



# cdmNet Desktop User Guide

Version 1.4.1

## Table of Contents

<b>Overview .....</b>	<b>2</b>
<b>Using cdmNet Desktop .....</b>	<b>3</b>
Practice Software .....	3
Reminders .....	3
Care Plan Recommendations .....	3
cdmNet Desktop Actions .....	4
Software Updates .....	10
<b>Appendix A – Installation and Configuration .....</b>	<b>11</b>
Prerequisites .....	11
Internet Connection .....	11
cdmNet Accounts .....	11
Practice Software Setup .....	11
Install and Configure cdmNet Desktop .....	14
Install and Configure for Terminal Services or Citrix .....	19
PrimaryCare Sidebar® .....	20
For Further Information .....	20

## 1. Overview

cdmNet Desktop has been developed by Precedence Health Care 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.

cdmNet Desktop provides General Practice staff with access to four key features:

- Review the status of existing patient care plans, with prompts for appropriate action
- Update and create new individualised care plans for patients
- Direct access to patient care plans from the General Practice clinical software
- Automatic reminders for actions that are appropriate to the patient's care plan.

This document is an installation and user guide for the cdmNet Desktop software, providing easy-to-follow steps for General Practice users.

For technical support related to cdmNet Desktop or cdmNet, please visit [cdm.net.au/help](http://cdm.net.au/help).

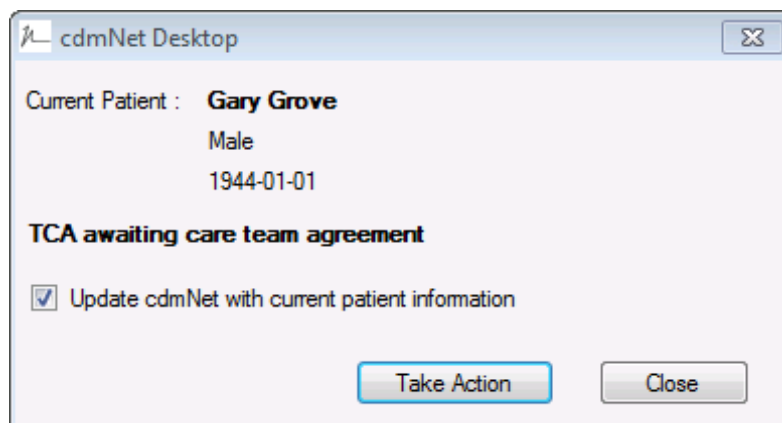
## 2. Using cdmNet Desktop

### 2.1. Practice Software

cdmNet Desktop currently supports two practice software applications: **Best Practice** and **Medical Director 3**. To use cdmNet Desktop, you must be logged in to your practice software, with a patient medical record open.

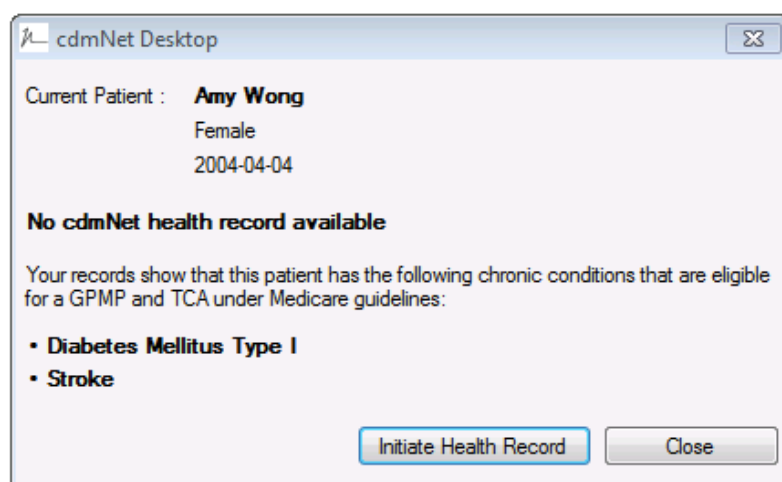
### 2.2. Reminders

Whenever a patient record is opened in your practice software, cdmNet Desktop checks to see if the patient's health record in cdmNet requires any action. If so, it displays a reminder, allowing you to take appropriate action if required.



### 2.3. Care Plan Recommendations

If a patient record is opened in your practice software, and it is detected that the patient has a chronic condition which can be supported by a cdmNet care plan, you will be alerted and given the option to initiate a health record.

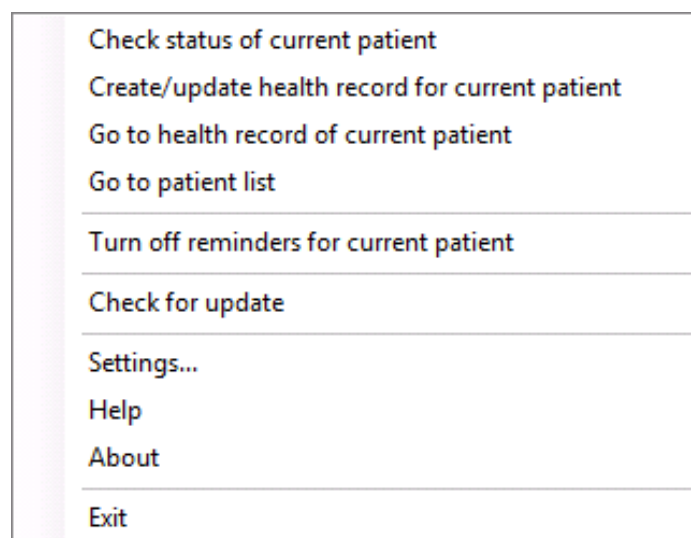


## 2.4. cdmNet Desktop Actions

cdmNet Desktop allows you to take actions by clicking the tray icon at the bottom right of your screen:



When a patient record is open in your practice software, cdmNet Desktop offers the following actions after clicking its icon.

