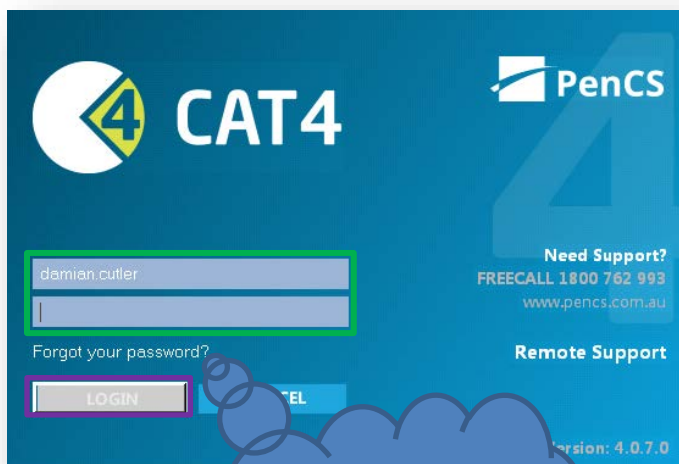


Clinical Audit Tool 4 (CAT4): Getting Started

1. To open the CAT4, select the **icon** from your desktop.



2. This will bring up the CAT4 logon window. Enter your **CAT4 credentials** and hit **LOGIN**. (If you don't have CAT credentials, please speak with your supervisor.)



Forgot your password? You can reset it yourself with either your username or email address

CAT4 Getting Started

3. Once open, you will be on the **CAT4 dashboard** which has options upon how you open the CAT4, **Useful Links** & **Support contacts**.

The screenshot shows the CAT4 dashboard for user Mr Damian Cutler. The interface is blue with a central grid of tool icons. At the top right, there are links for 'Remote Support', 'Account Options', and a 'Close' button. A 'Useful Links' box on the right contains links for 'CAT Recipes', 'User Documentation', 'Training', 'Webinars', and 'PCS Website'. A 'Need Support?' box below it provides contact information: 'FREECALL 1800 762 993' and 'support@pencs.com.au'.

Welcome, Mr Damian Cutler.

Remote Support Account Options [Close](#)

CAT4
the full range of tools

Daily View
Manage your Registers, Risks and Care Plans

CDM View
Chronic Disease Management for Diabetes, CVD and CKD

Cleansing View
Manage your Data Cleansing Activities

PAT CAT
Practice Aggregation Tool

My CAT Wizard
Manage your own activities by using the My CAT Wizard to create custom views

I-qi View
Manage your Indigenous Quality Improvement Programs

Registrar View
Manage your Registrar Activities and Reporting

Programs
Registered Participation

Useful Links

- [CAT Recipes](#)
- [User Documentation](#)
- [Training](#)
- [Webinars](#)
- [PCS Website](#)

Need Support?

FREECALL 1800 762 993
support@pencs.com.au

CAT4 Getting Started

Options to Open CAT4

Below is a brief outline for the options to open the CAT4. For more detailed information, see the Quick reference guide for the CAT4 dashboard [here](#).



