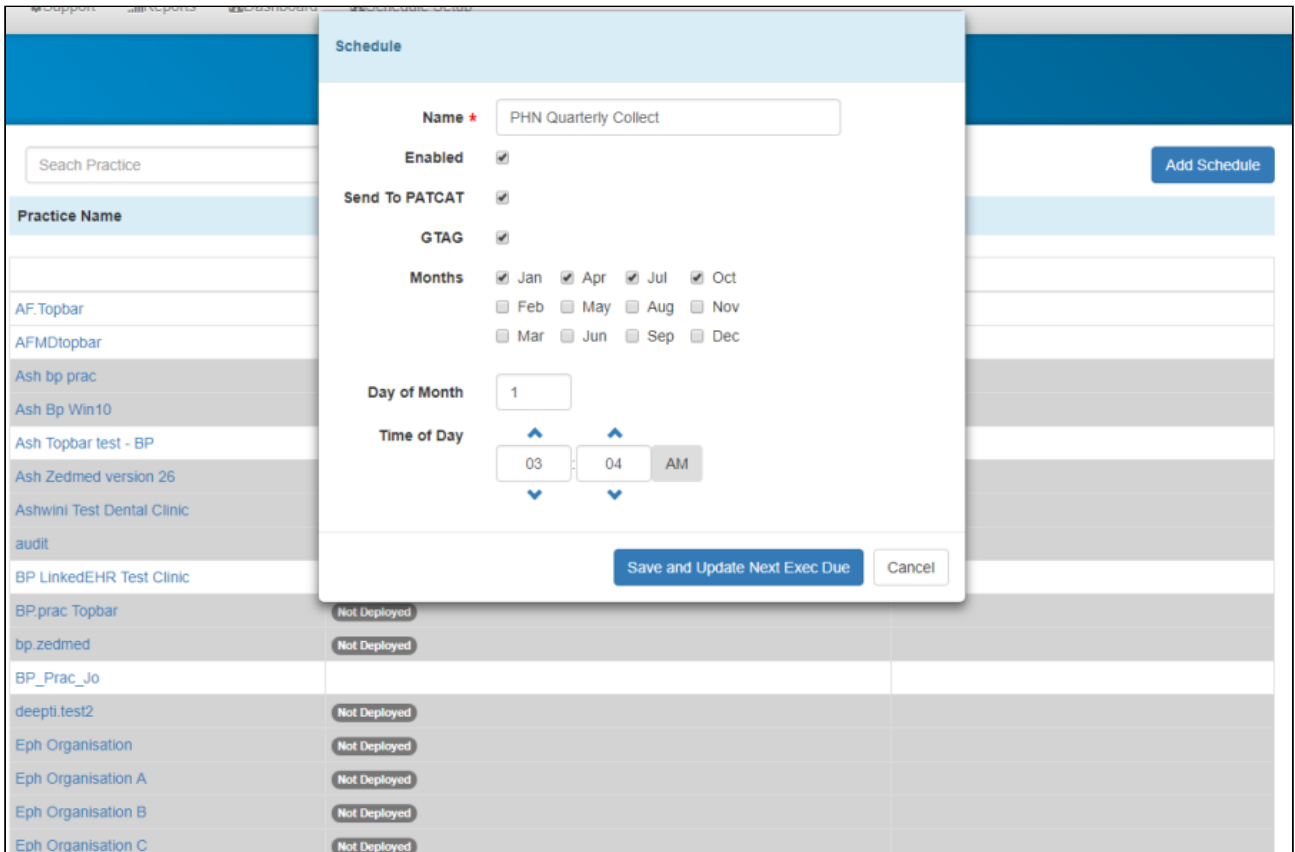
For example, you can schedule after midnight or early in the morning at 3:00 am.

Finally, click on **Save and Update Next Exec Due**, it will save the bulk schedule we just created.

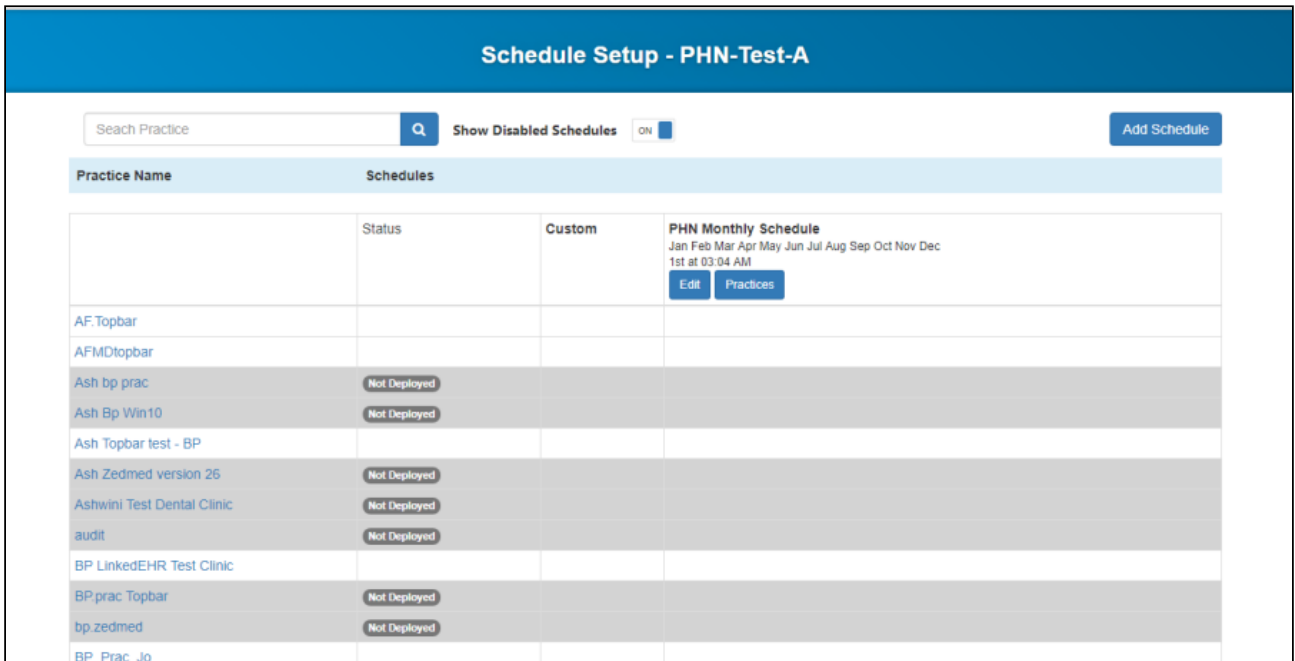
PHN Monthly Collect:



PHN Quarterly Collect:



Once the schedule is saved, the dashboard will be present the created bulk schedule/schedules.