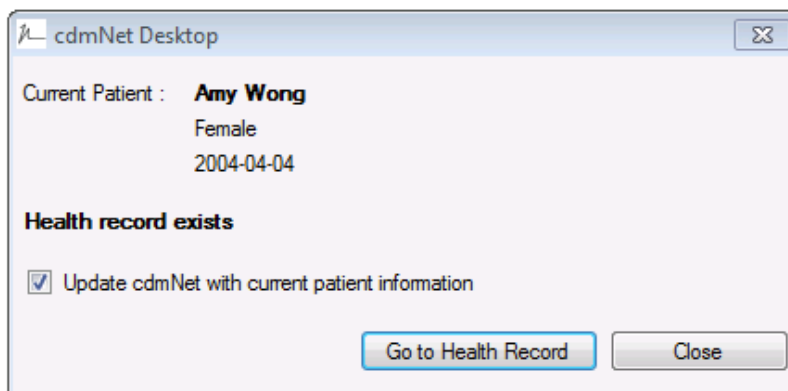


### *Check status of current patient*

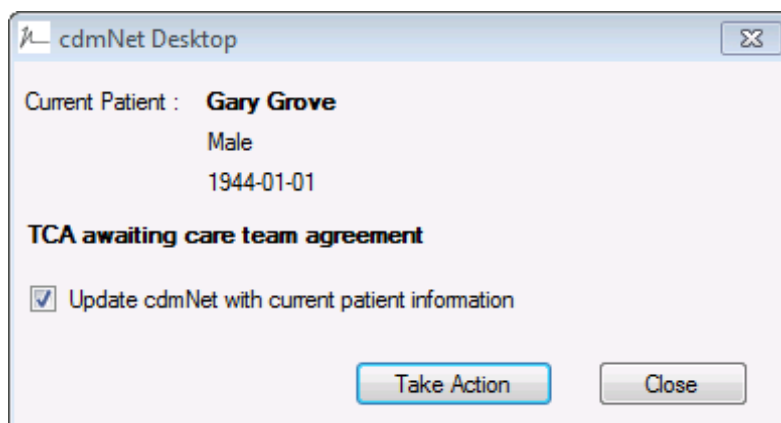
This action allows you to check the status in cdmNet of the current patient open in your practice software. cdmNet Desktop displays a window with the results of this action.

If the patient does not have a health record in cdmNet, cdmNet Desktop displays an error message.

If no action is required — for example, if the health record exists — you can go directly to the patient's health record in cdmNet by clicking **Go to health record of current patient**.



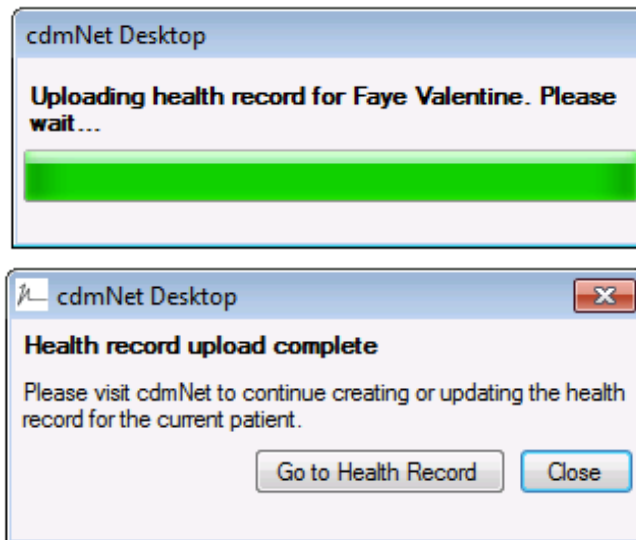
If the health record requires your action, click **Take Action**. cdmNet Desktop takes you directly to cdmNet where you can perform any necessary actions.



The **Update cdmNet with current patient information** check box is ticked by default. This ensures that any changes to the patient's clinical data in your practice software are updated in cdmNet whenever an action is taken.

### *Create/update health record for current patient*

This action allows you to start the process of creating a health record for the current patient. If the patient already has a health record, this action updates the patient's clinical data in the health record.



### *Go to health record of current patient*

This action takes you directly to the patient's health record in cdmNet. It does not update cdmNet with any changes that may have been made to the patient's clinical data in your practice software.

### *Go to patient list*

This action takes you directly to your patient list in cdmNet.

