cdm//et

cdmNet Desktop

Setup guide for downloading documents from cdmNet

Version 4.2.0

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1. Overview

Precedence Health Care has developed cdmNet Desktop to facilitate effective use of the cdmNet system.

cdmNet is an online service that supports management of chronic conditions in primary care, by acting as a conduit for collaboration between health care providers. cdmNet allows General Practice staff to create, view and manage GP Management Plans and Team Care Arrangements. It also allows other members of the care team, including the patient, to access care plan details and collaborate in the care planning process.

This document outlines how to set up and use the Download Documents feature for your clinical desktop software (Best Practice, Zedmed or Medical Director 3).

The Download Documents feature allows you to download the documents associated with the patient's cdmNet health record, and imported them automatically into the patient's desktop record.

For technical support related to cdmNet Desktop or cdmNet, please visit <u>cdm.net.au/help</u>.

Please note that (at the time of writing) the download documents feature is not compatible with Monet.

2. Setting Up for Medical Director

Step 1

Create a folder somewhere on your computer with 'cdmNet' in its name; for example, 'cdmNet Documents'. This is where the downloaded documents will be stored temporarily before they are imported by Medical Director.

Step 2

Close or minimise all patients and select the Tools menu at the top of Medical Director. Select Manage Communications....

😁 Me	dical [)irector 3.	14d					
Open	File	Patient	User	Tools Clinical Correspond	nce Search	Resources	Help	
				Letter Writer			F8	
				Labels				
				X-ray View Screen		Ctr	+Shift+X	
				Calculators			۱.	
				Medicare Australia PKI C	rtificate Mana	ger		
				Options				
				Print Options				
				Manage Communication	s			
				MDExchange			+	
				Patient Photo Options				

Step 3

In the General tab, the Automatic Import Interval is (by default) set to 10 minutes. This is the period of time it may take before Medical Director imports documents downloaded by cdmNet Desktop. It is up to you whether you would prefer to keep this setting or change it to a shorter interval, for example 2 minutes.



🙌 Manag	e Communications					
General	Setup Data Transfer	Advanced Pathology	Message Tracking			
Import	t Configuration				-Recognised File	Extensions
Auto	Import Database	HCN Live Data 10 minutes 5 minutes 10 minutes 20 minutes 30 minutes 30 minutes 1 hour 2 hours 3 hours 4 hours 5 hours 6 hours 7 hours 8 hours		•	CPL CQP GRI HMP HSM MPS ORU PIT QML RUS SDS SNP SPX TRN	* *
						Close

Select the Setup Data Transfer tab.

General Setup Data Transfer Advanced Pathology Message Tracking											
Filter by Category All											
Description	Category 4	Import Folder	Export Folder	SDI	Manual	ACK	Global	ł			
MD Files	docs	C:\Users\Chathu Na	C:\Users\Chathu Na								
MD Directory	Standard	C:\Program Files\He	C:\Program Files\He								
MD Messages	Standard	C:\Program Files\He	C:\Program Files\He	~			Γ				
MDX	Standard	C:\ProgramData\MD	C:\ProgramData\MD	~	V	~					



Click Add. In the Description text box, add a description such as 'cdmNet Documents'. In the Category text box, add a category you feel is appropriate. In the Import Folder field, click the ... button to find and select the folder created in Step 1. Use the same folder for the Export Folder field. Tick both the Automatic Import Enabled (SDI) box and the Manual Import Enabled (Manual) box. Click OK.

Manage Comm	unications		23							
General Setup Data Transfer Advanced Pathology Message Tracking										
Filter by Category All										
Description	科 Setup Data 1	Transfer Details	obal							
MD Files cdmNet Docume	Description	cdmNet Documents								
MD Directory	Category	Documents								
MD Messages	Import Folder	C:\Users\Rachel\Desktop\cdmnet Documents\								
MDX	Export Folder	C:\Users\Rachel\Desktop\cdmnet Documents\								
		Automatic Import Enabled (SDI)								
		Manual Import Enabled (Manual)								
		Generate Acknowledgement (ACK)								
		Available Network Wide (Global)								
		OK Cancel								
HealthLink Inter	face File Path	Refresh HealthLink Import F	Path(s)							
Add	Edit	Delete	Close							

Close the Manage Communications window once you are happy with the settings (saving changes when prompted).