You can click on Edit on the newly created bulk schedule to modify or for update.
When you click on "Practices" link, you will see a list of all the practices with their scheduler status. Practices who are doing a manual submission will be listed as such only if PEN CS support is aware of their manual submission. Support can set the status to 'manual' which will be reflected here.

Practices		
<input type="checkbox"/>	Artni Zeamed Clinic	Not Deployed
<input type="checkbox"/>	Arthi Zedmed Test Org	Scheduled Submission
<input type="checkbox"/>	Ash Test Sch Clinic	Not Deployed
<input type="checkbox"/>	ash.bp	Not Deployed
<input type="checkbox"/>	ash.md	Scheduled Submission
<input type="checkbox"/>	Ash.sched	No Collection
<input type="checkbox"/>	ash.sky	Scheduled Submission
<input type="checkbox"/>	Ash.zedmedv24	Scheduled Submission
<input type="checkbox"/>	Ash_new clinic	Not Deployed
<input type="checkbox"/>	ash_reg.bp	Scheduled Submission
<input type="checkbox"/>	Ashwini Diet Practice	Not Deployed
<input type="checkbox"/>	Ashwini Test Clinic	Not Deployed
<input type="checkbox"/>	Ashwini Test D Clinic	Scheduled Submission
<input type="checkbox"/>	Ashwini Win12 Clinic	Scheduled Submission
<input type="checkbox"/>	Ashwini Yoga Practice	Manual Submission
<input type="checkbox"/>	Ashwini ZM Win12 Clinic	Scheduled Submission
<input type="checkbox"/>	BP LinkedEhr backup org	Not Deployed
<input type="checkbox"/>	BPnew	Not Deployed
<input type="checkbox"/>	Chanel_MD	Not Deployed
<input type="checkbox"/>	ChanelMd	Not Deployed

Save Cancel

Status: It defines the current state of Scheduler at practice level and as per the image we have few different status

Scheduled Submission: Practice is on V3 and is scheduled for submission via bulk schedule created on MY PEN.

Not Deployed: Practice is currently don't have Scheduler installed

No Collection: Practice / PHN informed that the practice choose not to submit the data and hence practice is marked as not submitting data.

Manual Submission: Practice / PHN informed that the practice choose to submit the data manually and they have either scheduler installed/not installed.

Note: Currently, Scheduler is compatible with only MD3, BP, Zedmed, Communicare and soon Genie (April 2019). Where the practice uses any other CIS apart from those mentioned, they need to submit the data manually.

Offline: Currently, Scheduler installed at the practice is offline and this needs to be investigated and get it turned back on.

 **Note to PHN planning to use this document to create a bulk schedule:**

Currently, all your practices on Scheduler will have practice level schedule scheduled by PEN CS based on the PHN request. Before you can create any bulk schedule on MyPEN using the Scheduler Management Console all the practice level schedules need to be made inactive. Please advise the PEN CS support team in writing to support@pencs.com.au³⁹ about the planned schedule and you can request have all practice level schedules disabled. Once the practice level schedules are disabled you can go ahead and create a bulk schedule to Collect/Submit.


³⁹ <mailto:support@pencs.com.au>

5 PAT CAT Responsibilities and Requirements



5.1 Responsibilities

Server Maintenance and Availability

- The server hosting PAT CAT is under your control and as such needs to be monitored and maintained
- Should the server be unavailable during a scheduled upload time PENCS can assist in the resending of data from practices as V3 of scheduler allows for remote triggering of a data upload. This functionality will be made available to PHNs shortly as well.
- Server disk space – PAT CAT will need sufficient disk space at all times to ensure that scheduled uploads can be imported. The server host needs to monitor and allocate the required disk space before scheduled collects.
 - Web Server – at least 50GB free disk space.
 - If extract files are stored in another disk, the 50GB free disk space also applies there.
 - SQL Server – at least 150GB free disk space.
- PAT CAT updates are managed and pushed out by PENCS but need to be applied by the PHN. This will allow the PHN to choose the best time for an update (over the weekend or in the evening is recommended).
-  Updating PAT CAT to the latest version is responsibility of the PHN and failing to update can result in reports/data missing as well as wrong figures being displayed if an update contained an algorithm change. Please make sure that you update when new updates are available!
- Server operating system and security updates are responsibility of the host.
- Access to the Server by PEN CS for PAT CAT trouble shooting and maintenance needs to be provided either ongoing or in a timely manner so that any issues can be addressed without delay. A clear escalation pathway should be provided by the ACCHO/PHN.
- Server certificates such as SSL and other server specific maintenance are the responsibility of the host.

IT Contact Details to be provided

The PHN should provide the best contact details for their IT support to allow PEN CS staff to access the PAT CAT server(s) if needed. Access might be required for error checking, updates or other software maintenance issues. If access details or IT providers change PEN CS should be notified by contacting the relevant account manager.

Practices and licence maintenance

With the alignment of PAT CAT and the licensing portal, the ACHOs/PHNs are responsible for maintaining an up to date list of practices in the licensing portal. This will ensure that only licensed practices are active in PAT CAT.

Practices that are using CAT Plus but are not submitting data to PAT CAT **have** to be configured in PAT CAT accordingly as this is an agreement between the practice and the ACCHO/PHN.

As an additional safe guard we are implementing a configuration setting in the licensing portal to indicate which practices are uploading automatically, manually or not at all. This status needs to be confirmed with PEN CS so we can update the licensing portal accordingly to avoid any accidental uploads/collections via remote trigger.