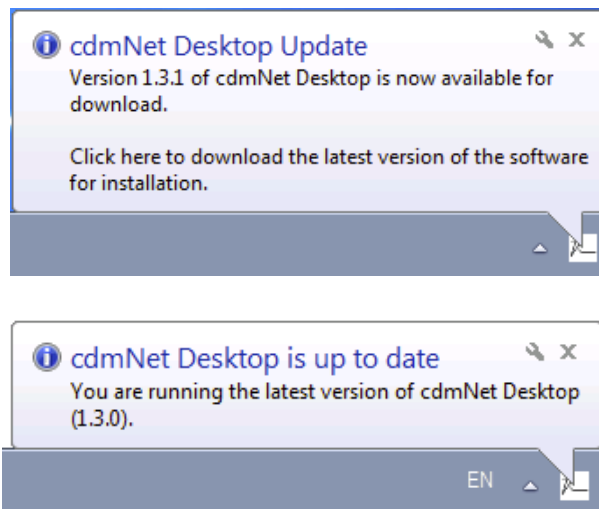
### *Turn off reminders for current patient*

By selecting this action, cdmNet desktop will no longer remind you about the patient currently open in your practice software. If you have already selected this option, cdmNet Desktop gives you the option to turn reminders for this patient back on instead.



### Check for update

This action checks if there is an update available to cdmNet Desktop. If an update is available, a balloon will be displayed that when clicked, will download the latest version of cdmNet Desktop. Otherwise you will be informed that you are running the latest version.

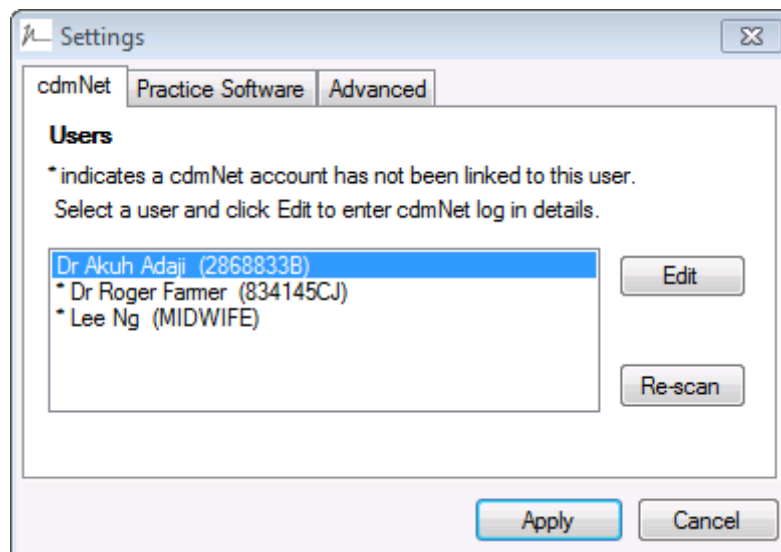


Updates are also checked automatically at regular intervals.

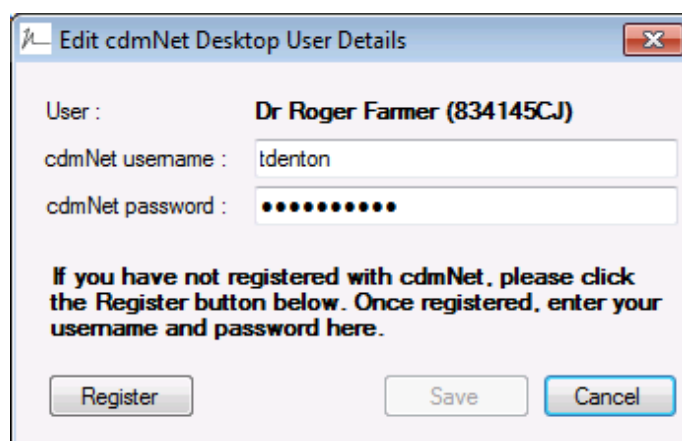
### Settings

The **Settings** action displays a window with three sections: **cdmNet**, **Practice Software** and **Advanced**.

**cdmNet:** The cdmNet section lets you specify the cdmNet username and password of cdmNet Desktop users.

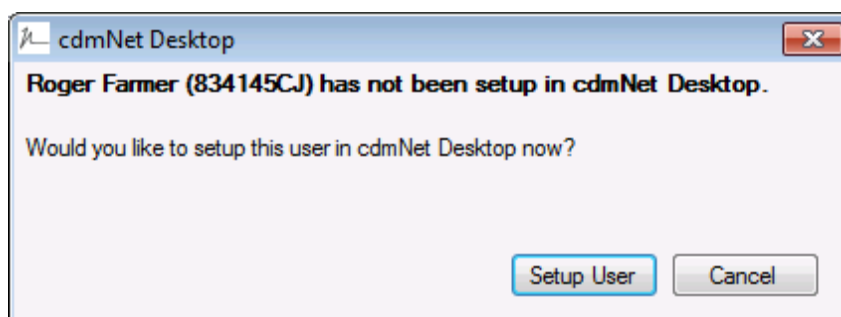


This screen lists every user account that exists in your chosen practice software. By selecting a user account and clicking **Edit**, you can enter the username and password for this user's corresponding account in cdmNet. You should do this for every person in your practice who will use the computer on which this copy of cdmNet Desktop is installed. If the user does not have a cdmNet account, they can create one by clicking **Register**. This will direct them to the cdmNet registration page.