CAT4:..... Loads the full suite of CAT4 reports & tools

Daily View: Loads a reduced number of frequently used reports

CDM View: Loads reports related to management of Diabetes, CVD & CKD

Cleansing View:..... Loads reports related to data cleansing

My CAT Wizard: Allows users to create custom views loading only selected reports

I-qi View:..... Loads reports relevant to providing care to Indigenous patients

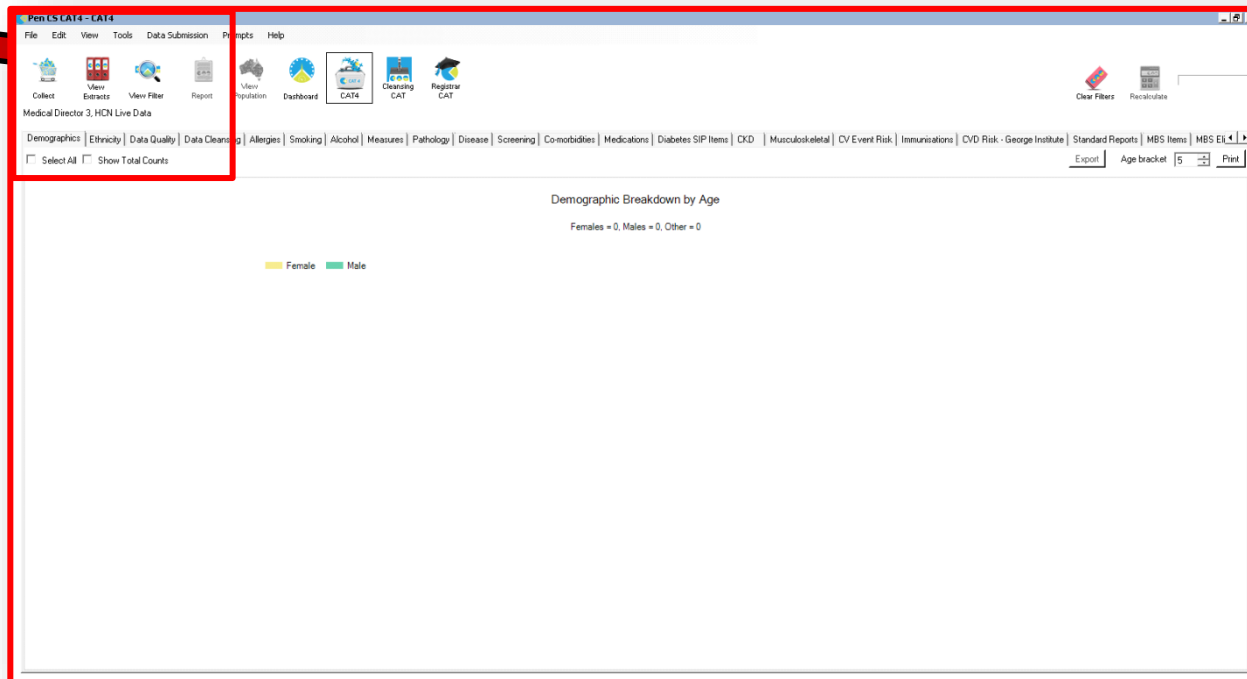
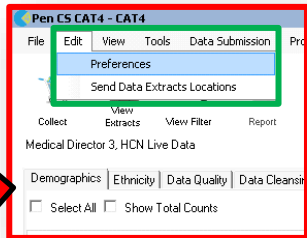
Registrar View:..... Provides reports for clinics with Registrar placements

CAT4 Getting Started

CAT4 – Full Suite of Reports & Tools – Preferences

After opening any of the reports and tools for the first time, you will need to setup your preferences to let the system know your clinical & billing software.

From the **home screen**, select **Edit**, then **preferences**.



CAT4 Getting Started

This will open the **Clinical Audit Tool 4 – Preferences** window on the **Clinical Audit** tab. You will need to select Medical **Director 3** as the **GP Application**, and your **Practice details**. Please talk to your supervisor if you're unsure of your Practice ID.

Clinical Audit Tool 4 - Preferences

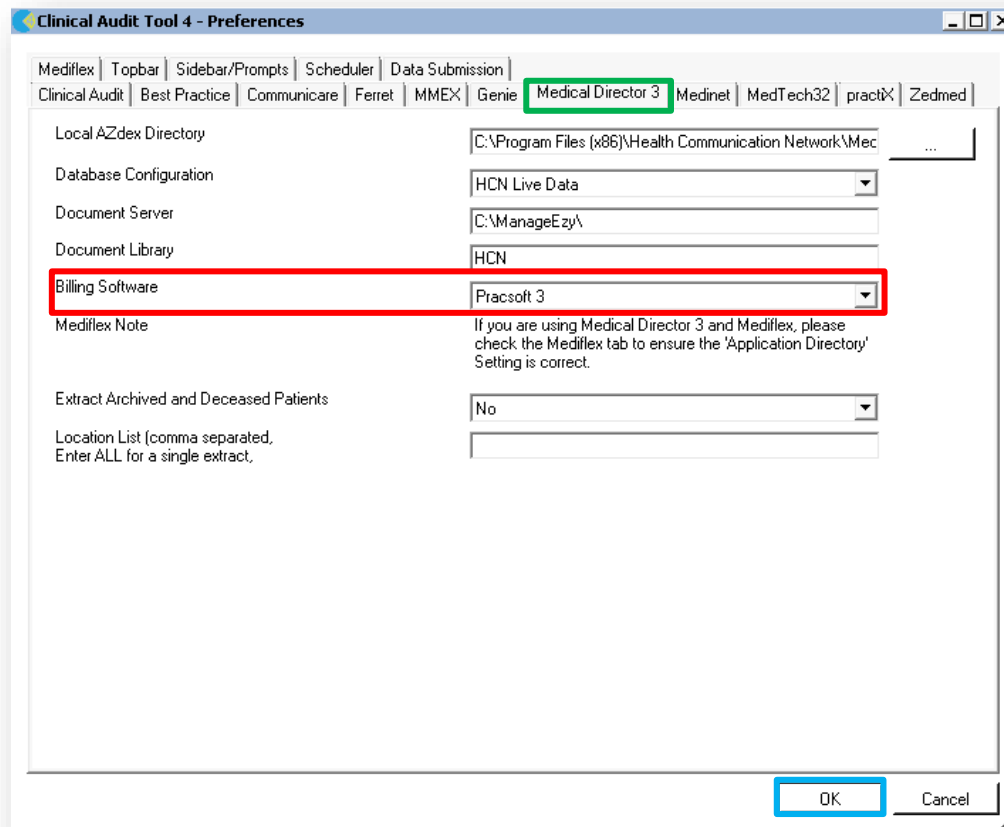
Mediflex | Topbar | Sidebar/Prompts | Scheduler | Data Submission | **Clinical Audit** | Best Practice | Communicare | Ferret | MMEX | Genie | Medical Director 3 | Medinet | MedTech32 | practX | Zedmed

