CAT PLUS GUIDES
CAT PLUS PROMPTS

Date: Mar 11, 2019 2:32 PM

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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.

1 CAT4

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.

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.

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.

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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.
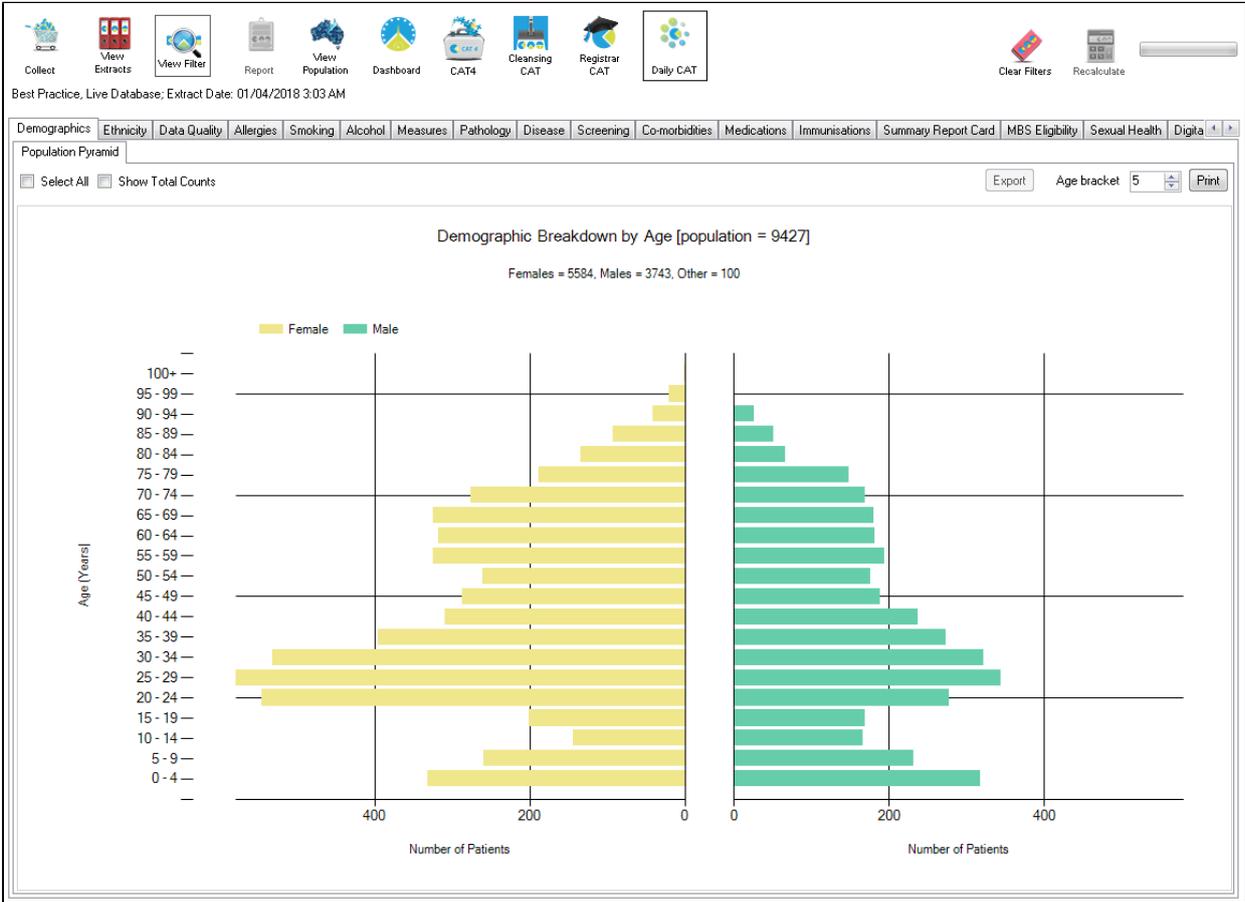
The reports available for prompts are:

