Health Care Home Risk Stratification Tool

Installation Guide

Version 5.11.0 © Precedence Health Care 2018

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Requirements

It is recommended that each practice engage with their IT support staff to install the RST Tool and contact Precedence Support with any queries. Completion of each step of the installation is essential to enable functionality of the tool

Precedence Connector

The Risk Stratification Tool requires the installation and configuration of the Precedence Connector

Broadband Internet Connection

The Risk Stratification Tool requires an internet connection for the completion of each Patient Eligibility Certificate

Recommended Internet Speed

The minimum recommended internet speeds for the risk stratification tool are:

- Download speed: 3 Mbps
- Upload speed: 0.5 Mbps

Recommended Software Environment

- Windows 7 or higher
- Windows server 2008 R2 or higher Microsoft .Net Framework 3.5 must be installed prior to installing Precedence Connector for Windows Server 2008 R2.

https://www.microsoft.com/en-au/download/details.aspx?id=21

Recommended Internet Browsers

- Google Chrome version 39 (or higher)
- Firefox version 34 (or higher)
- Safari
- Microsoft Edge
- Internet Explorer 10 (or higher)

Compatible Practice Software

- Medical Director 3
- Best Practice (v.1.8.2 or higher)
- Zedmed (v.22.02 or higher)
- MedTech Evo
- MedTech 32
- Communicare (Installation guide available upon request)

Install Precedence Connector: Standalone Mode

Precedence Connector can be downloaded from the Precedence Health Care website:

- 1. Navigate to http://cdm.net.au/help
- 2. Select Downloads and then cdmNet Desktop Software
- 3. Click on Run to launch the Precedence Connector Wizard
- 4. Click on Install to start the installation (Figure 1)



Figure 1: Click Install to start the Installation

5. Tick the box to accept the Terms of Use and click Next

6. Select the option Install just for you if you do not have Administrator privileges or Install for all users of this machine if you have Administrator privileges (Figure 2).



Figure 2 cdmNet Desktop Setup

- 7. Accept the default folder location or change to another folder location
- 8. Click on Install and then click on Finish to complete the installation process

Install Precedence Connector: Terminal Server or Citrix

The process for installing in a Terminal Server or Citrix environment is similar to the Standalone Mode

- 1. Follow the steps **Install Precedence Connector: Standalone Mode** to install cdmNet Desktop for all users on the Terminal Server or Citrix
- 2. Configure the Precedence Connector settings for each Terminal Server account (see Configure Precedence Connector Settings pages 14)

Install Precedence Connector: Server / Client Mode

The Precedence Connector can be installed on the server. Clients can then connect to, and store, the server settings. Please ensure you have the IP address of the designated server machine

Server Mode Configuration

- 1. Follow the steps **Install Precedence Connector: Standalone Mode** to install the Precedence Connector on the designated server machine
- 2. Click on the Precedence Connector application from the tray area and select **Settings** (Figure 3)

Extensions	
Get started with cdmNet	
Check for update	
Settings	
Help	
About	
Exit	

Figure 3: Settings

3. Click on Advanced and then Change Operation Mode (Figure 4)



Figure 4: Change Operation Mode

4. Change to Server Mode and click on Close (Figure 5)



Figure 5: Change to Server Mode

Client Mode Configuration

- Repeat the steps to Install Precedence Connector: Standalone Mode on any client machines
- 2. Click on the Precedence Connector application from the tray area and select **Settings** (Figure 3)
- 3. Click on Advanced and then Change Operation Mode (Figure 4)
- 4. Change to **Client Mode** and enter the server IP address
- 5. Click on Test and if correct click on Close (Figure 6)

h	Operation mode	>
O Server mode		
cdmNet Desktop v machine.	vill operate in server mode, and clients can connect and st	ore settings on this
Client mode		
cdmNet Desktop v settings with the se	vill operate in client mode and if correctly connected to a se erver.	erver, it can share the
cdmNet Desktop v settings with the se Server address :	vill operate in client mode and if correctly connected to a server. 10.0.1.62	erver, it can share the Test
cdmNet Desktop v settings with the se Server address : O Standalone mo cdmNet Desktop v	vill operate in client mode and if correctly connected to a server. 10.0.1.62 de vill operate in standalone mode, and store settings locally.	erver, it can share the