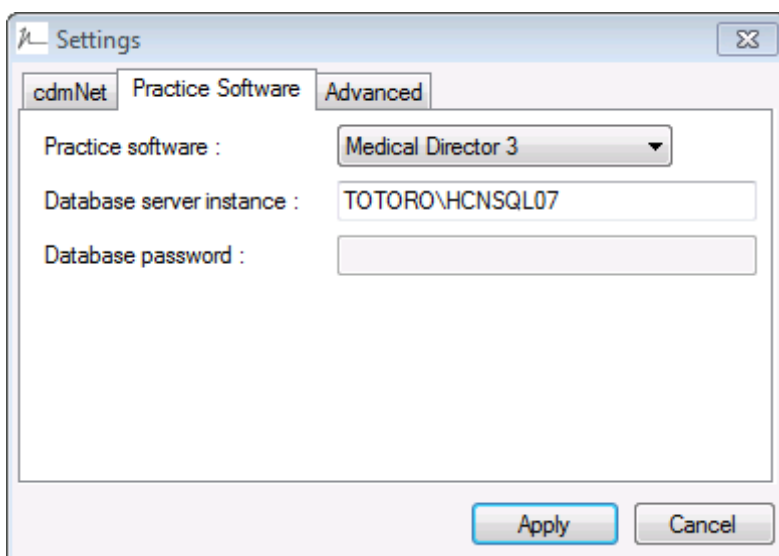
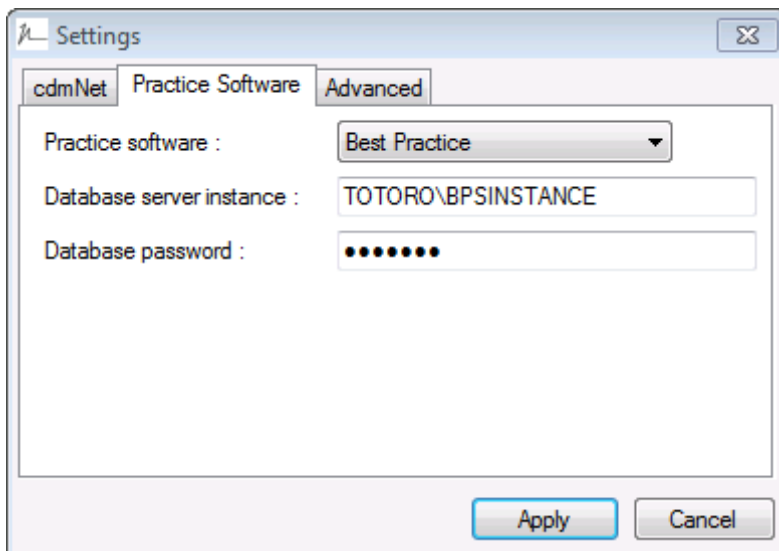


cdmNet Desktop automatically detects which user is currently logged into the practice software in order to use the appropriate cdmNet username and password.

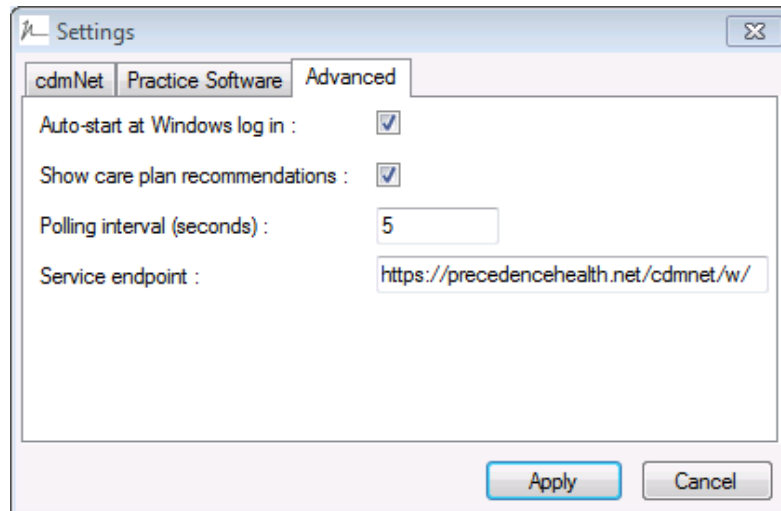
If the current practice software user does not have a cdmNet username and password entered (indicated by a \* in the settings), cdmNet Desktop asks you to set up the user when trying to interact with cdmNet.



**Practice Software:** The Practice Software section lets you choose the practice software you use, along with configuring any relevant database settings. See Appendix A for details on how to configure practice software database settings.

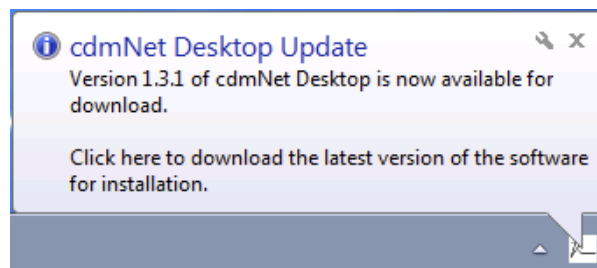


**Advanced:** You will generally not need to change the settings in the Advanced section. Your IT department or Precedence Health Care may ask you to change these settings if there are problems with your setup. See Appendix A for details on advanced configuration of cdmNet Desktop.