Demographics

Ethnicity

Data Quality (CDSA)

Allergies

Smoking

Alcohol

Measures

Pathology

Disease

Screening

Co-morbidities

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:
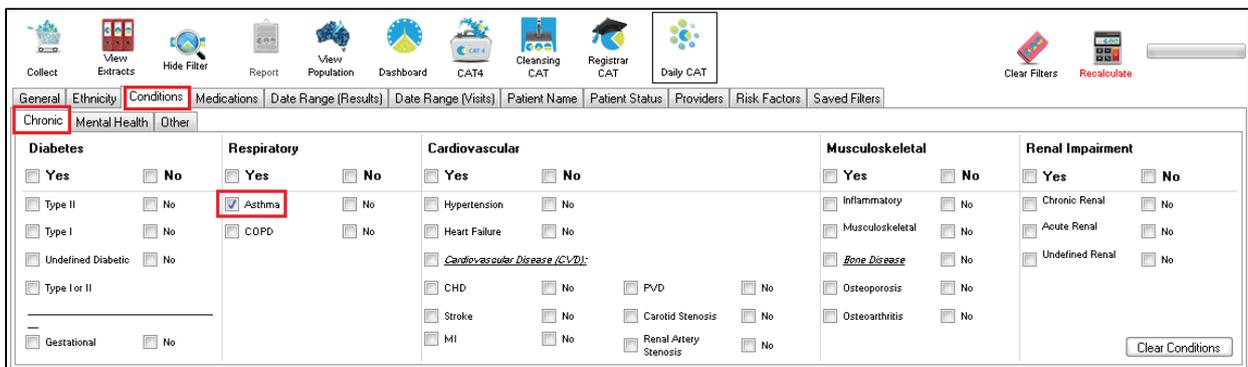
Then we add 'Smoking' from the risk factor tab and click on the 'Recalculate' button to apply the filter:
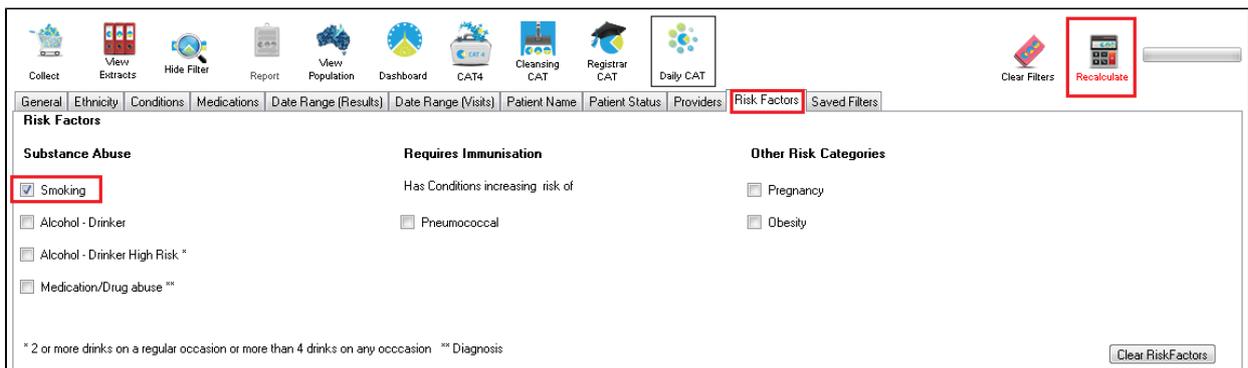
Now we need to select only those patients with no spirometry results. This is done on the Measures/Spirometry report tab. As this is only an example, please remember that you can select multiple parts of one or more graphs to create the conditions for a CAT Prompt.
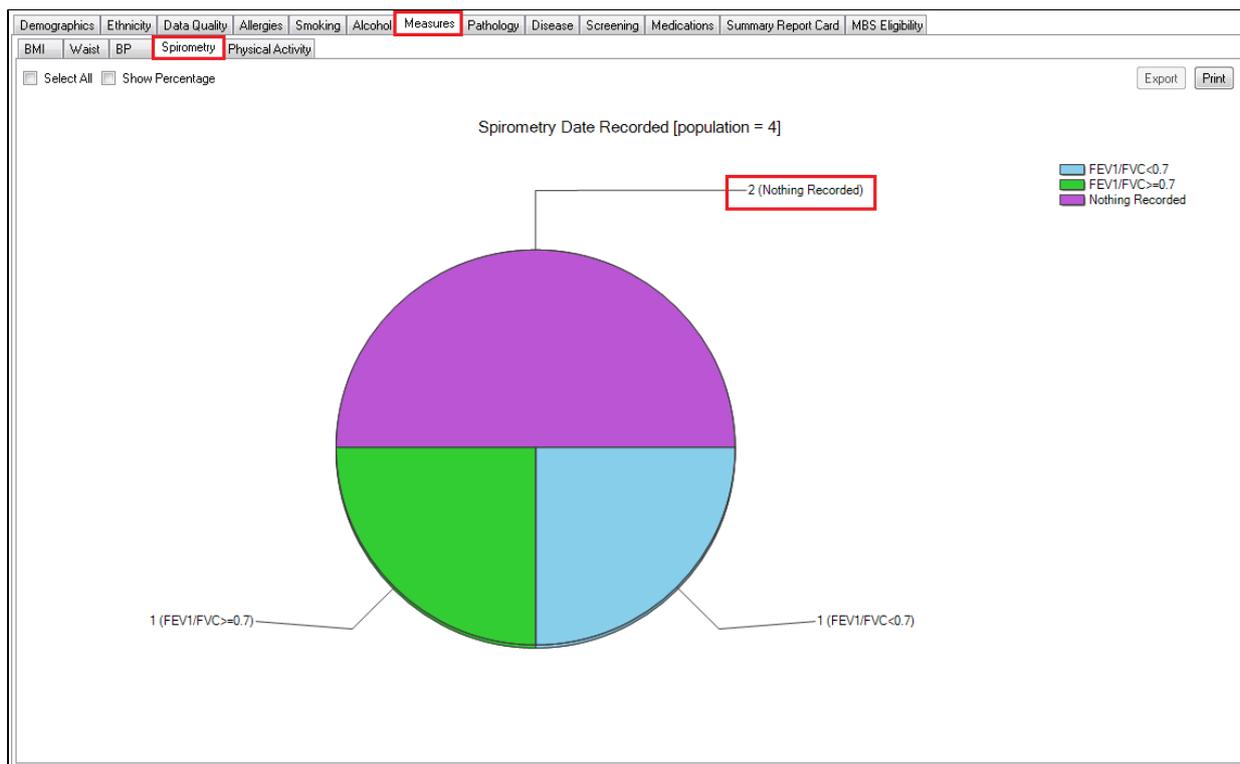
In this example, only two patients meet the chosen criteria. If any new patients are registered in the clinical system meeting the same criteria in the future, or existing patients are diagnosed with Asthma or start smoking, the created prompt will also apply to them as it is purely about matching the 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.