Figure 6: Change to Client mode and Enter the Server IP Address

Clinical Software Configuration

To allow the Precedence Connector to integrate with your clinical software, the following information must be configured in your Precedence Connector

Database server instance (Medical Director, Zedmed, Best Practice)

The Precedence Connector will make a best guess at the server name to connect to your clinical software. However, in some cases this will need to be configured manually. The database server instance should be the same as where the practice software has been installed

Medical Director Configuration

- 1. Click on the Precedence Connector application from the tray area and select Settings
- 2. Click on Clinical Software (Figure 7)
- 3. Select Medical Director from the drop down list
- 4. Check the Database server instance is correct
- 5. Click on Test



Figure 7: Medical Director 3 Configuration

Zedmed Configuration

- 1. Click on the Precedence Connector application from the tray area and select **Settings**
- 2. Click on **Clinical Software** (Figure 8)
- **3.** Select **Zedmed** from the drop down list
- 4. Check the Database server instance is correct
- 5. Click on Test

	·	Settings			
cdmNet Clinical Software	Billing Software	Download Options	Connectivity	Advance	d
Practice software :		Zedmed		~	
Database server instance :		WIN-SD40DNO6JG	90		Defaul
Database folder :		c:\zedmed			
			c	2	Test
				2	Test

Figure 8: Zedmed Configuration

Best Practice Configuration

- 1. Click on the Precedence Connector application from the tray area and select Settings
- 2. Click on Clinical Software
- 3. Select Best Practice from the drop down list
- 4. Check the Database server instance is correct

Role based access roles

If Best Practice is version 1.8.2 or above you can enable access to the Best Practice database **without** a password.

To enable this:

- 1. Navigate to the Setup menu of Best Practice and select Configuration
- 2. Select Database from the left hand side
- 3. Next to External data access roles tick Clinical, Billing and Appointments and then Save (Figure 9)

File Clinica	Management Utilities	View Setup	Help							
I	Printers		🖢 🤳	🕜 🖡	R		Configura	ition		×
	Practice details				ß	•	The following list of server	rs that have an instance of	of Best	
	Configuration	Shift+F3					Practice installed were for Please select the one that	und. It this computer will be con	nnecting	
	Users	Shift+F4			25		to.	at this compater will be con	Thoung	
	Preferences	Shift+F5			General					
	Sessions	Shift+F6					Servers			
	Practice fees	Shift+F7					TOTORO			
	Cheque details				Results import		WIN-SD40DNO6JQO			
	Immunisation batches						(local)			
	Labels									
	Custom preparations				Database					
	Drug combinations									
	Drug sheets			AL I						
				13		Connect to:	(local)	Cha	ange	
					LISIS		1		-	
				CIN C		Passwords:	Database browser	Emergency patient	t access	
				1000	Beminders		Delete local	conv of days database		
							Delete local	copy of drug database		
					E	External data a	ccess: Clinical	✓ Billing	 Appointments 	
					Care plans					
					\bigcirc					
					E-mail			_		_
						~			Save Cancel	

Figure 9: Enable External Data Access Roles

- 4. Click on the Precedence Connector application from the tray area and select **Settings**
- 5. Click on Clinical Software
- 6. Select Use external data access roles and click on Test (Figure 10)

_			settings			_
cdmNet	Clinical Software	Billing Software	Download Options	Connectivity	Advanc	ed
Practice	software :		Best Practice		~	
Databas	e server instance :		(local)\BPSINSTAN	CE		Default
Shared	document download	folder :				
	external data acces	and and and Data Data	tine 102 history			
 Use 	external data acces	ss roles(best Frac	tice 1.8.2 or higher)			
O Use	database browser p	oassword	tice 1.8.2 or higher)			
 Use Use Databas 	database browser p	oassword	ace 1.6.2 or higher)			
 Use Databas 	database browser p	assword	ace 1.8.2 or higher)			
 Use Databas 	database browser p	password	ace 1.8.2 or higher)		2	Test

Figure 10: Use External Data Access Roles

Browser Password

If a password has been set for the Best Practice database:

- 1. Click on the Precedence Connector application from the tray area and select **Settings**
- 2. Click on Clinical Software (Figure 11)
- **3.** Select **Best Practice** from the drop down list
- 4. Select Use database browser password
- 5. Enter the password and click on Test

£		Settings			
cdmNet Clinical Software	Billing Software	Download Options	Connectivity	Advance	ł
Practice software :		Best Practice		*	
Database server instance :		(local)\BPSINSTAN	ICE	[Default
Shared document downloa	d folder :				
O Use external data acce	ess roles(Best Prac	tice 1.8.2 or higher)			
Use database browser	password				
Database password :		•••••			
				Т	est
			Apply	(Cancel

Figure 11: Use Database Browser Password

Configure User Settings

Once the Precedence Connector has been installed and the clinical software settings have been configured, please login to your clinical software.