GP Application	Medical Director 3
Extract Directory	C:\ClinicalAudit
Saved Filters Directory	C:\ClinicalAudit\SavedFilters
Saved Views Directory	C:\ClinicalAudit\SavedViews
Practice ID	
Practice Name	Galambilla AHSI
Practice Postcode	2450

OK Cancel

CAT4 Getting Started

Finally, you will need to enter the **Billing Software**, on the **Medical Director 3** tab, select **PracSoft 3** and hit **OK**. Your CAT4 is now configured for use.

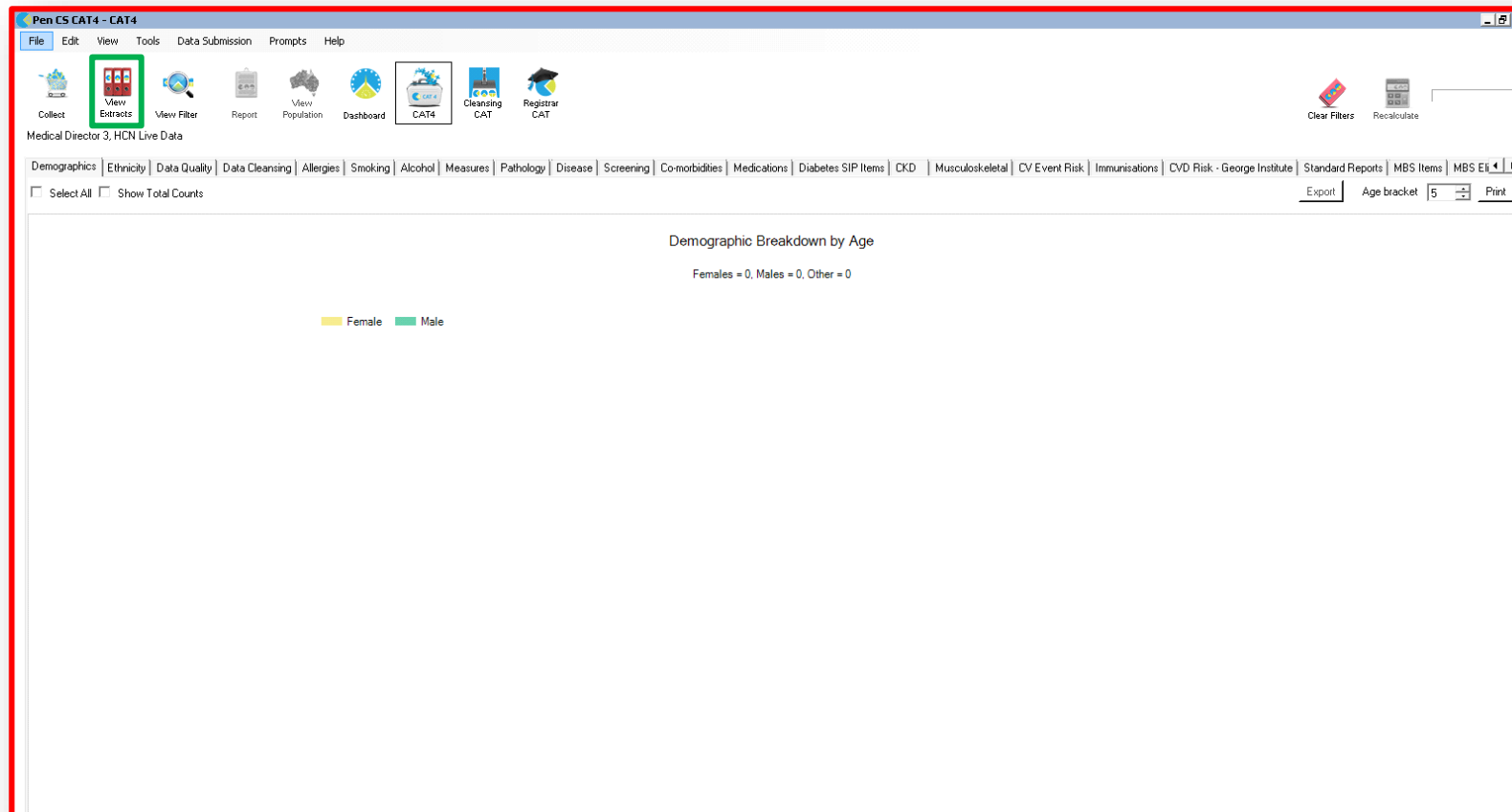


CAT4 Getting Started

Loading an Extract

Once configured, you will need to choose that data you want to report from. You do this by selecting **View Extracts** from the **Home screen**.