5.2 Requirements

Web Server	Minimum Requirements	Recommended Requirements
Operating System	Microsoft Windows Server 2008 (Standard/R2) X64	Microsoft Windows Server 2012 (Standard/R2) X64 or higher
Processor	8 Logical Cores	24+ Logical Cores
RAM	16 GB	32+ GB
Hard Disk	250 GB	500+ GB
Microsoft .NET Framework	<ul style="list-style-type: none"> .NET 3.5, 4.5 and 4.6.1 IIS 7+ IIS Web components(ASP.NET 4.5, Static & Dynamic Content Compression, IIS Manager) 	
Other Requirements	<ul style="list-style-type: none"> Broadband internet connection (minimum 5 Mbs up + 5 Mbs down) SSL Certificate (Single root or Wildcard dependent on IT infrastructure, Wildcard recommended) Dedicated PAT CAT Subdomain (e.g. https://patcat.yourphnurl.org.au) Port forwarding from port 80 to port 443 for all PAT CAT traffic Remote access facilities for installation and maintenance by Pen CS (e.g. Remote Desktop, Teamviewer...etc.) with local Admin privileges Firewall exception for connectivity to database server (standard SQL Server ports are TCP 1433 and UDP 1434) Internet Explorer 11+ or Google Chrome v42+ 	

Note: "+" refers to "more is better"

Database Server	Minimum Requirements	Recommended Requirements
Operating System	Microsoft Windows Server 2008 (Standard/R2) X64	Microsoft Windows Server 2012 (Standard/R2) X64 or higher
Processor	16 Logical Cores	32+ Logical Cores
RAM	32 GB	64+ GB
Hard Disk	1TB	1+TB

Database Server	Minimum Requirements	Recommended Requirements
Microsoft .NET Framework	<ul style="list-style-type: none"> • .NET 3.5, 4.5 and 4.6.1 	
Database	<ul style="list-style-type: none"> • Microsoft SQL Server 2008r2 Standard Edition (2014 Standard Edition or higher recommended) <p>SQL Server Options installed:</p> <ul style="list-style-type: none"> • SQL Server Management Studio • Mixed Mode Authentication • SQL Server Agent 	
Other Requirements	<ul style="list-style-type: none"> • Firewall exception for connectivity to web server (standard SQL Server ports are TCP 1433 and UDP 1434) • Remote access facilities for installation and maintenance by Pen CS (e.g. Remote Desktop, Teamviewer...etc.) with local Admin privileges, and database owner privileges 	

Note: "+" refers to "more is better"

6 QUICK STEP GUIDES

These guides provide a brief summary for experienced computer and CAT Plus users to assist with installation and other tasks.

- [CAT Plus Installation Step by Step Guide](#)(see page 94)
- [CAT Plus Practice Installation Checkup](#)(see page 95)
- [CAT Plus for New Users](#)(see page 97)
- [Network Setup for CAT Plus](#)(see page 98)

6.1 CAT Plus Installation Step by Step Guide



CAT Plus installation steps

This document provides dot points for the installation of the CAT Plus suite. Our detailed installation guide for CAT4 is [here](#)⁴⁰ and the Topbar technical guides can be found [here](#)⁴¹.

CAT4

No administrator rights are needed to install CAT4. If multiple users share a workstation, CAT4 needs to be installed in each user profile⁴²

- Start your web browser and go to <http://install.pencs.com.au/ClickOnce/CAT4/publish.htm>
- Click on 'Install' and wait for the download/install to finish, allow installation when prompted
- Log on to CAT4 using your username/password
- From the dashboard, choose any view to display the CAT4 user interface
- Click on Edit/Preferences
- Enter the details for GP application, Extract Directory, Saved Filters and Saved Views. Practice ID is not required, practice name and postcode should be entered
- Extract directory location should be on a shared network drive accessible to all CAT4 users. Local drive C: is not recommended even if there is only one user as it is normally not backed up.
- Go to the 'Data Submission' tab and change the location of the 'Patient Consent Withdrawn File Directory' to the same network drive and directory you have chosen for the extract directory, example if the extract folder is in S:\ClinicalAudit then this location should point to S:\ClinicalAudit\Settings
- Depending on clinical system used, click on the respective tab for the clinical system and configure billing systems and other required details. The clinical systems tabs provide additional information for the configuration. Please refer to the [full installation guide](#)⁴³ for details.

Topbar

Topbar requires the installation of a server component on the clinical system server (where MD3 or Best Practice is installed) and a workstation component on each machine. Only the server component needs to be installed by an administrator. If multiple users share a workstation, Topbar needs to be installed in each user profile. Full details

⁴⁰ <https://help.pencs.com.au/display/CG/INSTALLATION>

⁴¹ <https://help.pencs.com.au/display/TTG>

⁴² <http://help.pencs.com.au/topbar.htm>

⁴³ <https://help.pencs.com.au/display/CG/INSTALLATION>

are available [here](#)⁴⁴

Server installation

- Log in to <https://topbar-users.pencs.com.au> with your username and password⁴⁵
- Click on the clinic you are installing (if multiple clinics are displayed)
- Click on 'Download Clinic Server' to start the download of the latest server installer
- Start the installation by running the downloaded installer .exe file
- Depending on your setup you might have to install additional components (.net 4.0 and/or SQL Server)
- Configure the clinical and billing system used

Workstation installation

- Log in to <https://topbar-users.pencs.com.au> with your username and password⁴⁶
- Click on the clinic you are installing (if multiple clinics are displayed)
- Click on 'Download and Configure Topbar' to start the download of the latest workstation installer
- Start the installation by running the downloaded installer .exe file
- Log on using your Topbar username and password and configure clinical and billing system
- Topbar will start
- Log on to the clinical system and if desired configure Topbar to start with Windows and/or to log on with the clinical system in the Topbar settings

PAT CAT

PAT CAT will be installed by Pen CS on the PHN server. No installation at the practice is required. Practice staff will need the username and password created by the PHN PAT CAT administrator to log on to PAT CAT through their internet browser. The URL for PAT CAT needs to be provided to the practice, Pen CS support can provide that information. We are planning to create a link on the CAT4 dashboard to PAT CAT to further increase the integration of the CAT Plus products.

6.2 CAT Plus Practice Installation Checkup



CAT Plus QRG Practice Installation Check

This document provides a checklist for practice support staff on how to check basic settings of an existing CAT4 installation. Our detailed installation guide for CAT4 is [here](#)⁴⁷ and the Topbar technical guides can be found [here](#)⁴⁸.

CAT4 Preferences

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

- Clinical Audit Tab: Check the extract directory location – if the practice has more than one CAT4 user, the extract has to be on a shared folder available to all users. We recommend not to use the local C: drive even if there is only one user as network folders are normally included in the backup, but local drives are not.