## 2.5. Software Updates

cdmNet Desktop periodically checks for new versions of the software. When a new version is available, it reminds you to update it as soon as possible.



Click the balloon to download the latest version of cdmNet Desktop. It is highly recommended that you always use the latest version so that you are up to date with the newest features and compatibility enhancements.

## Appendix A – Installation and Configuration

### 1. Prerequisites

To use cdmNet Desktop, you need three things.

- A broadband Internet connection.
- At least one current cdmNet user account.
- Best Practice or Medical Director 3 practice software — cdmNet Desktop has been tested on Best Practice version 1.8.0.542 and Medical Director 3 version 3.12.0.5438 (3.12).

These prerequisites are discussed below.

### 2. Internet Connection

cdmNet Desktop communicates over an Internet connection with the cdmNet web service. For this reason, an Internet connection is essential for using cdmNet Desktop.

### 3. cdmNet Accounts

To use cdmNet, and thus cdmNet Desktop, you must have at least one cdmNet account that matches your practice software user account details. You can register for an account via [cdm.net.au/register](http://cdm.net.au/register).

### 4. Practice Software Setup

To use cdmNet Desktop, you need two key pieces of information:

- **The database server instance name (Best Practice and Medical Director 3)**  
For client-server setups, you may need to refer to your IT support for the correct server name. The cdmNet Desktop installer makes a best guess at these settings, but in some cases they need to be configured manually.
  - An example server instance name might be "server\_01\BPSINSTANCE" for Best Practice or "MYHOSTSERVER\HCNSQL07" for Medical Director 3.
  - For a standalone installation it might be "localhost\BPSINSTANCE" for Best Practice or "MYLOCALSERVER\HCNSQL07" for Medical Director 3.
- **The database password (Best Practice Only)**  
To use cdmNet Desktop with Best Practice, your Best Practice database must be configured with a password. This password may already have been set during the installation of clinical audit or other IT tools. Please check with your IT support and, if this is the case, obtain the password.

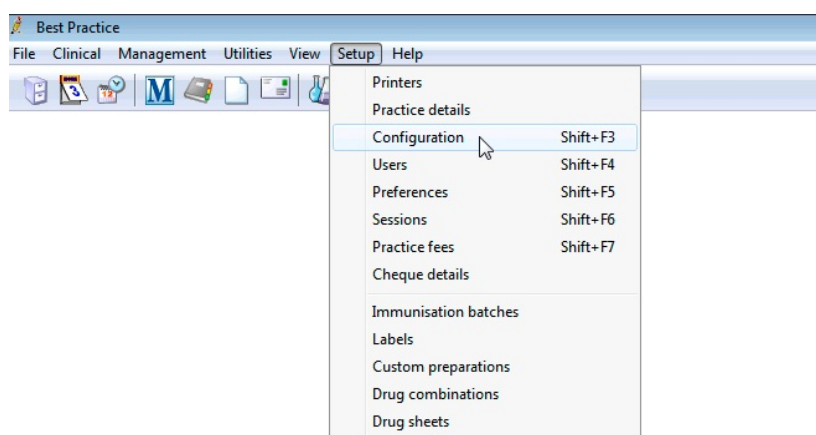
If a password has already been set for the Best Practice database, or you are using Medical Director 3, you may skip the steps below and go to section 5 "Install and Configure cdmNet Desktop". Otherwise, follow the steps below to set the database password for Best Practice.

## Step 1

Log into Best Practice as a user with permission to modify configuration settings. If your user account does not have appropriate permission you may need to talk to your IT department about access.

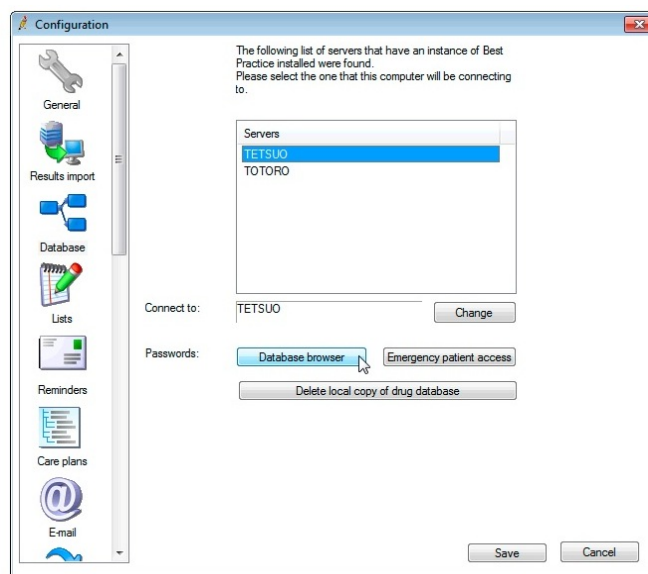
## Step 2

Go to the setup menu in Best Practice and select Configuration.