NB: An extract is a point in time where the CAT4 has taken a snapshot (copy) of data from Medical Director Clinical (MDC) & Medical Director PracSoft (PS), allowing reports to be run as at that point in time.



CAT4 Getting Started

Select from the **Extract list** the extract you would like to load. Once selected CAT4 will generate reports based on the extract. You can now **hide the extracts** to get some of your screen back.

The screenshot shows the CAT4 software interface. On the left, a list of extracts is displayed with columns for date, time, and population count. A red box highlights this list. A blue callout bubble points to the center column, stating: "The number in the center is the Total population @ that point in time." The right side of the interface shows a report titled "Medical Director 3, HCN Live Data" with a "Demographic Breakdown by Age" chart. The chart shows "Females = 0, Males = 0, Other = 0". The interface includes a menu bar (File, Edit, View, Tools, Data Submission, Prompts, Help) and a toolbar with icons for Collect, Hide Extracts, View Filter, Report, View Population, Dashboard, CAT4, Cleansing CAT, and Registrar CAT. The "Hide Extracts" icon is highlighted with a green box.

Date	Time	Population	Category
3/08/2015	7:00 PM	3637	GL
1/08/2015	9:18 AM	3636	12683
30/07/2015	7:00 PM	3635	GL
1/07/2015	11:00 PM	3815	GL
1/07/2015	4:00 AM	3814	GL
24/06/2015	11:00 PM	3798	GL
22/06/2015	2:22 PM	3789	12863
17/06/2015	11:00 PM	3783	GL
10/06/2015	11:00 PM	3788	GL
3/06/2015	11:00 PM	3784	GL
1/06/2015	4:00 AM	3772	GL
27/05/2015	11:00 PM	3762	GL
20/05/2015	11:00 PM	3755	GL
13/05/2015	11:00 PM	3736	GL
6/05/2015	11:00 PM	3731	GL
1/05/2015	4:00 AM	3718	GL
29/04/2015	11:00 PM	3716	GL
22/04/2015	11:00 PM	3699	DEIDENTIFIED_G
22/04/2015	11:00 PM	3699	GL
15/04/2015	11:00 PM	3706	GL
8/04/2015	11:00 PM	3699	GL
1/04/2015	11:00 PM	3692	GL
1/04/2015	4:00 AM	3690	GL
25/03/2015	11:00 PM	3675	GL
18/03/2015	11:01 PM	3653	GL
11/03/2015	11:00 PM	3644	GL
4/03/2015	11:00 PM	3618	GL
1/03/2015	4:00 AM	3609	GL
25/02/2015	11:01 PM	3604	GL

CAT4 Getting Started

CAT4 Home Screen

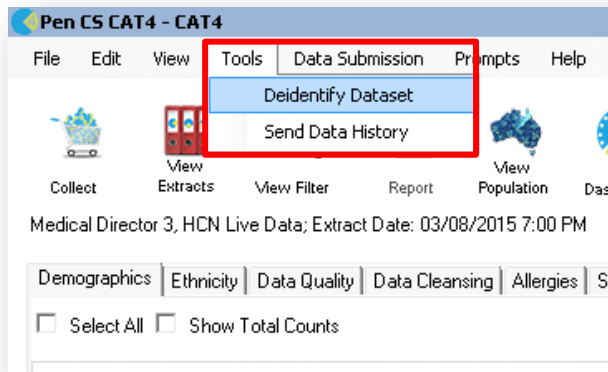
The CAT4 home screen has a **Menu bar**, **Menu icons**, **GP Application & Extract details** (filters & report selections if any are selected) and **Report tabs**. This guide will give a brief overview of these items, for more detailed information see guide [here](#).



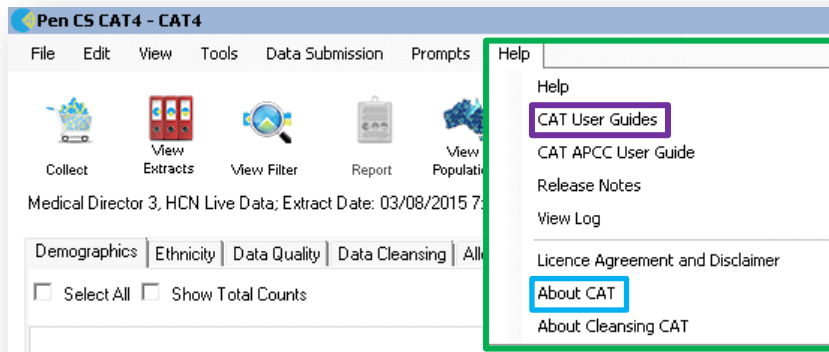
CAT4 Getting Started

Menu bar

Apart from the preferences setup under the edit menu, most users will only use the **Deidentify Dataset** option under the **Tools menu**. This option can only be run against an already loaded extract and will remove all patients identifying data but retain information for reporting purposes.