Step 5

Open a patient in Medical Director. You can now choose Download documents from the cdmNet Desktop menu for any patients who have documents in cdmNet.



Patient : Gabriel Celeste	
Gender : Male	
Born : 01-Jan-2001	
Check status	
Update health record	
Go to health record	
Download documents	
	-

By default, all documents on the patient's cdmNet health record are selected for download. Click Download to download the selected documents.

A Patient Documents			×
Gabriel CELESTE	Bom: 1-Jan-2001 (13	3 years) Gender:	Male
Select the documents you want to download.			
✓ 🗹 Current Care Plan			
Name	Created Date	Approved Date	•
Current Care Plan			=
Patient Summary			-
V 🛛 Approved Care Plans			
Name	Created Date	Approved Date	
GP Management Plan (721)	01/08/2013 3:5	55 PM 01/08/2013 3:5	6 PM
		Download Cance	el

cdmNet Documents Download							
Down	loading patient documents						

Within the period you chose in Step 3, Medical Director automatically imports the documents to the holding file. Close all patients, select Correspondence from the menu bar and then Check holding file...



😁 Medical Director 3.14d - [Isara Gunther]		
≫ File Patient Edit Summaries Tools Clinical	Correspondence Assessment Resources PCEHR	Window Help
👍 🗕 R. 🧭 🗭 💷 🥙 🌩 🕼 🕅 🏹 🌾 (Check Holding File F5	🍦 🖴 🙁 🗍
Isara Gunther	Outstanding Requests	
4 Bruhl Road, Melhoume, Vic. 3000	Actioned Items (All Patients)	IHI No:
Allergies: Nil known	Cytology Request Imaging Request	ATSI: Neither

Medical Director prompts you to select the practitioner for whom you wish to view the documents.

Check Holding File
Select Practitioner(s)
All Practitioners DR BOB BLACK DR PRE CEDENCE
OK Cancel

Here, you will find all relevant documents and can select an appropriate action for each document.



	 Full Preview Clear 	ar Filter Mo	ve Location Doo	cument Details Scan + Import +	Print List Print Delete Refresh							
l of 11 records found							Select					
Date Collected 💌	Date Requested 💌	Result 🗨	Patient 💌	Subject 🗨	Description	Doctor 💌	Provid					
1/03/2013	21/03/2013		Gunther, Welkin	TCA	TCA	DR PRE CEDENCE	cdmNe					
1/03/2013	21/03/2013		Gunther, Welkin	PATIENT SUMMARY	PATIENT SUMMARY	DR PRE CEDENCE	cdmNe					
1/03/2013	21/03/2013		GUNTHER, WELKIN	GPMP	GPMP	DR PRE CEDENCE	cdmNe					
1/03/2013	21/03/2013		GUNTHER, WELKIN	CARE PLAN	CARE PLAN	DR PRE CEDENCE	cdmNe					
1/03/2013	21/03/2013		GUNTHER, WELKIN	ALLIED HEALTH REFERRAL FORM	ALLIED HEALTH REFERRAL FORM	DR PRE CEDENCE	cdmNe					
1/03/2013	21/03/2013		gunther, Welkin	ALLIED HEALTH REFERRAL FORM	ALLIED HEALTH REFERRAL FORM	DR PRE CEDENCE	cdmNe					
1/03/2013	21/03/2013		gunther, Welkin	ALLIED HEALTH REFERRAL FORM	ALLIED HEALTH REFERRAL FORM	DR PRE CEDENCE	cdmNe					
1/03/2013	21/03/2013		GUNTHER, WELKIN	ALLIED HEALTH REFERRAL FORM	ALLIED HEALTH REFERRAL FORM	DR PRE CEDENCE	cdmNe					
1/03/2013	21/03/2013		GUNTHER, WELKIN	ALLIED HEALTH REFERRAL FORM	ALLIED HEALTH REFERRAL FORM	DR PRE CEDENCE	cdmNe					
							÷.					
Zoom Page Width	• Open Externa	Zoom Page Width • Open Externally View PDF View RTF										
Zoom Page Width	• Vpen Externa	Ily View PC	F View RTF	rangement (MBS	cd	m/let						
Coom Page Width	• • Open Externa	Ily View P[F View RTF	rangement (MBS	c d S Item No. 723) ^{n Care}	m/let						
Zoom Page Width	• Open Externa	Ily View PC	F View RTF	rangement (MBS rated by Precedence Health Net website for the latest ver	C d 5 Item No. 723) a Care rsion of this document	m/et						