### Step 3

Choose Database from the left hand icons in the dialog and then choose the appropriate server. Now click Database browser.



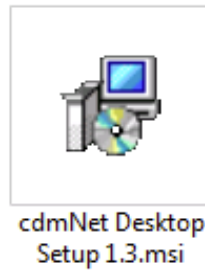
### Step 4

Choose a password now, enter it and click save. Make sure you remember this password, because you will need it later.

Best Practice is now ready for use with cdmNet Desktop.

## 5. Install and Configure cdmNet Desktop

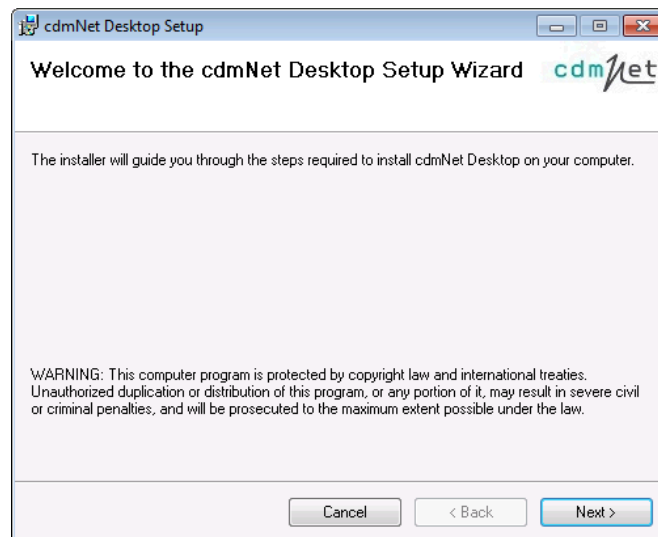
You may have received cdmNet Desktop on a disc or downloaded it from the Internet. If you downloaded it, there will be an icon on your desktop labelled **cdmNet Desktop Setup 1.3.msi** (or a similar name corresponding to the current cdmNet Desktop version).



To begin installation, double-click the installer icon.

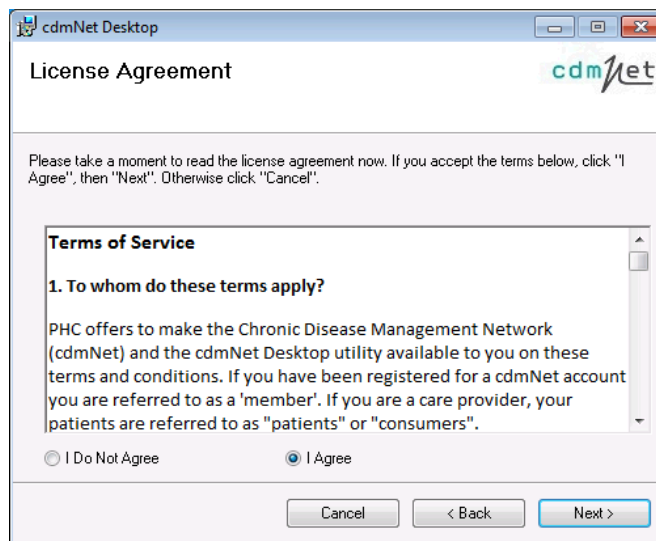
### Step 1

The Welcome screen appears (shown below). Click the **Next** button.



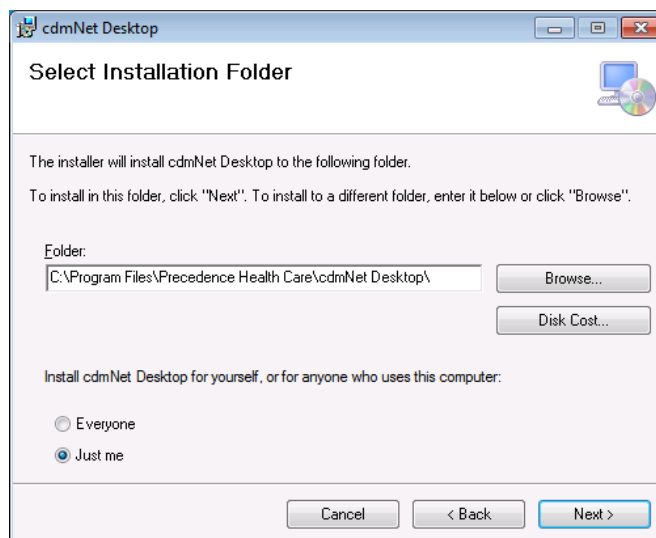
### Step 2

The installer asks you to accept the cdmNet Desktop Terms Of Service. If you agree to the terms, click **I Agree**, then click **Next** to continue.



