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.)
3. Once open, you will be on the CAT4 dashboard which has options upon how you open the CAT4, Useful Links & Support contacts.
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 – 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.
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**.
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.
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.
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 number in the center is the Total population @ that point in time.
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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](#).
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.
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.
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.
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.
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.

You can also select segments by clicking on corresponding colored box.
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.

You can Export as Excel, PDF or Word.
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-LTP0209N_7**

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