1. Click on the Precedence Connector from the tray area and select **Settings** (Figure 12)

Extensions	
Get started with cdmNet	
Check for update	
Settings	
Help	
About	
Exit	

Figure 12: Precedence Connector Settings

- 2. Navigate to the cdmNet tab
- **3.** Select the relevant user in the list clinical software user accounts (Figure 13)
- 4. Click Edit

5. Enter the username a password provided in the Health Care Homes registration form

6. Save and Apply

7. Repeat steps 3-6 until all user credentials have been saved in the connector

	K		9	Settings			×
	cdmNet	Clinical Software	Billing Software	Download Options	Connectivity	Advanced	
	Users						2
	* indicat	es a cdmNet accou	unt has not been li	nked to this user.			
	Select a	user and click Edit	to enter cdmNet	og in details.			
	* Dr Bn * Dr Jar * Dr Ro * Mr He	u <mark>ce Bond (2121701</mark> nes Jekyll (205478 bina Doolan (21213 enry Hyde (2121711	H) 1W) 331W) IF)			Ed	lit
∬⊂ Edit	cdmNe	t Desktop Use	er Details	×			
User :	Dr	Bruce Bond (212	21701H)			Re-s	can
cdmNet usema	me: bbo	nd					
cdmNet passwo	ord :						
		Save	e Cance		Apply		ncel

Figure 13: Save user credentials

Turn off care plan recommendations

This settings will need to be configured on the sever, if running Client/Server mode. Alternatively, please configure per machine.

- 1. Click on the Precedence Connector from the tray area and select **Settings** (Figure 12)
- 2. Navigate to the Advanced tab (Figure 14)
- 3. Untick 'Show care plan recommendations and Apply

N Settings
cdmNet Clinical Software Billing Software Download Options Connectivity Advanced
Auto-start at Windows log in :
Show care plan recommendations :
Service endpoint : cdmNet v
Disable settings sync :
Patient updates : Update when patient record is opened V
Operation mode : Change operation mode
Automatically update software when available :
Test
Apply Cancel

Figure 14: Untick 'show care plan recommendations'

Configure the Risk Stratification Tool

The Risk Stratification Tool must be configured through the Precedence Connector Extensions

1. Click on the small Precedence Connector icon in the task bar and select Extensions



Figure 15: Extensions can be found through the Precedence Connector menu

2. Select **Configure...** next to Health Care Home Risk Stratification (Australian Government)

/ Extensions	—	×
Data Quality Report		^
Identify the potential data errors in patient records.	Start	
Health Care Home Risk Stratification (Australian Government) Determines probability of patient hospitalisation for Australian Government Health Care Homes.	Configure)
Potential HCH Patients Patients with Certificates		
MediTracker		
Last completed Apr 10, 2018 11:50 AM <u>(View Results)</u> Manage the upload of health data for patients who have registered for MediTracker and nominated this practice as their usual GP practice.	Configure	
	Clo	se

Figure 16: Overview of Extensions

3. Enter your user credentials, provided in the Health Care Homes registration form and **Save**. These credentials must first be configured in the users settings, outlined on page 15 (Figure 13). The credentials entered must belong to a user with access to **ALL** practice software records.

2	Extensions -	
MediTr Manage nominat	Acker the upload of beatth data for patients who have registered for MediTracker and Health Care Home Risk Stratification ×	re
Health Potentia Manage Stratifica	User Credentials Enter the credentials of a cdmNet user who will be responsible for uploading health data for patients using Risk stratification. Usemame :	re
	Cancel Save	
		Close

Figure 17: Enter user credentials

Configure Import Path

The Import Path will allow the Health Care Home Risk Stratification Certificate to be imported back into the practice software.