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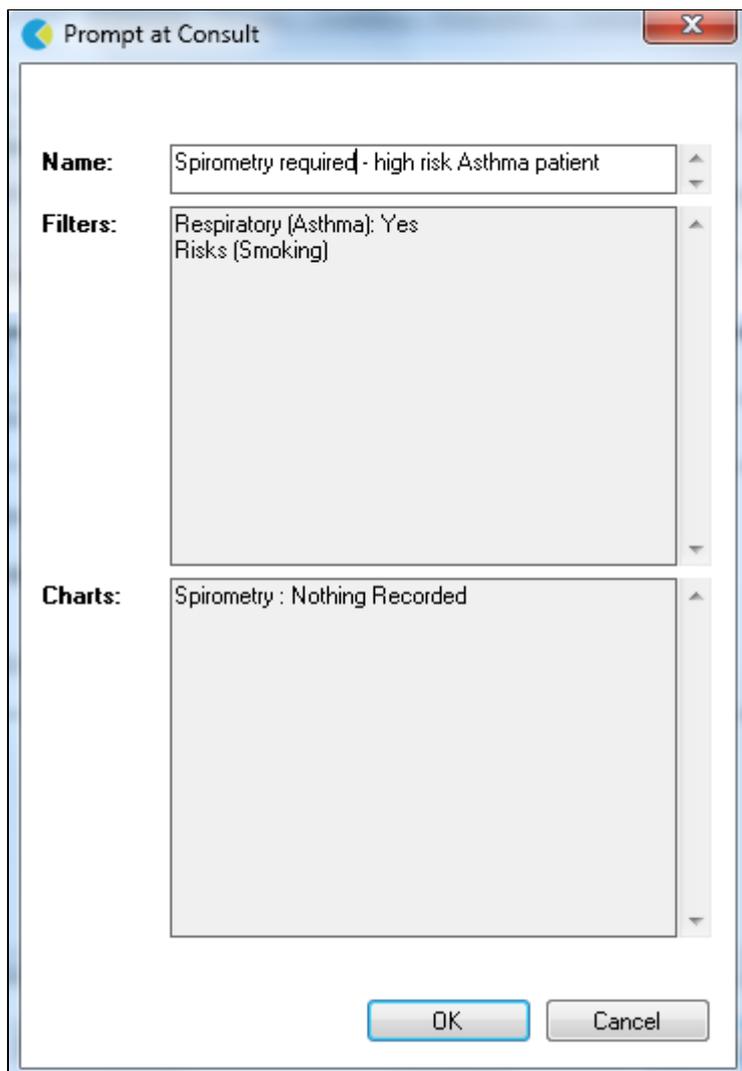
The above is only an example of a prompt, any filter and graph selection combination on the 'Daily View' in CAT4 can be used to create prompts. Please keep in mind that Topbar already prompts for missing demographic and clinical data, so additional prompts for a missing allergy status wouldn't be necessary.