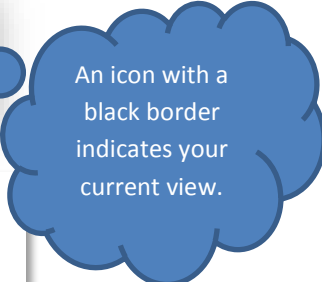
The **Help menu** has information about the **CAT4 version (About CAT)** and also a link to the **CAT User Guides** which can be found [here](#).



CAT4 Getting Started

Menu Icons

The **Menu icons** allow the switching of views in CAT4 and also the collecting of extracts. Please note DO NOT DO A COLLECT DURING BUSINESS HOURS as the collecting process will affect the performance of ALL USERS of Medical Director Clinical (MDC) & Medical Director PracSoft (PS). If you would like an extract collected, please talk to your supervisor as collects can be scheduled for out of business hours.



Collect:..... Collects an Extract from MDC/PS at that point in time

View Extracts: Toggles on & off the Extract pane listing all extracts

View Filters: Toggles on & off the Filter menu, covered below.

Report:..... Opens a report upon any selected segments from the report tabs

View Population: Opens a report of all patients taking into account any filters applied

Dashboard: Takes you back to the CAT4 Dashboard menu

CAT4: Changes view to CAT4 with full suite of tools and reports

Cleansing CAT: Changes view to the Cleansing CAT reports

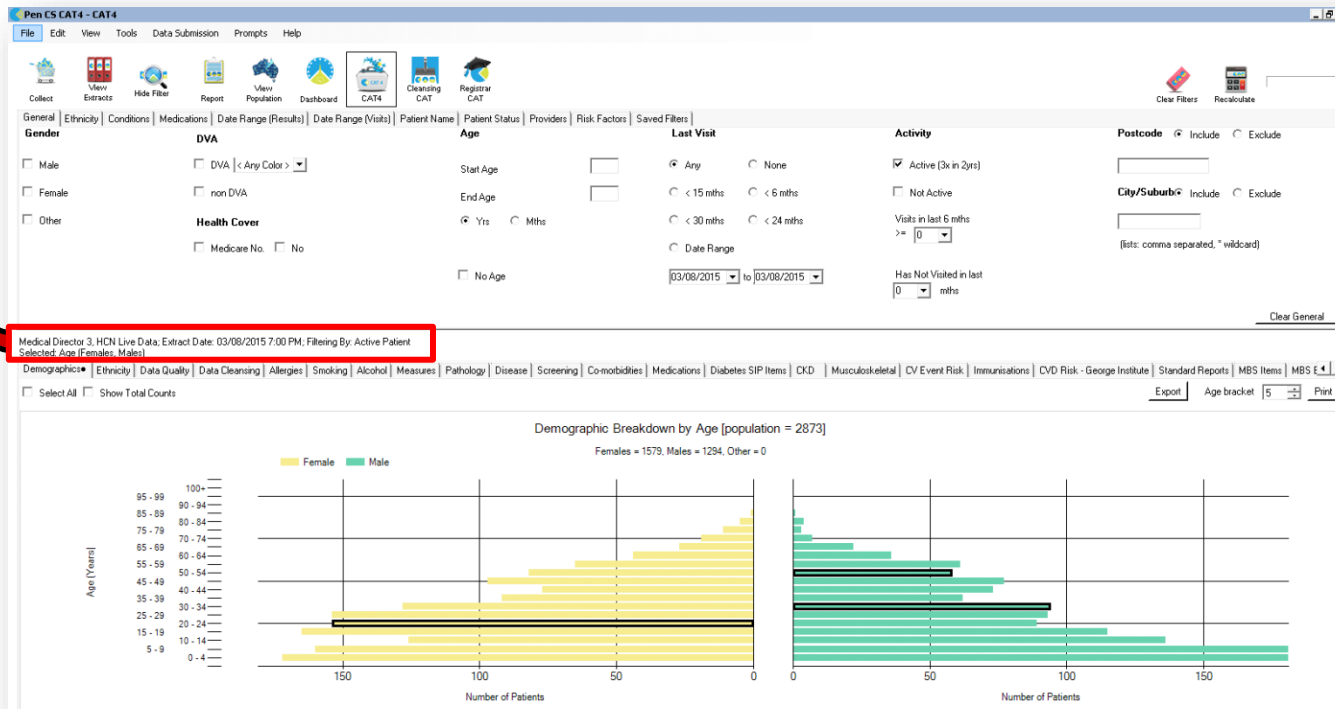
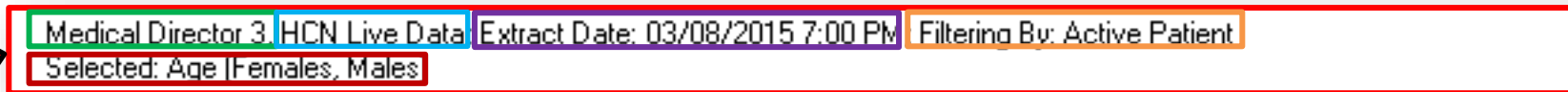
Registrar CAT: Changes view to reports for sites with Registrar placements