Medical Director

The Medical Director Import path must be set up **per MD login** and each user must have **their own** cdmnetdocuments[*MDuser*] folder

1. Create a folder for each user on the shared network titled **cdmnetdocuments**[*MDUser*] For example:

//terminalserver/cdmnetdocumentsuser1
//terminalserver/cdmnetdocumentsuser2

2. Login to Medical Director as User 1 and navigate to Manage Communications via the Tools menu

en	File	Patient	User	Tools	Clinical	Correspondence	Search	Resources	Sidebar	Help
L	etter W abels	/riter				F8				
х	(-ray Vi	ew Screen	n			Ctrl+Shift+X	:			
C	alculat	tors					•			
Ν	/ledica	re Australi	a PKI C	ertificat	e Manage	r				
C	ptions									
Ρ	rint Op	otions								
N	/lanage	Commu	nicatio	ns						
N	//DExch	ange					•			
Ρ	atient	Photo Op	tions							
H	lealthL	ink					+			

Figure 18: Medical Director: Tool menu

3. In the General tab, set the Import Database to Live Data. Next set the Automatic Import Interval to 2 minutes

t)		Ma	nage Communio	cations		×
General	Setup Data Transfer	Advanced Pathology	Message Tracking			
Import	t Configuration				Recognised File	Extensions
Auto	Import Database	MD Live Data 2 minutes	•	v	CPL CQP GRI HL7 HMP HSM MPS ORU PIT QML RRI RUS SDS SNP SDS SNP SPX TRN	~
						<u>+ ×</u>
						Close

Figure 19: Medical Director: Manage Communications 18 of 25

4. In the Setup Data Transfer tab, click Add to open the Setup Data Transfer Details pop-up

		Manage Com	nmunications					
General Setup Data T Filter by Category All	ransfer Advanced	d Pathology Message Tr	acking					
Description	Category /	Import Folder	Export Folder	SDI	Manual	ACK	Global	
MD Directory	Standard	C:\Program Files (x8	C:\Program Files (x8					
MD Messages	Standard	C:\Program Files (x8	C:\Program Files (x8		•			
MDX	Standard	C:\ProgramData\MD	C:\ProgramData\MD	~		~		
HealthLink Interface f	File Path			Refr	esh Health	Link Imp	oort Path(s))

Figure 20: Setup data transfer

5. In both **Description** and **Categories**, please type the relevant file name e.g. cdmnetdocumentsuser1

	Manage Communications	×
General Setup Filter by Catego Description	Data Transfer Advanced Pathology Message Tracking ory All Setup Data Transfer Details Global	
MD Directory MD Messages MDX	Description cdmnetdocumentsuser1 Category cdmnetdocumentsuser1 Import Folder Export Folder Automatic Import Enabled (SDI) Manual Import Enabled (Manual) Generate Acknowledgement (ACK) Available Network Wide (Global) OK Cancel	
HealthLink Inte	erface File Path Refresh HealthLink Import Path(s)	
Add	Edit Delete Close	

Figure 21: Edit search path details

6. Click the '...' next to both Import Folder and Export Folder to search and add your folder; cdmnetdocumentsuser1 and select OK

Browse For Folder	>
Please select the import folder.	
Eibraries	^
🖉 🖣 Network	
▷ 🖳 DARYL-WIN10	
▷ 🖳 DESKTOPDEVWIN7	
🖻 🖳 KATIE	
⊿ 🖳 TOTORO	
🛛 🖳 cdmNet-BP-Documents	
▶ 🖳 d	
4 🚆 honmsgs	
D 🌗 3rdParty	
🍌 cdmnetdocumentsuser1	
Commetdocumentsuser2	~
Make New Folder OK Ca	incel

Figure 22: Search for folder

7. Ensure the Automated Import Enabled (SDI) and Manual Import Enabled (Manual) tick boxes are both ticked

•		Manage Communications			
General Setup Data Tran	sfer Advanced	Pathology Message Tracking			
Filter by Category All	Filter by Category All				
Description	Category /	Import Folder	Export Folder	SDI	Manual
cdmnetdocumentsuser 1	cdmnetdocu	\\Totoro\hcnmsgs\cdmnetdocumentsuser1\	\\Totoro\hcnmsgs\cd		
MD Directory	Standard	C:\Program Files (x86)\Health Communicatio	C:\Program Files (x8		
MD Messages	Standard	C:\Program Files (x86)\Health Communicatio	C:\Program Files (x8		
MDX	Stan	Manage Communications	× pata\MD		
		Would you like to save your changes?			
	[Yes No Ca	incel		
<					>
HealthLink Interface File	Path		Refresh HealthLink I	(mport P	ath(s)
Add Edit	Delete				Close