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.
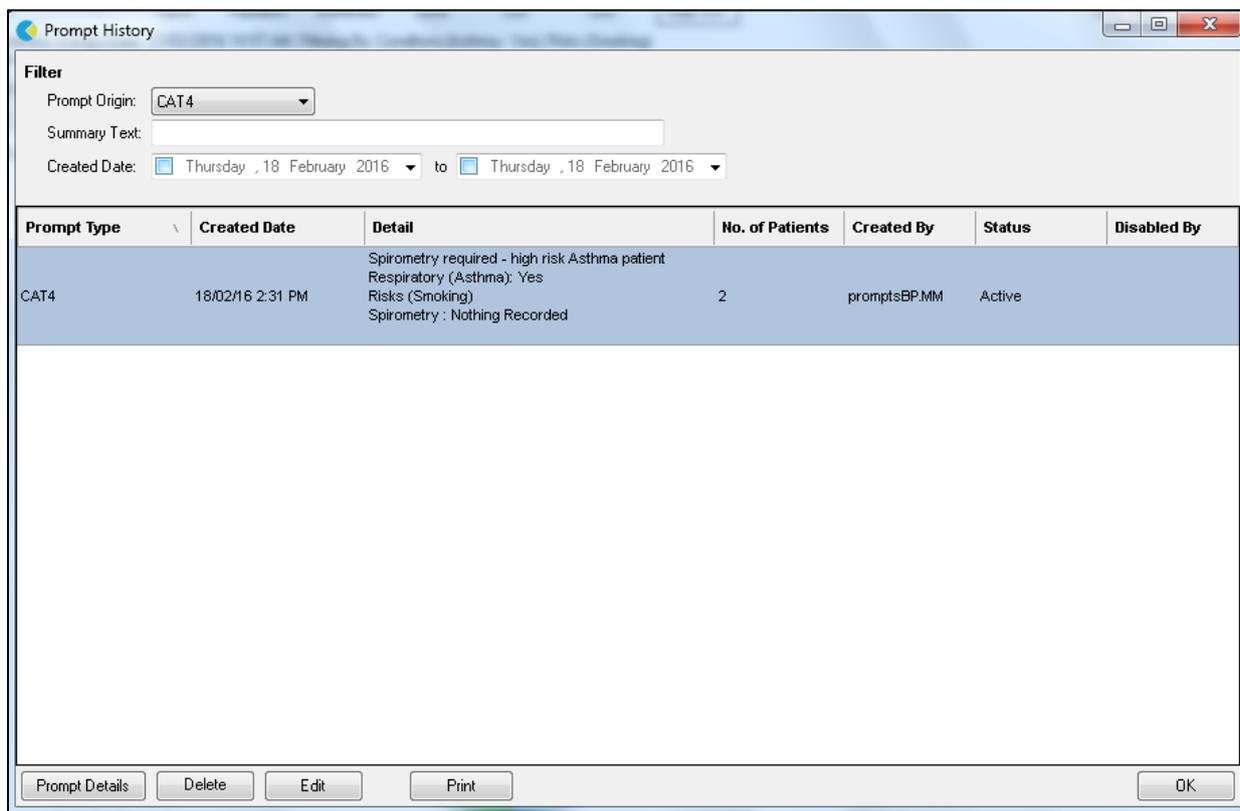
The buttons on the bottom of the window all you to see the details of the prompt including which patients matching the prompt criteria have been opened in the clinical system. Clicking on the 'Prompt Details' button will display the list of patients - this list is updated as more patients matching the prompt are opened and will take all Topbar users at the clinic into account.
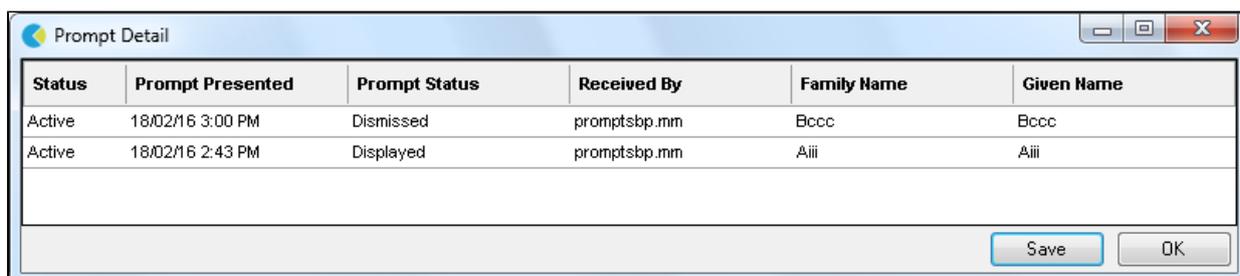
The 'Received By' column will show the Topbar user at the clinic who opened the patient in their clinical system and the status will show if the prompt has been displayed, dismissed or deferred.