⁴⁴ <https://help.pencs.com.au/display/TTG>

⁴⁵ <http://topbar.pencs.com.au>

⁴⁶ <http://topbar.pencs.com.au>

⁴⁷ <https://help.pencs.com.au/display/TGC>

⁴⁸ <https://help.pencs.com.au/display/TTG>

- Clinical Audit Tab: Check the saved filters and views directory locations, they should be a sub folder of the extract directory and be the same for all CAT users
- BP/MD3 tab: Check BP or MD3 for correctly configured billing system
- Topbar tab: If using Topbar, check if CAT4 is connected to the local Topbar server, if unsure you can click on 'Edit' on the Topbar tab and then use the 'Text Connection' button
- Scheduler tab: If Scheduler is installed for this user/on this machine check if the scheduler working folder is entered and correct
- Data Submission tab: Make sure the 'Patient Consent Withdrawn Folder' is the same for all instances of CAT4 as otherwise this will create different de-identified data based on which user de-identified the data

Send To PAT CAT

The full guide is available [here](#)⁴⁹

To check an existing configuration:

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

Scheduler

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

Topbar

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

PAT CAT

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

⁴⁹ <https://help.pencs.com.au/display/CG/Configure+Send+to+PATCAT>

6.3 CAT Plus for New Users



If you have just started working for a PHN or other organisation and need to some sources helping you to understand CAT Plus you have come to the right place. This page provides links to relevant videos and other resources to get you started. PEN CS provides free webinars as well as recordings of webinars and you have already found our online help site with full user guides and step by step guides on specific topics.

Webinars:

Our webinar schedule can be found here: <https://www.pencs.com.au/support/webinars/>

Make sure you check regularly as we update frequently. New topics are also announced in our PHN and GP newsletters. To sign up for general practice staff use this [link](#)⁵⁰ and for PHN/other organisation sign up [here](#)⁵¹

Videos:

We host our videos on [Vimeo](#)⁵² but here are some particularly relevant videos for new users:

[CAT4 for Beginners \(50 min\)](#)⁵³

[CAT4 for Intermediate Users \(50m\)](#)⁵⁴

[CAT4 for Advanced Users \(50m\)](#)⁵⁵

[Topbar - the whole story \(55m\)](#)⁵⁶

The videos above are comprehensive and show general and specific functionality of CAT4 and Topbar. If you are interested in a particular functionality and have already a basic understanding of the tools you might be interested in these topical videos:

[Data Quality \(20m\)](#)⁵⁷

[Quality Coding \(20m\)](#)⁵⁸

[CAT Plus Prompts \(20m\)](#)⁵⁹ - using notifications for clinicians based on CAT4 and Topbar prompts

[Cancer Screening \(20m\)](#)⁶⁰

[Topbar Overview and UI Update](#)⁶¹

A full list of all topics can be found [here](#)⁶²

Very short 'tip of the month' videos with an average duration of around two minutes: [Tip of Month Videos](#)⁶³

Recipes (Step by Step Guides):

50 <https://lp.constantcontact.com/su/HMglOwO/gpnewsletter>

51 <https://lp.constantcontact.com/su/vol5q3y/phnnewsletter>

52 <https://vimeo.com/pencs/albums>

53 <https://vimeo.com/showcase/5971048/video/333035756>

54 <https://vimeo.com/showcase/5971048/video/334838209>

55 <https://vimeo.com/showcase/5971048/video/335791619>

56 <https://vimeo.com/showcase/5971048/video/338624192>

57 <https://vimeo.com/showcase/5501750/video/303377371>

58 <https://vimeo.com/showcase/5501750/video/303395692>

59 <https://vimeo.com/showcase/5501750/video/306713551>

60 <https://vimeo.com/showcase/5501750/video/313062130>

61 <https://vimeo.com/showcase/5145972>

62 <https://vimeo.com/showcase/5501750>

63 <https://vimeo.com/showcase/5501758>

To get hands on experience the recipes are a great starting point. The full list of recipes is accessible here: [CAT Recipes](#)⁶⁴

Here are some selected topics that will help you to get started:

[Identify active patients with at least 3 visits in the last 2 years](#)⁶⁵

[Add Weight, Height and Waist Measurements to Patient Record](#)⁶⁶

[Identify patients with Allergy or Smoking Status NOT recorded](#)⁶⁷

[Ensure all diabetic patients are coded with the correct diagnosis in the clinical software.](#)⁶⁸

[Increase HbA1c recording for Type II diabetic patients to 95% or higher and increase ACR recording by 10%.](#)⁶⁹

[PIP QI Improvement Measures](#)⁷⁰ - ten recipes to show the details on the PIP QI Improvement Measures

User Guides:

This CAT4 document will give an overview of the user interface and examples for activities with CAT4: [CAT4 - New Users Guide](#)⁷¹

Topbar has a brief user guide for each app - they can be found here: [Topbar Apps in Detail](#)⁷²

PAT CAT is the 'big sister' of CAT4 and the user interface is built the same way as CAT4. However there are some differences in particular in the additional modules such as:

[PAT Programs](#)⁷³

[PAT2CAT Filters](#)⁷⁴

[OLD_PAT PIP QI Essentials Guide](#)(see page 97)

[OLD_PAT CAT PIP QI Professional Guide](#)(see page 97)

To understand how practices are set up and other configuration is handled, have a look at [GETTING STARTED](#)⁷⁵ and the pages listed there.

6.4 Network Setup for CAT Plus



64 <https://help.pencs.com.au/display/CR>

65 <https://help.pencs.com.au/display/CR/Identify+active+patients+with+at+least+3+visits+in+the+last+2+years>

66 <https://help.pencs.com.au/display/CR/Add+Weight%2C+Height+and+Waist+Measurements+to+Patient+Record>

67 <https://help.pencs.com.au/display/CR/Identify+patients+with+Allergy+or+Smoking+Status+NOT+recorded>

68 <https://help.pencs.com.au/pages/viewpage.action?pagelD=174097260>

69 <https://help.pencs.com.au/pages/viewpage.action?pagelD=174097298>

70 <https://help.pencs.com.au/display/CR/PIP+QI+Improvement+Measures>

71 <https://help.pencs.com.au/display/CG/CAT4+-+New+Users+Guide>

72 <https://help.pencs.com.au/display/TUG/Topbar+Apps+in+Detail>

73 <https://help.pencs.com.au/display/ds/PAT+Programs>

74 <https://help.pencs.com.au/display/ds/PAT2CAT+Filters>

75 <https://help.pencs.com.au/display/ds/GETTING+STARTED>

6.4.1 URL Permissions

URLs that need to be added to trusted sites or firewall exception to enable CAT4 installation and licence authentication.

This is where the user licence gets validated for CAT4.

- <https://auth1.pencs.com.au>⁷⁶
- <https://auth2.pencs.com.au>

This is where CAT4 gets installed from and where it checks for automatic updates and downloads them via ClickOnce.

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

6.4.2 For data submission to PAT CAT

PAT CAT URLs & Sent to PAT CAT URL


PAT CAT URL

<https://patcat.MYPATCATDETAILS.org.au>

Send To PAT CAT webservice address

https://patcat.MYPATCATDETAILS.org.au/pcs_uploadservice.asmx

6.4.3 EXCLUSIONS

-  Depending on practice anti-virus configuration this might need a reboot of the computer or a restart of the relevant anti-virus services on the computer with the Pen CS products. This is a decision for practice IT support as we don't know the local configuration.