If you do not see the documents you were expecting to see, you can force the download by closing all patients, clicking Correspondence in the menu bar and then selecting Download.

📔 Me	📔 Medical Director 3.14d											
Open	File	Patient	User	Tools	Clinical	Correspondence	Search	Resources	Help			
						Check Hold	ing File	F5				
						Download		F4				
						Outstanding	Requests	5				
						Actioned Ite	ms					

Step 6

Once you have chosen an action for these documents, they appear in the Results tab of your patient's Medical Director record.

😁 Medical Directo	r 3.14d - [Isara Gunther]							- da - X
⋟ File Patient	Edit Summaries Too	ls Clinical Corresp	ondence Assessment Re	sources PCEHR Wind	low Help			_ 8 ×
🖶 🗕 R. 🤻	🕉 🗈 🥐 🌩 🕼 🥖	N 🖺 🤅 (🕴 🛙 🕅	🗏 🞯 🗭 📢 🐘 🤅	🕱 🍋 🖨 📂 🎙 🗉	3 🕅		Go MDReference	
Isara Gunther		▼ DOB: 05/06/19	86 26 yrs Occupati	on: Engineer		1m 54s 📗		
4 Bruhl Road. Melbo	ume. Vic 3000	Ph:	Record N	lo: IHI	No:			No Photo
Allergies: Nil know	n		Pension I	No: ATS	61: Neither Aboriginal no	or Torres Strait Islan	der	17
			- Smoking	Hx: Never smoked				
Wamings:				÷	Recalls			
ę.	Pap Test		Obstetric	Correspo	ondence		MDExchan	ige
E Draview Rettor	P = Eull Draview Cla	Progress	Past history	E Results E	Letters Delete Pefresh	Add Pocult	Old scripts /	lmm.
A of A records found			ion Document Details 3	can • Import • Pri	nt Delete Refresh	Add Kesult 5	earcn Clear Search	Select All
4 of 4 records round								<u>Select All</u>
Date Checked	Checked By	Date Collected	Date Requested	Sender/Provider	Recipient/Doctor	Subject 💌	Description	Notation
19/12/2012	DR PRE CEDENCE	19/12/2012	19/12/2012	cdmNet	DR PRE CEDENCE	GPMP REVIEW	GPMP REVIEW	No action
19/12/2012	DR PRE CEDENCE	19/12/2012	19/12/2012	cdmNet	DR PRE CEDENCE	DENTAL REFERRAL FORM	DENTAL REFERRAL FORM	No action
21/03/2013	DR PRE CEDENCE	21/03/2013	21/03/2013	cdmNet	DR PRE CEDENCE	TCA REVIEW	TCA REVIEW	No action
21/03/2013	DR PRE CEDENCE	21/03/2013	21/03/2013	cdmNet	DR PRE CEDENCE	TCA	TCA	No action
•		m						Þ.
Zoom Dage Wi	dth • Onen Externa	New PDF View	RTF	d Cumulative Results	Edit Action Add P	ecall Drint Vi	au Signatura Aud	it History
HCN	2 Help	Previous	Neassign Patient Notifie		Luit Action Add R		stom #1 Cust	tom #2
	b							

For further information, see the Medical Director 3 documentation.

3. Setting Up for Best Practice

Step 1

Create a folder somewhere on your computer with 'cdmNet' in its name; for example, 'cdmNet Documents'. This is where the downloaded documents will be stored temporarily before they are imported by Best Practice.