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 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 organsiation 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 CAT page.

Before you create your prompt you need to consider if you need to apply a filter to your PAT CAT population. One consideration for the filter, asides 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. For more details on filters in PAT CAT please see the relevant chapter in the PAT CAT user guide.

To create a new prompt, click on the '+Create Prompt' button on the top left of the window.

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/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
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: Active

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

💾 Save

For this example I am creating a prompt that will alert Topbar users at the specified clinic if a patient with 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.

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.

⊘	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 on how to activate/inactivate prompts on the clinic level.

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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: 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 prompts

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

- > ☐ 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**

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3 Topbar

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.

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.

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.
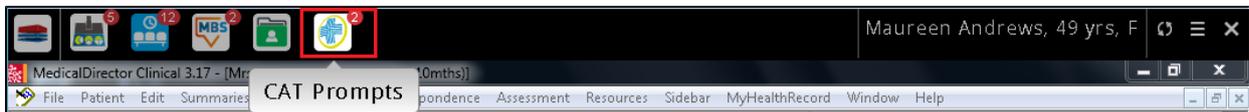
To open the CAT Prompts App click on 'cat plus prompts' in Topbar to display the full screen. Prompts displayed for the patient are labeled according to the name given to the prompt when created, and also show which software was used to create the prompt. In the example below we can see the same prompt originating once from PAT CAT and once from CAT4.