6.4.3.1 Folder paths that need to be under the exclusions list of any Anti-virus software

⁷⁶ <http://auth1.pencs.com.au/UsageService.asmx>

FOR CAT 4 AND SCHEDULER

- C:\ProgramData\PEN CS
- C:\Program Files\PCS\PCS Clinical Audit
- C:\Program Files (x86)\Pen Computer Systems

6.4.4 PERMISSIONS**6.4.4.1 Add FULL CONTROL permission to LOCAL COMPUTER USERS****FOR CAT 4 AND SCHEDULER**

- C:\ProgramData\PEN CS
- C:\Program Files\PCS\PCS Clinical Audit
- C:\Program Files (x86)\Pen Computer Systems

**6.4.5 EXCEPTIONS**

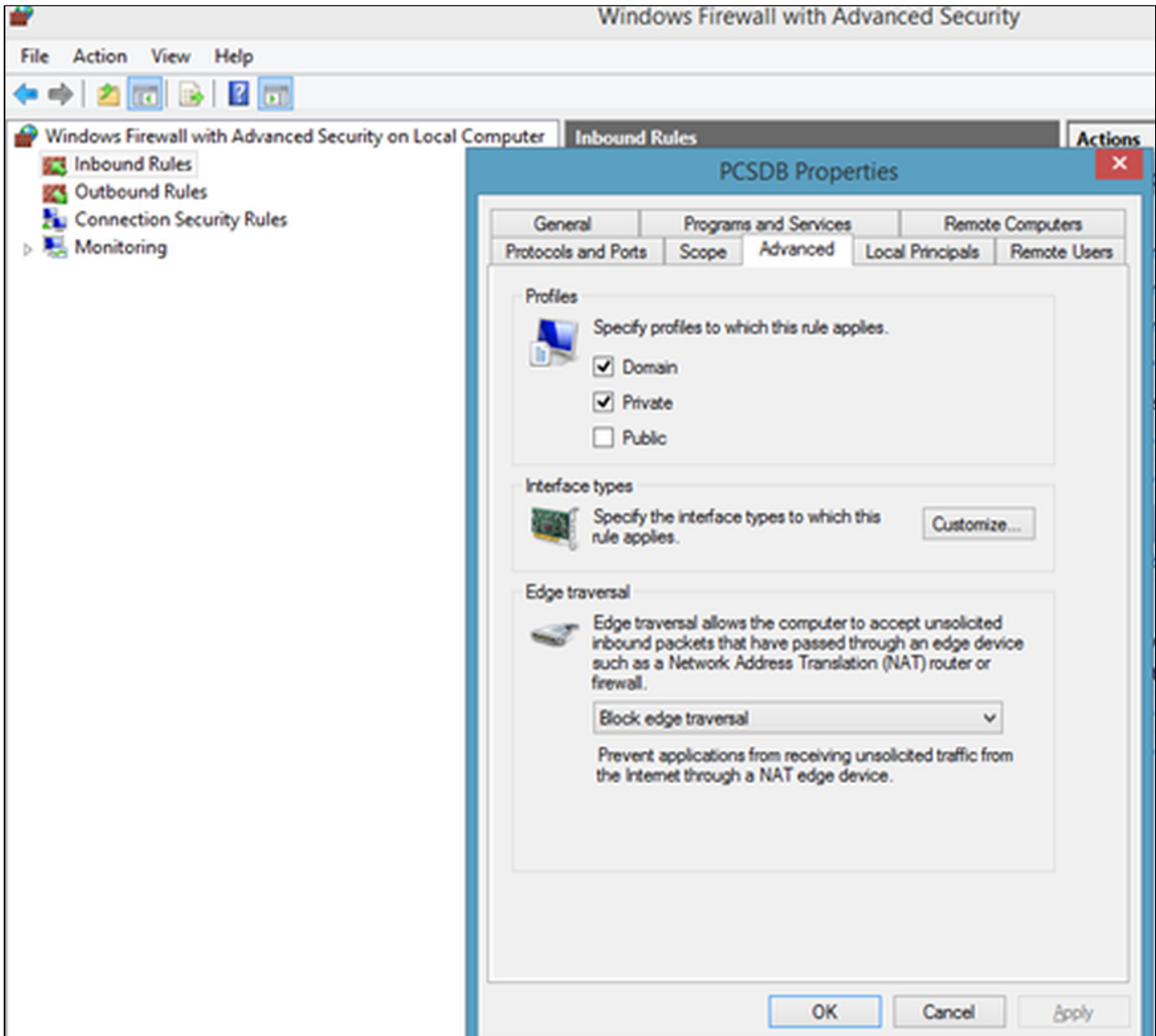
URLs that need to be added to trusted sites or firewall exception to enable licence authentication. This is where the user licence gets validated for Topbar.

- <https://auth1.pencs.com.au>
- <https://auth2.pencs.com.au>
- <http://<local host name>/8086>

Firewall Settings

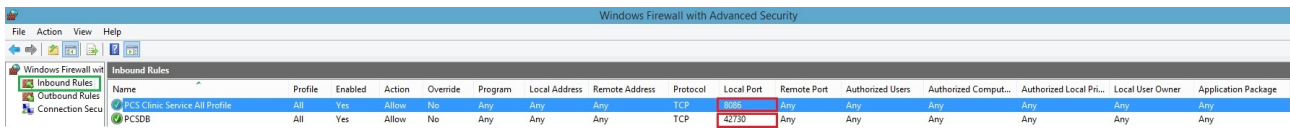
❗ After applying the changes to the firewall, the SQL Server (PCSDB) service and PCS Clinic Service need to be restarted

Set profile to Domain and Private as in screenshot below:



Ports that need to be added in to the inbound rules of the firewall on the server

For Topbar : 8086 For PCSDB : 42730



6.4.6 EXCLUSIONS

⚠ Depending on practice anti-virus configuration this might need a reboot of the computer or a restart of the relevant anti-virus services on the computer with the Pen CS products. This is a decision for practice IT support as we don't know the local configuration.

The folder path **of the Server** needs to be under the exclusions list of any Anti-virus software.