Step 2

Close or minimise all patients and select the Setup menu at the top of Best Practice. Select Configuration. If your user account does not have appropriate permission you may need to talk to your IT department about access.



Step 3

Select Results Import. Next to the Report file search paths box, click Add and find the folder you created in Step 1. Ensure that the Import investigation reports on this computer box is ticked. Click Save when you are happy with the settings.



🚶 Configuration		—
General	 Import investigation reports on this computer Don't allow unallocated reports into Inbox Add header to incoming letters Report file search paths: 	Set storage locations
Results import	C:\Documents and Settings\Administrator\Desktop\doscdmNet	Add
Lists Reminders	Report file extensions: Acknowledgements: CPL Add Facility ACK path CQP GRI HL7 HLK HMP HSM MPS	Add Edit Remove
Care plans	Number of months to display in Investigation reports list: 1 Number of months to display in Inbox follow up list: 12 Save	Cancel

You can now choose Download documents from the cdmNet Desktop menu for any patients who have documents in cdmNet. Within 5 minutes, Best Practice automatically imports the documents to the holding file.

Patient : Gabriel Celeste	
Gender : Male	
Born : 01-Jan-2001	
Check status	
Update health record	
Go to health record	
Download documents	

By default, all documents on the patient's cdmNet health record are selected for download. Click Download to download the selected documents.



🔁 Patient Documents		×	
Gabriel CELESTE	Bom: 1-Jan-2001 (13)	years) Gender: Male	
Select the documents you want to download.			
V 🔽 Current Care Plan			
Name	Created Date	Approved Date	
Current Care Plan		=	
Patient Summary			
✓ ☑ Approved Care Plans			-
Name	Created Date	Approved Date	
GP Management Plan (721)	01/08/2013 3:55	PM 01/08/2013 3:56 PM	
	Do	wnload Cancel	

cdmNet Documents Download							
Downloading patient documents							

With the patient still open, select the Clinical menu, and select Unchecked reports. Click the inbox icon and choose the inbox. Set an appropriate action for each document that appears and click Finish.

💁 Vincent Law			
File Open Request Clin	nical View Devices Help		
Name: Vincent La Address: 1 Ergo Pla Medicare No: Occupation:	Asthma action plan BMI Ceased Rx Blood pressure Cardiovascular risk Diabater rick	Shift+F3) M & 2/04/1989 .
Allergies / Adverse Drug	Observations Gestational age INR Manager	Alt+F3 Alt+F4 Alt+F5	s: Due 08/04
Expand Col	K10 Assessment Mini Mental State Examination Metric conversion Renal function		08/04 nt's birthday or /iew
Uncent Law Today's	Respiratory function Travel medicine Geriatric Depression Assessment Edinburgh PND Scale	Alt+F12	est name
Past his	Percentile charts Physical activity prescription	Ctrl+F8	
	Unchecked reports	Alt+F11	

Step 6

The documents appear in the Investigation Reports of your patient's Best Practice record.