Daily View: Loads a reduced number of frequently used reports.

CAT4 Getting Started

GP Application, Extract details, Filters and Selections

Right above the report tabs (and below the filters menu if toggled open) will be the **GP application** you are using (which we setup in the preferences), **which data source the extract was taken from**, the **extract details**, **any filters applied** and any **report tab segments selected**.



CAT4 Getting Started

Report Tabs

The report tabs are numerous and also have sub tabs which will display specific information related to report tab they sit under. This guide will not go through all the report tabs (for full detail upon report tabs functionality see CAT4 guide [here](#).) but will highlight the options available for exporting, changing views and setting an age bracket for reports.

Under the reporting tabs on the left are the **Select All and Show Total counts** (You can also view percentages depending upon reporting tab) and on the right are the **Export, Age Bracket and Print options**. The Export button will open an export window which is covered on the next page.

The diagram illustrates the flow of report options. It starts with a screenshot of the main CAT4 interface where the 'Demographics' tab is selected, and 'Select All' and 'Show Total Counts' are highlighted with a red box. A green arrow points to a detailed view of these options. A blue arrow points to another detailed view showing 'Export', 'Age bracket' (set to 5), and 'Print' options. A red arrow points from the detailed view back to the main interface, and a blue arrow points from the detailed view to the main interface.

Demographics | Ethnicity | Data Quality
 Select All Show Total Counts

Demographics | Ethnicity | Data Quality
 Select All Show Percentage

Standard Reports | MBS Items | MBS Eli < >
Export Age bracket 5 Print

Pen CS CAT4 - CAT4

File Edit View Tools Data Submission Prompts Help

Collect View Extracts View Filter Report View Population Dashboard CAT4 Cleansing CAT Registrar CAT

Medical Director 3, HCN Live Data; Extract Date: 03/08/2015 7:00 PM

Demographics | Ethnicity | Data Quality | Data Cleansing | Allergies | Smoking | Alcohol | Measures | Pathology | Disease | Screening | Co-morbidities | Medications | Diabetes SIP Items | CKD | Musculoskeletal | CV Event Risk | Immunisations | CVD Risk - George Institute | Standard Reports | MBS Items | MBS Eli < >
 Select All Show Total Counts

Export Age bracket 5 Print

Demographic Breakdown by Age [population = 3637]
Females = 2018, Males = 1619, Other = 0