FOR TOPBAR SERVER

- C:\Program Files (x86)\PCS

FOR TOPBAR DESKTOP APP

- C:\Users<**USER PROFILE**>\AppData\Roaming\PCS\PCS Desktop

7 CAT Plus Health Care Homes

For the purposes of evaluating the Health Care Homes (HCH) Trial, Pen CS has enhanced its current CAT Plus suite of products to allow participating practices to enrol and manage patients who have agreed to take part in the HCH Trial. This enhanced functionality is delivered through the Health Care Homes PAT Program.

The Pen CS platform includes four fully integrated products:

- Topbar – decision support tool at point of care
- CAT4 – practice population extraction and reporting tool
- Pen CS Scheduler – automated CAT4 collection and data submission tool
- PAT Programs – Patient enrolment, tracking, filtering and reporting solution

⚠ Please note: The process described here relates to flagging a patient in TopBar/CAT4. To formally enrol patients into the Health Care Home Program, with the Department of Human Services practices need to enrol patients using the Health Professional Online Services (HPOS) system and follow any other steps necessary to complete the enrolment.

Participating practices will gain access to the HCH App in Topbar. The HCH App will allow the health professional to enrol a patient into one of three tiers according to their care requirements. For practices not using Topbar, a patient enrol solution using CAT4 is available, however Topbar is the recommended tool for patient enrolment.

CAT4 reporting and filtering provides an additional level of detail allowing practices apply their own risk stratification rules to recall patients that may benefit from participating in the trial. Once patients have been enrolled in a HCH tier, CAT4 provides options to filter by those tiers to assist with patient health management throughout the duration of the trial.

Monthly CAT4 data collections can be automated and will collect, de-identify and submit de-identified data to both the PHN and the Health Policy Analysis Pty Ltd for further evaluation.

Please note that Topbar is available for MD3, BP and Zedmed, while CAT4 is compatible to a range of other clinical systems. Any participating clinic or ACCHS will have to decide between Topbar and CAT4 as an enrolment tool prior to commencing the enrolment of patients. We recommend, where possible, to use Topbar at the point of care while the patient is present at the clinic.

Topbar and CAT4 provide different functionality in the context of the HCH trial:

- Topbar is mainly used to flag enrolled patients and has a basic report showing all patients flagged as enrolled at the clinic
- CAT4 can flag patients for enrolment if Topbar is not compatible to the clinical system
- CAT4 provides new reports and filters to enable clinics to analyse their data with regards to patients HCH status

We have created a number of quick reference guides and videos to illustrate the functionality of Topbar and CAT4 for HCH:

For Topbar users:

[Health Care Homes App User Guide - Topbar](#)⁷⁷

[HCH Topbar App Video](#)⁷⁸

For all HCH trial participants:

[Health Care Homes CAT4 Management](#)⁷⁹

[HCH CAT4 Management Video](#)⁸⁰

For users who will use CAT4 to flag patient enrolment:

[Health Care Homes CAT4 Enrolment](#)⁸¹

[HCH CAT4 Enrolment Video](#)⁸²

77 <https://help.pencs.com.au/display/TUG/Health+Care+Homes+App>

78 <http://vimeo.com/244151511>

79 <https://help.pencs.com.au/display/CG/Health+Care+Homes+CAT4+Management>

80 <http://vimeo.com/244155488>

81 <https://help.pencs.com.au/display/CG/Health+Care+Homes+CAT4+Enrolment>

82 <http://vimeo.com/244156874>

8 Consent Management Portal

PEN CS has built this functionality to give our users an easy way to ask for and to receive consent for any data collection outside the already established agreements. The Consent Management Portal is licence coded and only available to those organisations who have been licensed by PEN CS - all others won't be able to access the portal.

The Consent Management Portal allows PHNs and other organisations to invite practices to a program that requires consent and the practices can use the same portal to accept the invitation and to upload their consent form. This creates a central location within the licensing portal MyPen for practices as well as for PHNs/Other organisations to ensure that consent has been given. The portal also provides a history of actions to see who invited and who provided consent.

Only once the requirements for consent have been met will the practice receive the linked functionality of the program they have consented to - this is an additional layer of ensuring that no one but the consenting users are participating.

The user guides are split in two parts, one for practice users and one for PHNs/Other organisations. The links below provide the full details:

- [Consent Management Portal for PHNs/Other organisations](#)(see page 105)
- [Consent Management Portal Guide for Practices](#)(see page 111)

8.1 Consent Management Portal for PHNs/Other organisations



This guide will show you how you can access the consent portal, invite practices and manage enrolled practices. Details on how practices receive invitations and how they can respond are here: [Consent Management Portal Guide for Practices](#)(see page 111)

Accessing the Consent Management Portal

When logging on to the MyPen portal at <http://users.pencs.com.au/> you will see the option to access the Consent Portal on the top right of your screen:

Up to Parent Organisation

Warning! You do not belong directly to this Organisation

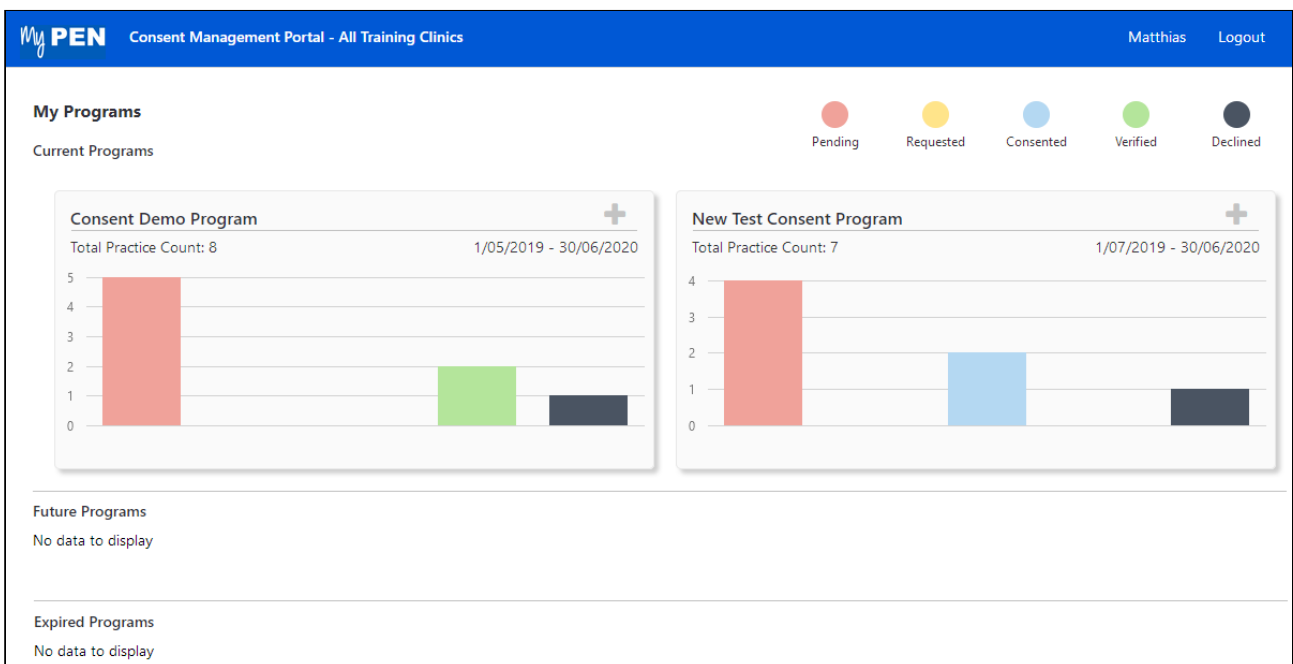
[Go to Primary Health Network Portal](#)
[Go to SMS Portal](#)
[Go to Consent Management Portal](#)