🐉 Pino Chan						
File Open Request Clinical View Devices Help						
I 🖲 🖺 🚱 🗊 🗋 🔒 📓	🤭 🎄 🤶 🌑 📶 🕭 🚬 📑 🖡 Family	members: Pino Chan 🔹 Jump Open				
Name: Pino Chan	D.O.B.: 09/12/2004 Age: 8 yrs Sex: Female	2m 42s 🚺 🕨 Finalise visit				
Address: 3 Ergo Place Melbourne 3000	Phone: Mobile:	Work:				
Medicare No: Record No.:	Pension No.: Comment:					
Occupation:	Tobacco: Alcohol:	Elite sports: Ethnicity:				
Blood Group:						
Allergies / Adverse Drug Reactions: Reactions	Actions/Reminders:	Preventive Health Actions Reminders				
Item Reaction Severity	Type Due Reason					
Japanese Encephalitis Vaccine Rash Mild	Preventive health 08/04/2013 Influenza vaccination sh Discussion health 08/04/2013 A Medianting Review sh	ould be considered				
	Preventive health 08/04/2013 A Medication Review sh Preventive health 08/04/2013 A Diabetes Cycle of Car	oura be considered!				
Expand Collapse	Add View Delete Print	< Previous Next >				
🖃 🖳 Pino Chan 🔶	Checked by Dr Pre Cedence on 24/12/2012	 Mark result as given 				
Today's notes	Action: No action.	Ψ.				
Past visits	🔲 View 🗸					
	🛛 📕 Zoom: 86 🔹 🔍 🔍 🔍 🕎 🕎 🔜 🖬 🗊	🛺 📑 📄 📄 Page: 1 🔹 < > 💕				
🖃 🦉 Past history 🗉		<u>۸</u>				
- > Active						
Diabetes Mellitus, Type 1		cdm//et				
Inactive		/—				
Immunisations	GP Management Plan Re	view (MBS Item No. 732)				
	Generated by Prece	dence Health Care				
	Please visit the cdmNet website for	Please visit the cdmNet website for the latest version of this document				
Care Pian 19/12/2012	valid from 19-Dec-2012. Reviewed on 19	-Dec-2012. Next review on 19-Jun-2013.				
	Patient Details	Date of Birth				
— Patient Summary 19/12/2012	Pino Chan	12-Sep-2004				
	Contact Information	Medicare Number				
Care Plan 21/12/2012	3 Erao Place. Melbourne. Victoria. 3000	None Recorded				
Currently logged in: Dr Pre Cedence		Monday 08/04/2013 11:26:03 AM				
< III		F. F				

For further information, see the Best Practice documentation.



4. Setting Up for Zedmed

Step 1

cdmNet Desktop sets up the functionality of this feature in Zedmed automatically. No extra settings are required in order for the documents to be downloaded.

Patient : Gabriel Celeste
Gender : Male
Born : 01-Jan-2001
Check status
Update health record
Go to health record
Download documents

🔁 Patient Documents			×
Gabriel CELESTE	Bom: 1-Jan-2001 (13)	/ears) Gender:	Male
Select the documents you want to download.			
V 🗹 Current Care Plan			
Name	Created Date	Approved Date	•
Current Care Plan			=
Patient Summary			-
✓ ✓ Approved Care Plans			
Name	Created Date	Approved Date	
GP Management Plan (721)	01/08/2013 3:55	PM 01/08/2013 3:5	6 PM
	Do	wnload Canc	el

Step 2

You can choose Download documents from the cdmNet Desktop menu for any patients who have documents in cdmNet.

cdmNet Documents Download							
Downloading patient documents							



By default, all documents on the patient's cdmNet health record are selected for download. Click Download to download the selected documents.

Step 3

With the patient health record still open in Zedmed, select the Results menu and click Import Laboratory Results.

🛟 Zedme	d Clinic	al 👘							
File Enco	unter	Results	Reference	Voice	Library	Reports	Tools	Utilities	Help
Open Patient		Im	port Laborato	ory Resu	lts	Ctrl+F6	4	2	
		Re	sults Inbox			F6	Result	s Inbox	Scan
Cartwright	t, Melir	Οι	itbox Viewer						
		D	etails						

Step 4

The imported results appear. Click Close.



Step 5

Select the Results menu and click Results Inbox.



🐉 Zedmed Clinic	al							
File Encounter	Results	Reference	Voice	Library	Reports	Tools	Utilities	Help
2	Im	port Laborat	ory Result	s (Ctrl+F6	4	>	
Onen Patient	Re	sults Inbox			F6	Result	s Inhov	Scan
Cartwright, Melir	0.	tbox Viewer				Result	JIIDOX	Jean
	D	etails						

The downloaded documents appear where you can select the appropriate action for them.