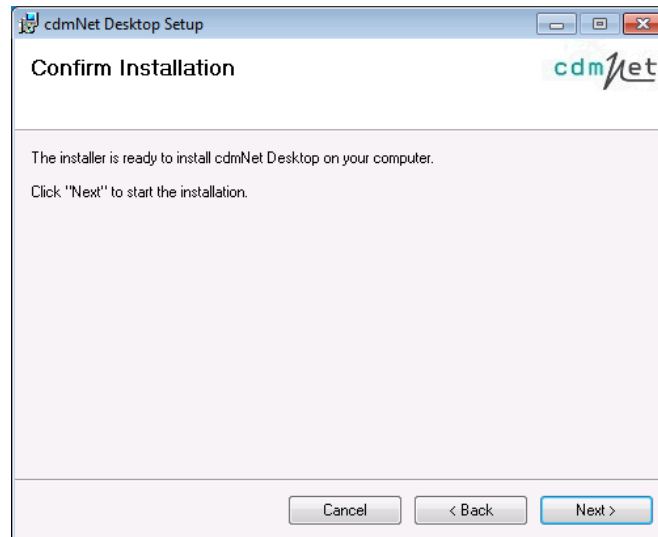
### Step 3

Choose a folder to install to or accept the default location. If you are installing cdmNet Desktop for all users of a machine (including Terminal Services and Citrix environments), choose to install for **Everyone**. Then click **Next**.



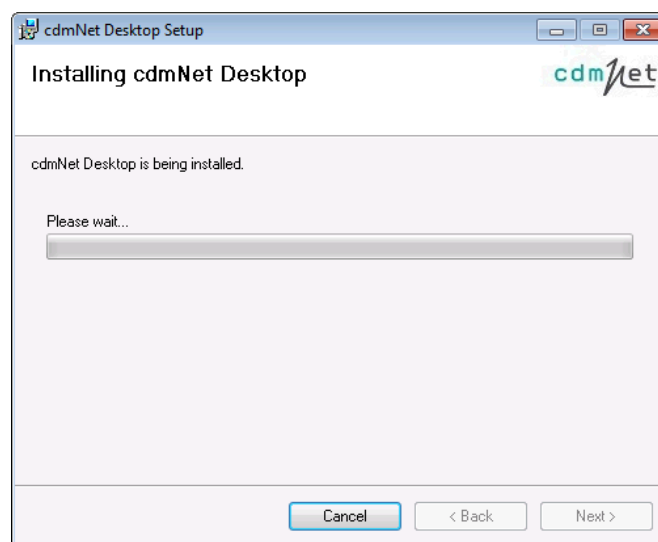
#### Step 4

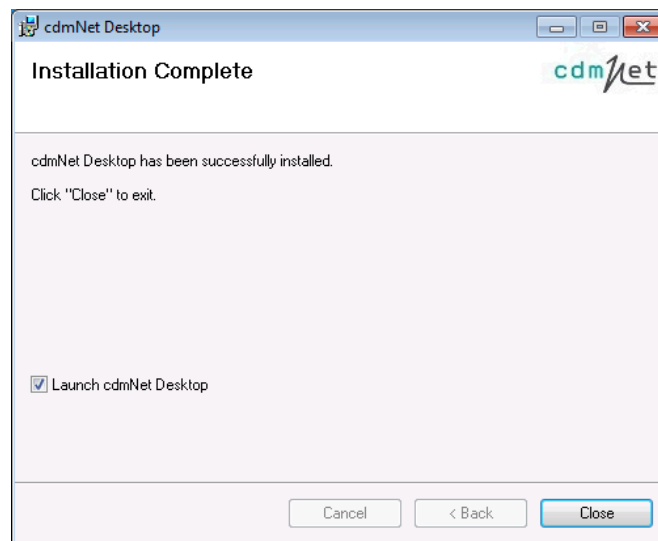
Confirm installation by clicking **Next**.



#### Step 5

Wait until the installation process finishes and click **Close**. You may optionally choose to launch cdmNet at this point.