Organisation Name * PHN-
Cross Reference Number ref number
Street Address * PHN-
Suburb * PHN-
State * New South Wales
Postcode * 0000
Phone * 0000000000
Fax fax
Clinical Software * Best Practice Not verified
Billing/Appointment Software * Best Practice Management Not verified
Parent Organisation PEN CS Pty Ltd
Status Is Active

Save changes Delete Organisation

Managing Programs

The portal will show any existing programs. Please note that at this stage new programs can only be created by Pen CS. The example below shows two existing programs, one called 'Data Linkages' and one called 'test program' for my organisation:



Depending on the scheduled date of a program there can be future programs (start date in the future) or expired programs displayed as well. The colours/numbers indicate the status and number of practices, with the following colour codes:

- red = Pending
- yellow = Requested more information
- blue = Consented
- green = Consented and verified
- Black = invite declined

Manage Practices in a Program


Clicking on a program will open the 'Manage Practices' tab and show more details about the invited practices:

The screenshot displays the 'My PEN Consent Management Portal - All Training Clinics' interface. At the top, the user 'Matthias' is logged in. The main heading is 'New Test Consent Program'. Key statistics include 'Total Practices: 8' and 'Program Duration: 01 Jul 19 to 30/06/2020'. A bar chart shows the status distribution: Pending (4), Requested (0), Consented (3), Verified (0), and Declined (1). Below this is a table with tabs for 'Manage Practices', 'Select Practices', and 'Program Settings'. The table lists 8 practices with columns for Practice, Comments, Submitted By, Date, Action, History, and Download.


Practice	Comments	Submitted By	Date	Action	History	Downlo...
Edweana's Test Practice		warren.moore	29/07/2019	✓ ? ✕	🕒	
James Test Clinic	I accept	james.alcorn	26/08/2019	Verify	🕒	
James Testing Clinic - Medical Director	did not want to participate, will get back to us	james.alcorn	26/08/2019		🕒	
James Testing Clinic - Surface Pro	Yes we consent	james.alcorn	2/09/2019	Verify	🕒	
Manfred Practice	signed and uploaded form	Matthias	3/09/2019	Verify	🕒	📄
Matthias Test Clinic		Matthias	30/07/2019	✓ ? ✕	🕒	
Warren Moore's Practice		Matthias	29/07/2019	✓ ? ✕	🕒	
Yupar's Own Practice		yupar.nyo	29/07/2019	✓ ? ✕	🕒	

In the program above we have three clinics that have consented and still need to be verified by clicking on the green 'Verify' button. One clinic has declined and four are currently pending. The verification involves reviewing the

uploaded consent form and the clicking the 'Verify' button. Any uploaded consent forms can be accessed by

clicking on the download icon 

Consent History

The last column will show a history for each practice by clicking on the clock symbol: 

History			
Status	Date Received	Comment	Submitted By
			🔍
● Pending	26/08/2019		james.alcorn
● Consented	26/08/2019	I accept	james.alcorn
● Verified	3/09/2019	verified by PHN	Matthias

Close

This history allows for an audit trail in addition to the uploaded consent form.

Invite Practices

The 'Select Practices' tab allows you to invite more practices, either all practices by using the tick box on the top left, or individual practices by using their own tick box. You can start typing the name of the practice in the search field to narrow the list down quickly.

Manage Practices	Select Practices	Program Settings
Select Practices to be invited to participate in the Program		
<input type="checkbox"/>	Practice	Postcode
	Q ma	Q
<input type="checkbox"/>	Manfred Practice	3004
<input type="checkbox"/>	Manfred Training Practice	3004
<input type="checkbox"/>	Manfred Training Practice - Client	3004
<input type="checkbox"/>	Matthias QA Clinic	2000
<input type="checkbox"/>	Matthias Test Clinic	2000
<input type="button" value="Save"/>		

After inviting practices, click on 'Save' on the bottom right of the tab.

You will then see a confirmation message:

Save successful
1 practice(s) were invited. 0 practice invitations were revoked.
<input type="button" value="OK"/>

Invitations can only be revoked (by un-ticking a practice) before the practice has accepted the invite, once they have consented they can't be removed on the 'Select Practices' tab.

The newly added practice is now visible on the 'Manage Practices' tab:

Manage Practices		Select Practices	Program Settings					
Practice	Comments	Submitted By	Date	Action	History	Downlo...		
Edweana's Test Practice		warren.moore	29/07/2019	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Gareth Test Clinic		Matthias	3/09/2019	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
James Test Clinic	verified by PHN	Matthias	3/09/2019					
James Testing Clinic - Medical Director	did not want to participate, will get back to us	james.alcorn	26/08/2019					
James Testing Clinic - Surface Pro	Yes we consent	james.alcorn	2/09/2019	<input type="button" value="Verify"/>				
Manfred Practice	signed and uploaded form	Matthias	3/09/2019	<input type="button" value="Verify"/>				
Matthias Test Clinic		Matthias	30/07/2019	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Warren Moore's Practice		Matthias	29/07/2019	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Yupar's Own Practice		yupar.nyo	29/07/2019	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				










Program Settings

On the Program Settings tab a consent form can be added for the practices to download and instructions can be added. This could be a simple text or a hyperlink to more details of the program. These details can be edited even after practices have been invited.