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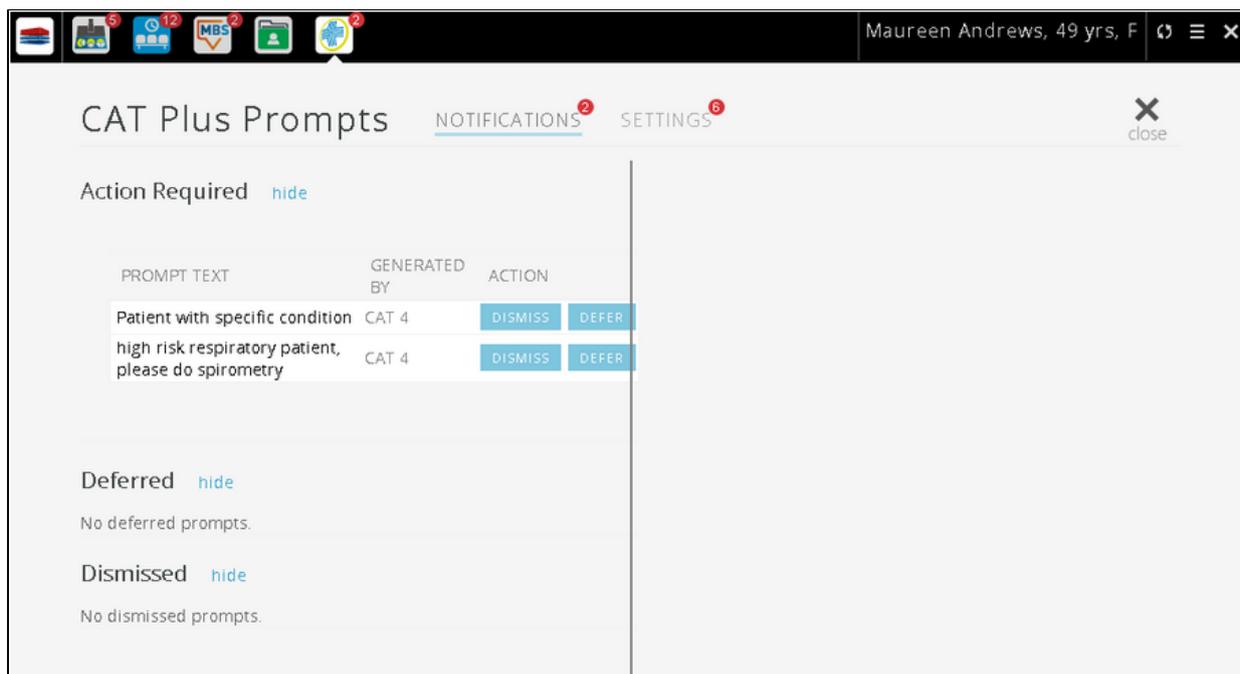
Clicking on the prompt will display further details as shown below. The details show the reason entered when the prompt was created and which reports and/or filters were used. For prompts originating in PAT CAT the organisation who created the prompt is shown along with the date and time. Prompts created 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 is a daily smoker so the 'Daily' is displayed for the 'Smoking' report.
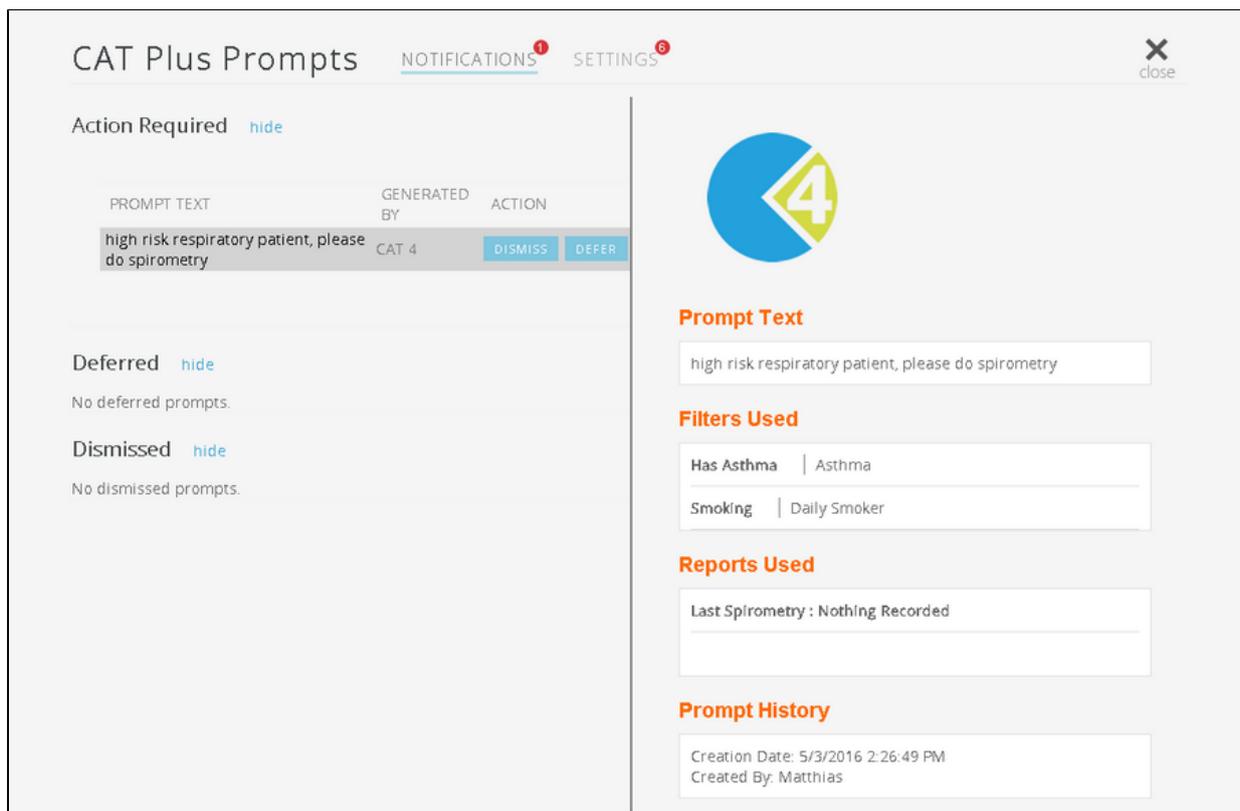
The prompt(s) will disappear when the patient doesn't meet the criteria specified in the prompt criteria any more. In the example above there are a number of possibilities:

- the patient's smoking status is updated to 'non-smoker'
- the patient's history is updated and Asthma is made 'non-active'
- a spirometry result is entered

Any one of the changes above 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 PAT CAT prompts 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.

Dismissed or deferred CAT4 prompts 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.

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.

> ⊘ 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.

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

To access the settings click on the 'SETTINGS' tab in the cat plus prompts app screen. Existing prompts are displayed sorted by origin, CAT4 prompts first then PAT CAT prompts.

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

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.

⊙ 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.