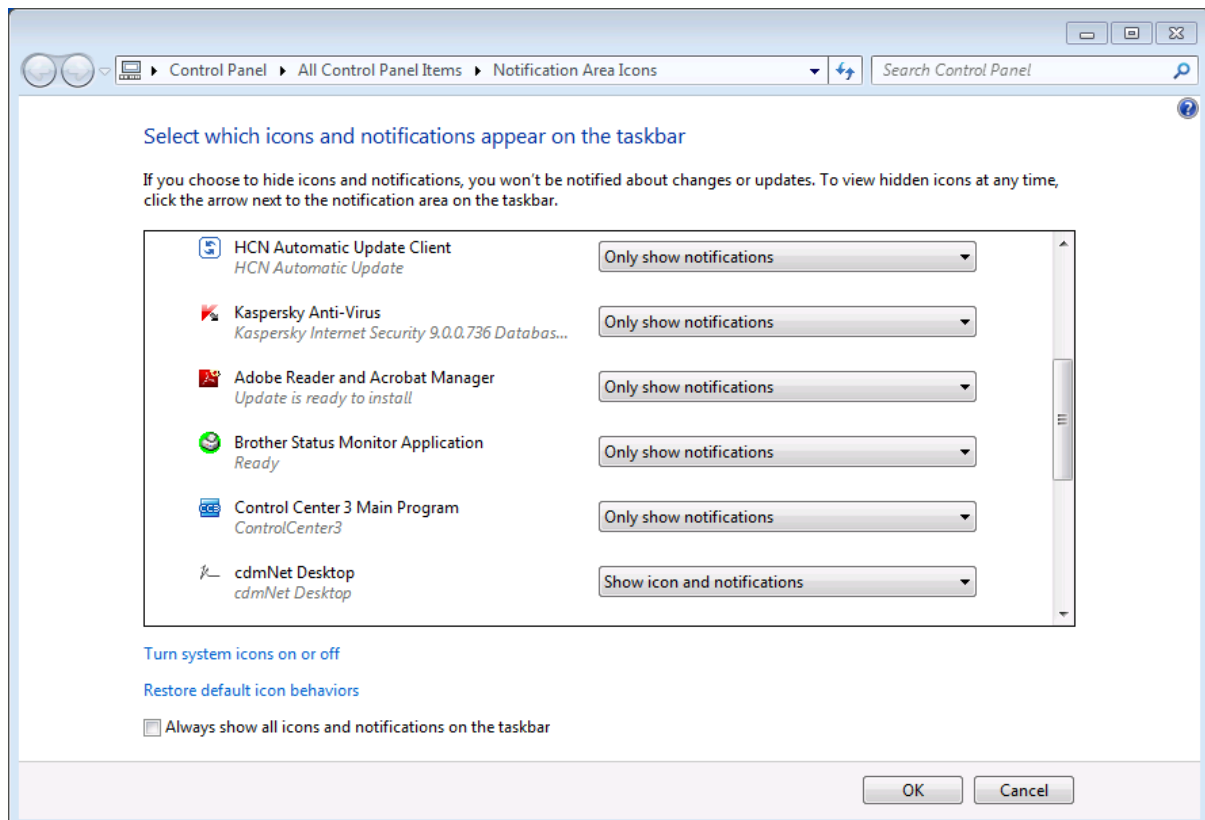
### Step 6

The cdmNet Desktop icon appears at the right of your taskbar. By default, cdmNet Desktop automatically starts when you log into your system.



[Windows 7 Only]

If the cdmNet Desktop icon does not appear at the right of your taskbar, it may be in the overflow area (the small triangle which, when clicked, pops up a window of icons not shown on the taskbar). To ensure the cdmNet Desktop icon always appears in the main taskbar area, right-click the overflow triangle and choose **Customize notification icons**.



In the window that appears, find cdmNet Desktop in the list. In the box to its right, choose **Show icon and notifications**. Click **OK** to ensure the cdmNet Desktop icon is always displayed on the taskbar.

## 6. Install and Configure for Terminal Services or Citrix

The process for installing cdmNet Desktop in a Terminal Services or Citrix environment is very similar to the process for installing on a standalone computer. However, when installing cdmNet Desktop for Terminal Services or Citrix, you have to install it for every user profile (user account) that will be using cdmNet Desktop.

For each user, follow the steps below.

### Step 1

Install cdmNet Desktop as per usual.

If the user does not have permission to install software, the system administrator will need to install it for them, or temporarily elevate their privileges in order to do so.

### Step 2

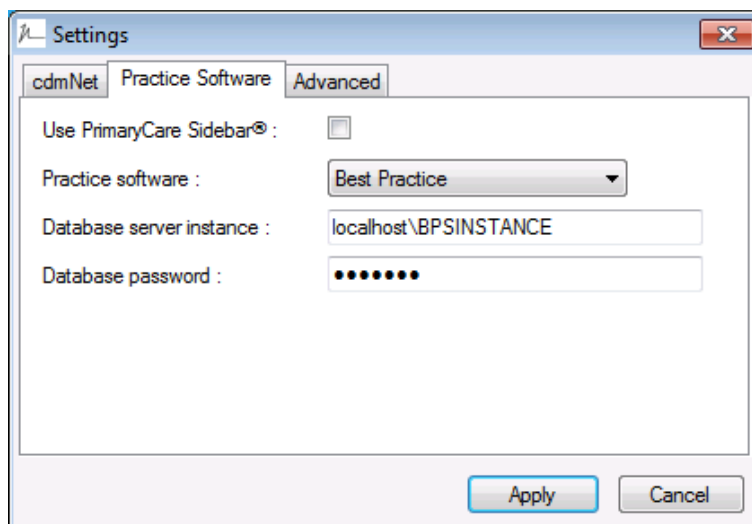
Configure which practice software this user is using and the usernames and passwords for each practice software user.

Where the user account you are installing on is only going to be used by one practice software user, you need only set up that one user. If the user account is shared, set up as many practice software users as necessary.

Please note that cdmNet Desktop does not support terminal servers using an application sharing setup for the clinical desktop software (i.e. where an application is installed once on a central server and run remotely by each user).

## 7. PrimaryCare Sidebar®

cdmNet Desktop supports care plan creation via the PrimaryCare Sidebar®. If installed, an additional option is available on the **Advanced** tab of the cdmNet Desktop settings to enable support.



For more information about the PrimaryCare Sidebar® see:

[www.racgp.org.au/ehealth/primarycaresidebar](http://www.racgp.org.au/ehealth/primarycaresidebar)

## 8. For Further Information

For further information on cdmNet Desktop or cdmNet, please visit the Precedence Health Care website at [precedencehealthcare.com](http://precedencehealthcare.com).

For all support requests, please visit [cdm.net.au/help](http://cdm.net.au/help).