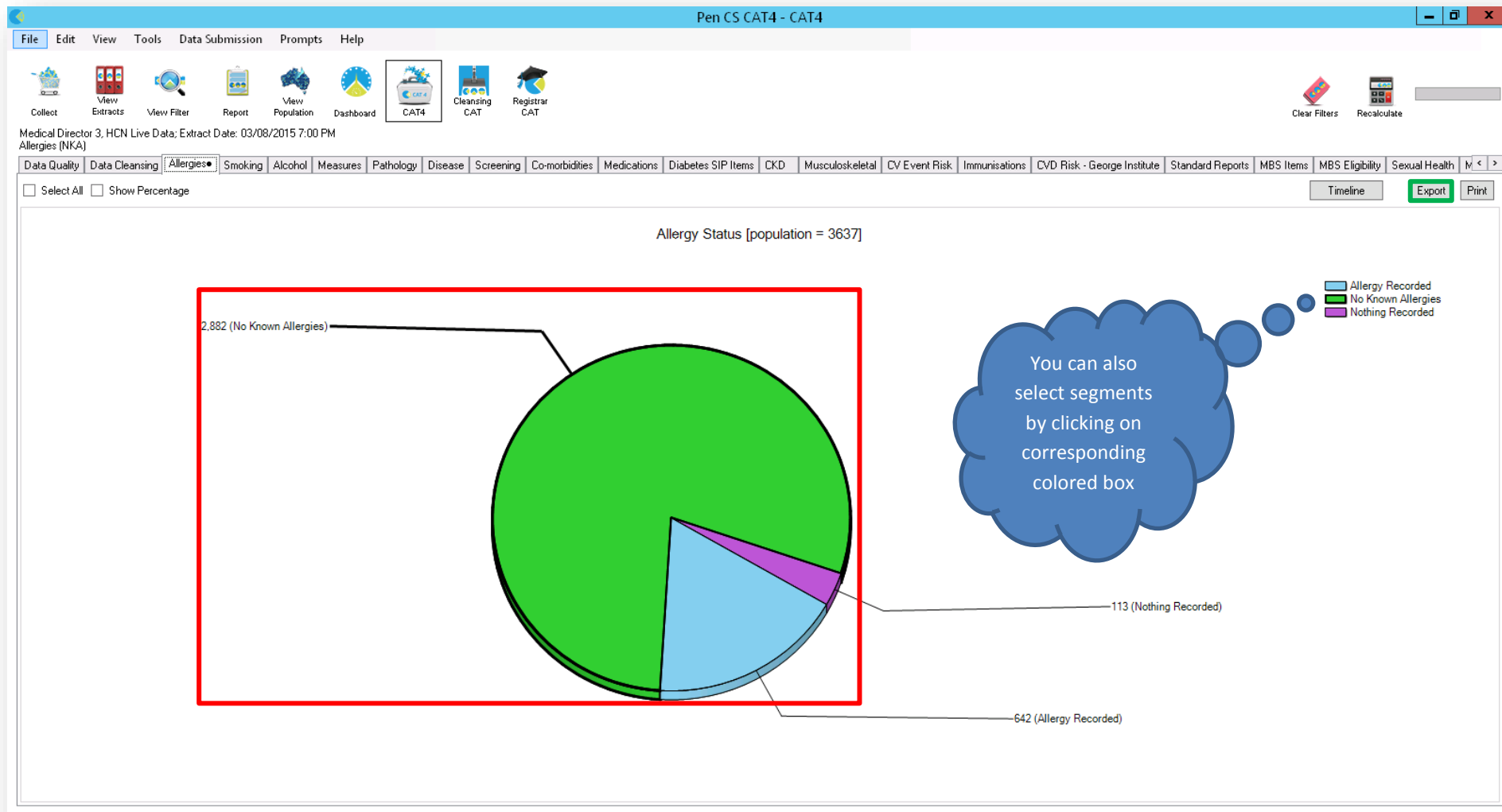
Female Male

Age Group	Female	Male
100+	0	0
95 - 99	0	0
90 - 94	0	0
85 - 89	0	0
80 - 84	1	1

CAT4 Getting Started

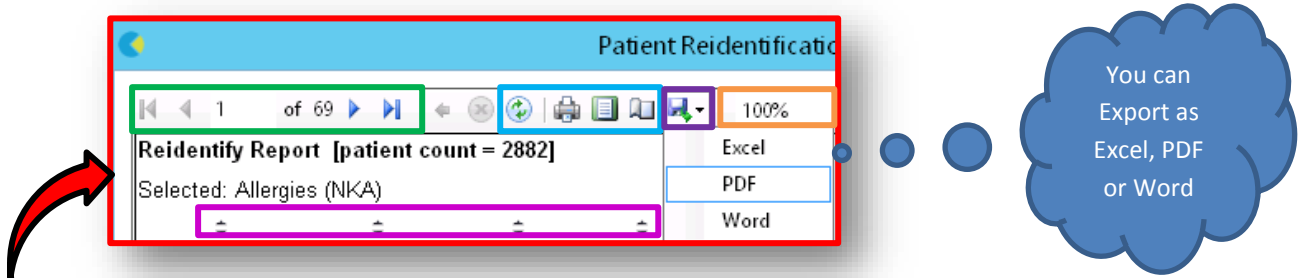
Exporting Reports

To export reports from the CAT 4, **select the required segment from the reporting tab** (selections can be made across multiple tabs and will displayed in the filter selections) which will **highlight the selection with a black border**. Click the **Export** button.



CAT4 Getting Started

This will open the **Export window**. From the **Export window** you can **select pages of the report to view**, **refresh**, **print**, **page layout**, **page setup**, **export** and **zoom the view**. You can also **sort fields within the report with the arrows** above each field. Select a file type to export the report as.