Figure 23: Save changes and Close

8. Select Close, then Yes in order to save your changes

9. Repeat for each MD login

Note: When you log in to User 2 and so on, you will be able to see the download path that has already been added for User 1 however this path will NOT be recognised for User 2 by MD

10. Once the certificate has been downloaded via the Precedence Connector, it can be found in the relevant practitioner's inbox in Medical Director, where it will need to be added to the patient record

Best Practice

The import path for Best Practice can be configured in two different ways depending on your set up; standalone machine or server environment

Standalone Machine

- 1. Create a folder on your desktop titled cdmnetdocuments
- 2. Login to Best Practice and navigate to Configuration through the Setup menu



Figure 24: Best Practice set up menu

3. Click Add and search your computer for the file created in step 1; cdmnetdocuments

R	Configuration	×
General	Import investigation reports on this computer Don't allow unallocated reports into Inbox Add header to incoming letters Report file search paths:	
Results import	Browse for Folder Add Remove	
Database Database Lists Reminders Care plans Care plans	Image: Control Panel Admin Image: Control Panel Add Image: Control	
	✓ Save Cancel	

Figure 25: 'Add' cdmnet documents folder to Report file search paths

4. Save

- 5. Once the certificate has been downloaded via the Precedence Connector, it can be found in **Unchecked Reports** when the patient's file is open in Best Practice
- 6. Repeat steps 1-4 for each user profile/Windows login

Server Environment

- **1.** Create a shared folder on the server titled **cdmnetdocuments**. All users must have rights to read and write to this folder.
- Login to Best Practice and navigate to Configuration through the Setup menu (Figure 24: Best Practice Setup Menu)

3. Click **Add** and search your computer for the file created in step 1; **cdmnetdocuments** (Figure 25: Browse for cdmNetdocuments folder). Please ensure you are using a network path (rather than a local path)

A Configuration	×
General	Import investigation reports on this computer Don't allow unallocated reports into Inbox Add header to incoming letters Report file search paths: Path Computer Add VJI/WIN/cdm/Net Documents JI/WIN
Hesults import	Check paths Check
Care plans	Number of months to display in Investigation reports list: 1 Number of months to display in Follow up inbox list: 12 Enable polling for insurance reports (UHG) UHG log in password: UHG log in password:
General	 ✓ Import investigation reports on this computer ✓ Don't allow unallocated reports into Inbox ✓ Add header to incoming letters Report file search paths:
Results import	Path Computer Add C:\Users\Admin\Desktop\cdmNetdocuments JI-WIN X Check paths
Database	Keep HL7 and PIT files after import

Figure 26: Add shared network path

4. Save

5. Open the Precedence Connector Settings and go to the Clinical Software tab

6. Tick Shared document download folder and Apply

1	Settings	×
cdmNet Clinical Software Billing Software	e Download Options Connectivity Advanced	
Practice software :	Best Practice V	
Database server instance :	(local)\BPSINSTANCE	Default
Shared document download folder :		
Use external data access roles(Best Praces)	actice 1.8.2 or higher)	
O Use database browser password		
Database password :		
		Test
	Apply	Cancel

Figure 27: Precedence Connector: Clinical Software Settings

Zedmed

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

Once the certificate has been downloaded via the Precedence Connector, it can be found through the patient's Zedmed record under Results - Import Laboratory Results

Testing

Once installation and set up is complete, please email Precedence Support (details below) to organise a remote access session to test the Risk Stratification Tool is working correctly. You will need to register one of the below listed test patients in your clinical software for the purpose of the test.

Name: John Test DoB: 1st October 1955 Gender: Male Medicare number: 3068 28021 1 /1

Name: Susie Test DoB: 1st September 1960 Gender: Female Medicare number: 4862 16089 1 / 1

Precedence Support

For further assistance or technical support please contact the Precedence Help Desk.

Phone: 1300 236 638 between 8.30am and 8.00pm (AEST Monday to Friday)

Email: support@precedencehealthcare.com