🗶 Results Inhox															×	
Hesults																
Showing Records:(1 - 34 / 34) - 9	Sorted By Priority [Descer	nding]							<u> </u>	V	iew Res	ults Import Errors				
<u> </u>	🚹 🔊 🖨 🗞 Get Al	Il Results Patient	le User I	Roles		•	User	Jekyll, Dr	James (,	JEKYLL)	•	Type All		Page 100	•	
Patient	Assigned To Re	esult Reporte	d Date	Resu	It Collected	Date	× F	Result Type	Res	ult Descri	otion		Patient Notified	* Message	*	
0	Jekyll, DrJames (JJEK 05	5/02/2014		05/02	2/2014		Re	esult	Patie	nt Summ	ary		11			
0	Jekvil, DrJames (JJEK 05	5/02/2014		05/02	2/2014		Be	esult	Care	Plan			11			
ŏ	Jakull Dr. Jamas (LIEK 05	5/02/2014		05/03	2/2014		Be	e ult	GPM	Р						
Annual Mine	Dekyli, Droames (Joek 05	102/2014		03/02	2/2014			suit	CDM	n						
Mane, Misa	Doctor U4	1/02/2014		04/02	2/2014		не	esult	GEN	F			//			
Cartwright, Melina	Jekyll, DrJames (JJEK 06	5/02/2014		06/02	2/2014		Re	esult	Patie	nt Summ	ary		11		Ŧ	
•	III													•		
There are 34 results for <us< th=""><th>ser Roles> <jekvil. d<="" th=""><th>)r James</th><th>JJEK</th><th>YLL</th><th>> curren</th><th>tiv o</th><th>lispl</th><th>lavina re</th><th>ecord</th><th>s 1 - 34</th><th></th><th></th><th></th><th></th><th></th></jekvil.></th></us<>	ser Roles> <jekvil. d<="" th=""><th>)r James</th><th>JJEK</th><th>YLL</th><th>> curren</th><th>tiv o</th><th>lispl</th><th>lavina re</th><th>ecord</th><th>s 1 - 34</th><th></th><th></th><th></th><th></th><th></th></jekvil.>)r James	JJEK	YLL	> curren	tiv o	lispl	lavina re	ecord	s 1 - 34						
D Mr. D.A. Star			•	,		.,										
Result View Enhanced View																
	ad-101010-00-1582126577	,													^	
	comNet Number: 1562126577	comMet Number: 100/21/20077 Your odmNet care plan is available from http://www									varre is scoope	4.				
											1.					
										cd	m//e					
	Patient Goals and Tasks	for Sheldon Coo	nor — veli	d from 5-	Eeb-2014						'					
			Torest	-	100 2014		¥	atra								
	Achieve optimal health	Achieve online) health			Identified opais achieved				Voir raise main chiecthe							
	Development of a pain manage	Development of a pain management plan			Optimal pain management				nagement pi	in						
	Maintain healthy diet	Maintain healthy diet			Patient maintaining healthy diet											
	Maintain physical activity	Maintain physical activity			30 Minutes per day of selected exercise 5 days											
	Manage body weight	Manage body weight			Weight ≤ 95% of current Weight											
	Cease smoking	Cease smoking			Complete cessation and avoid secondhand smoke				фу			1				
		Consider additional Baranian														
	Consider additional therapies	Constant additional therapies Optimal treatment using comprementary therapies Use of comprementary therapies														
	Appointments Due (Please call provider and make appointment when due)															
	Provider	Feb Nor A	or May Jun	2014	Sec Oct Nov	Dec Ja	n Feb II	Mar Acc May J	2015 an Jul Au	Sec Oct N	ov Dec Ja					
	Adam SMith (Podistrist)											1				
	Dutterfield Enterprises (Diettian)					+	Ħ									
	Dr Pre Cedence (GP) 0407 123 905											1				
	Marshall Khel (Occupational Therapie	40 (P4										1				
	Amenda Pontiti (Nurse (Practice / Decisional / Doculeriti)											1				
	Renee Proctor (Renal Medicine /											1				
	Nephrologist)															
															-	
Result Navigation	Actions															
	Boutine	Irgent A	INK No	hifu M	lark Besult		Patier	nt II	ndate							
Eullscreen Prior Next	Appointment App	pointment	Patient		Complete		Notifie	ed F	esult		?	Help	Close			



5. For Further Information

For further information on cdmNet Desktop or cdmNet, please visit the Precedence Health Care website at precedencehealthcare.com.

For all support requests, please visit <u>cdm.net.au/help</u>.