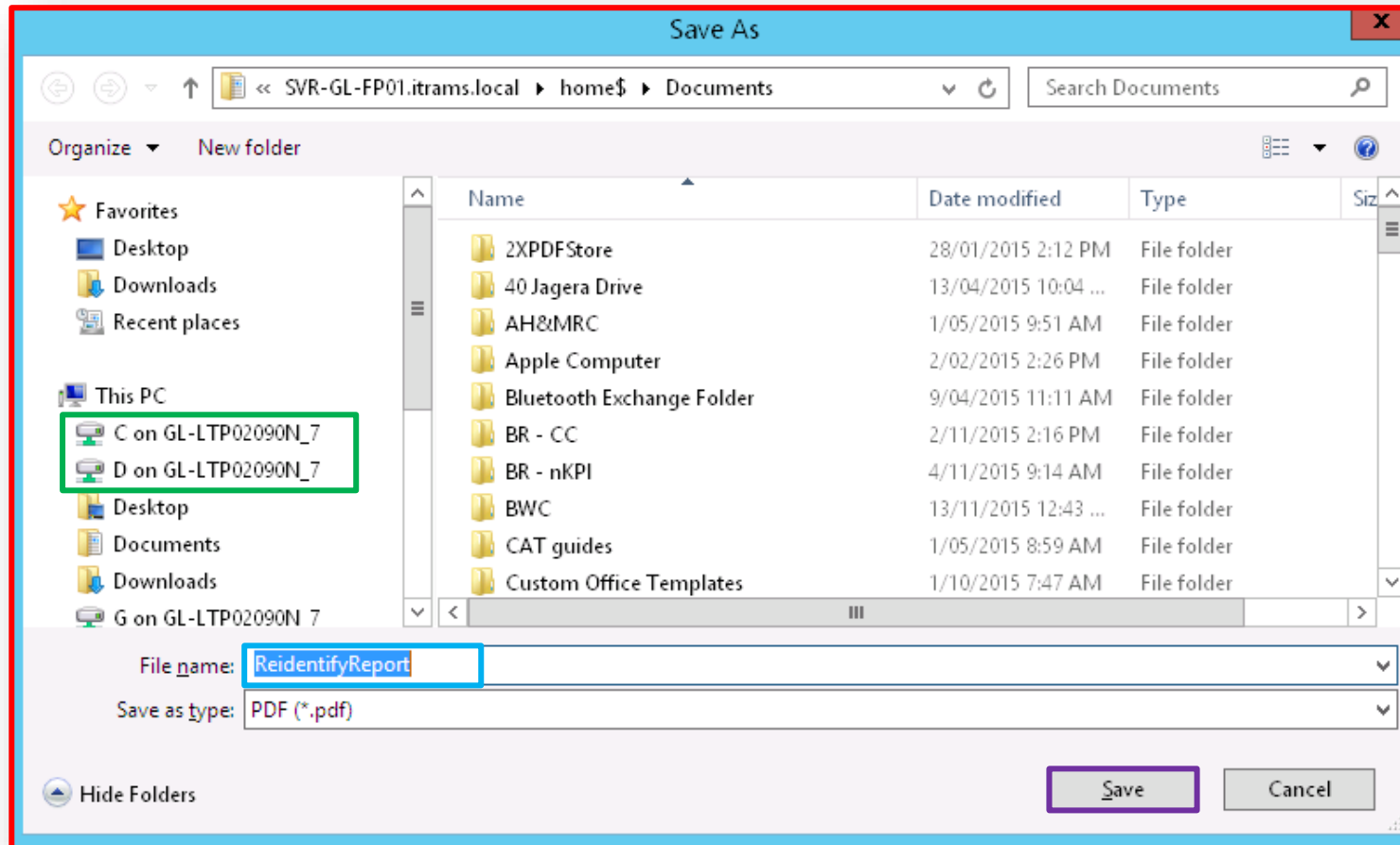


A screenshot of the 'Patient Reidentification' software interface showing a data table. The window title is 'Patient Reidentification'. The main area shows 'Reidentify Report [patient count = 2882]' and 'Selected: Allergies (NKA)'. The table has columns: ID, Surname, First Name, Known As, Sex, D.O.B, Address, City, and Postcode. The data rows show patient information. At the bottom, there are buttons for 'Refine Selection', a dropdown menu for 'Add/Withdraw Patient Consent for Sharing Data', and 'Go' and 'OK' buttons.

ID	Surname	First Name	Known As	Sex	D.O.B	Address	City	Postcode
				F	36			9999
				M	13			9999
				M	47			9999
				F	51			9999
				F	19			9999
				M	13			9999
				M	61			9999
				F	8			9999
				F	56			9999
				F	48			9999
				M	14			9999
				F	10			9999
				M	46			9999

CAT4 Getting Started

This will open the **Save As** window where you can select a location to save your report.



Please take note when saving your report to ensure you are saving it to your PC and not the server. Any drives on your PC will have your PC **host name recorded** against it. In the screen capture above, my PC host name is **GL-LTP02090N_7**

Once you are sure of your save location and have given the report a **meaningful title**, click **Save**.