Manage Practices	Select Practices	Program Settings		
Consent Form Template:		<input type="button" value="Upload"/>	<input type="button" value="Download"/>	consent form sample.pdf
Consent Form Instructions:				
<div style="border: 1px solid #ccc; padding: 10px; min-height: 40px;"> Please read, print and sign the attached consent form. You can also sign electronically. After signing please upload the form. </div>				
				<input type="button" value="Save"/>

Consent on behalf of practices

If a PHN/other organisation has already completed the consent process for a program with a practice this screen allows you to provide consent on behalf of the practice(s). The options available in the 'Action' column are:

Manage Practices		Select Practices	Program Settings					
Practice	Comments	Submitted By	Date	Action	History	Downlo...		
 Edweana's Test Practice		warren.moore	29/07/2019	  				
 Gareth Test Clinic		Matthias	3/09/2019	  				

1. Consent to participate in the program
2. Request more information
3. Decline to participate in the program

The history function will store your user name for any action that is performed for an audit trail.

8.2 Consent Management Portal Guide for Practices



When your practice has agreed to participate in a particular program involving CAT Plus you can provide consent using the MyPen portal. Normally you would receive information and notifications from your PHN/Other organisation prior to this about the program. The Consent Management Portal is a central point for you to keep track of any programs your practice is involved in and to manage your consent. In most cases a signed consent form would have to be scanned and uploaded.

This guide will show you how to use the portal.

Participating in a program often involves a new functionality in CAT Plus such as additional reports or upload of de-identified data. These additional functionalities are linked to the Consent Management Portal and will only be available once you have consented. Consent can be removed at any time which will disable the additional, program specific functionality again.

Accessing the Consent Management Portal

When logging on to MyPen at <https://users.pencs.com.au/> with your CAT Plus user name and password you will see the option to 'Go to Consent Management Portal' on the top right:

[Go to Consent Management Portal](#)

Organisation Name *

Cross Reference Number

Street Address *

Suburb *

State *

Postcode *

Phone *

Fax

Clinical Software * Verified

Billing/Appointment Software * Not verified

[Save changes](#)

The portal will show any existing, future and expired programs and their status, your practice has been invited to.

My PEN Consent Management Portal - Matthias Test Clinic
Matthias [Logout](#)

My Programs

Current Programs

● Pending
 ● Requested
 ● Consented
 ● Verified
 ● Declined

New Test Consent Program ●

From All Training Clinics

Program Duration 1/07/2019 - 30/06/2020

Action Update Date: 30/07/2019

✓
?
✕
Consent Form Template

Future Programs

No data to display

Expired Programs

No data to display

Actions in the Consent Management Portal

The table will show you the organisation who sent the invite, the name of the program, the status, any uploaded



files, date received and will give you a number of options:



If the program has a consent form attached, the button will be available. Clicking on it will open the 'Consent Form Download' window, which allows you to download the form and see any instructions provided by the program creator:

Consent Form Download

Consent form template:	consent form sample.pdf
Download instructions:	Please read, print and sign the attached consent form. You can also sign electronically. After signing please upload the form.

Download

Cancel

For a newly received invite your options are:



1: Consent to participate in the program

This will open the 'Consent Confirmation' window:

New Test Consent Program - Consent confirmation

You are about to provide consent to participate in the New Test Consent Program Program.

Please attach the signed agreement if required to be able to participate:

Attachment: Browse... No file selected.

By ticking the box below you are providing consent:

I agree

Additional Comment:

✕
 Form has been signed and attached

Submit
Cancel

To consent tick the 'I agree' box and enter an additional comment, then click on 'Submit'. Attach your signed agreement (if required) by using the 'Browse' button to locate the electronic copy of your agreement and upload it with your consent.



2: Decline to participate in the program . This will open the 'Decline Confirmation' window.

New Test Consent Program - Decline confirmation

You are about to decline to participate in the New Test Consent Program Program.

Please provide a short reason.

Comment: *

✕
 Not interested at this stage

Submit
Cancel

Enter a comment such as a reason to decline, then click on 'Submit'. This will close the window and change your status to 'Declined' for this program.



3: Request more information

New Test Consent Program - Request More Information confirmation

You are about to request more information to participate in the New Test Consent Program Program.

Please provide the request details.

Comment: *

Enter a comment to explain your request for more information and click on 'submit'. This will be seen by your PHN and should be responded to by providing more information.

After consenting

Once you have consented to a program the status will change in your Consent Management Portal page to this:

My Programs

Current Programs

New Test Consent Program ●

From All Training Clinics

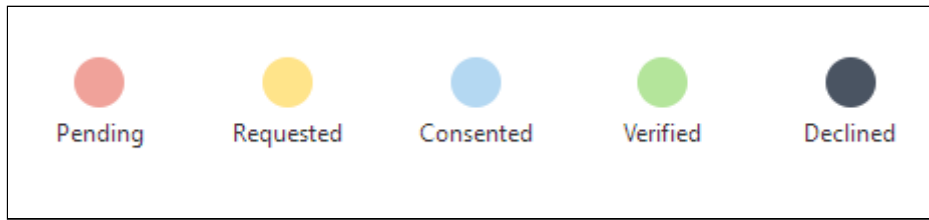
Program Duration 1/07/2019 - 30/06/2020

Action Update Date: 4/09/2019

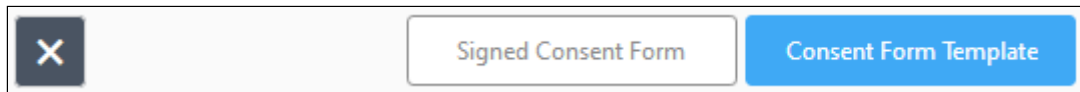
form has been signed and is attached

✕

The blue dot in the top right corner indicates that you have consented but your consent hasn't been verified yet. Once verified, it will change to green as per the colours on the top right of your screen:



You can download your signed consent form or a new consent form template by using the respective button on the program window:



For programs that you have already accepted you can change your participation status by clicking on the black x



icon:

This will pop up a window with the program name and the option to decline further participation in the selected program:

New Test Consent Program - Decline confirmation

You are about to decline to participate in the New Test Consent Program Program.


Please provide a short reason.

Comment: *

Once declined, the status will change in the 'Current Programs' table to 'Declined' indicated by the black dot in the top right corner, as shown below. This will also disable any functionality related to the program which could be additional reports, upload of de-identified data or any other function. Your CAT Plus software will continue to work as before, but the program specific functionality won't be available any more. You can opt back in by clicking the



in the bottom right of the program window.

New Test Consent Program 

From All Training Clinics

Program Duration 1/07/2019 - 30/06/2020

Action Update Date: 4/09/2019

declined

Signed Consent Form

Consent Form Template

This concludes the user guide for the Consent Management Portal - a new central place for practices to provide consent to research programs or any other specific program requiring consent.