Updated: March 2025*

As part of the Evidence2Practice Ontario (E2P) program, the eHealth Centre of Excellence is providing change management at no cost to support clinicians with the implementation and optimal use of E2P tools.

If you have any questions, please reach out to EMRtools@ehealthce.ca and we will be happy to help!
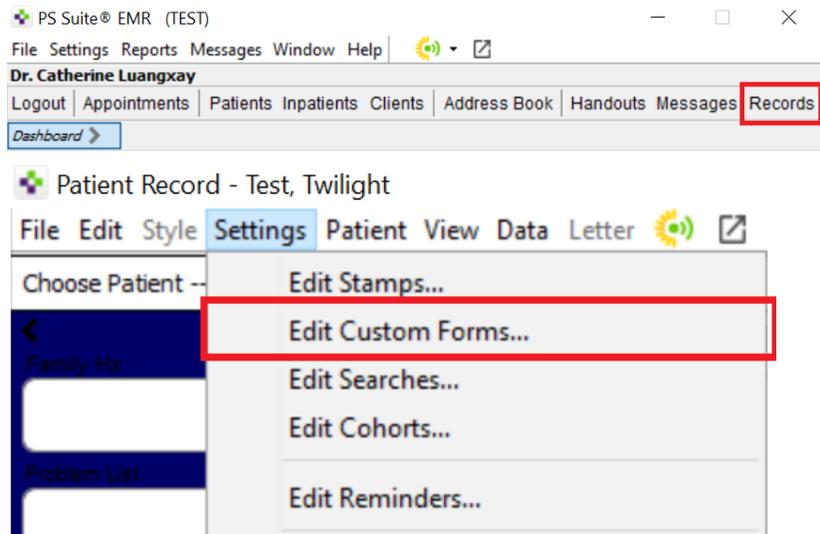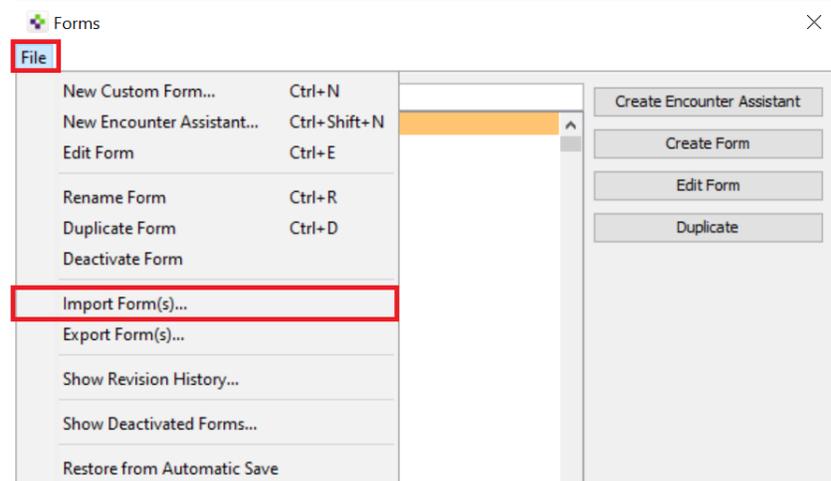
Installation Guide: Table of Contents

Evidence2Practice Ontario (E2P) Tool Installation Guide

A. Import the Custom Forms

1. In PS Suite EMR, from the **Records** window, choose **Settings** > **Edit Custom Forms**.

2. In the **Forms** window, from the **File** menu, choose **Import Form(s)**.

3. Navigate to your **computer's desktop** and double-click the folder that contains the custom form files.

4. Click the **custom form(s)** in the list that you want to import.

5. Click the **Choose** button. If you are importing multiple forms at once, and depending on the speed of your computer, the import may take 30 seconds or more.
   A message will prompt you when the import is successful.

Optional Toolbar Customization

By default, the tools open as 'pop-up' windows. Selecting and saving this checkbox will default the launching of tools directly into the progress notes section.
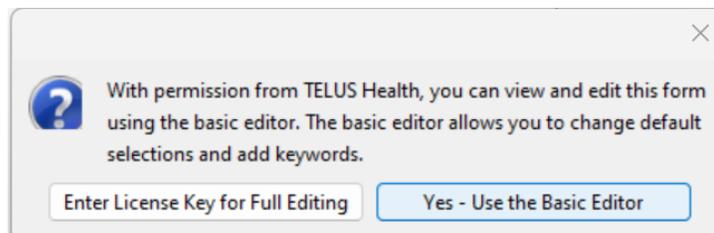
1. Navigate to **Settings** and select **Edit Custom Forms**

2. In the search bar, type in "**E2P**".

Search for the form titled: **"E2P – Toolbar"** Click **"Edit Form".**
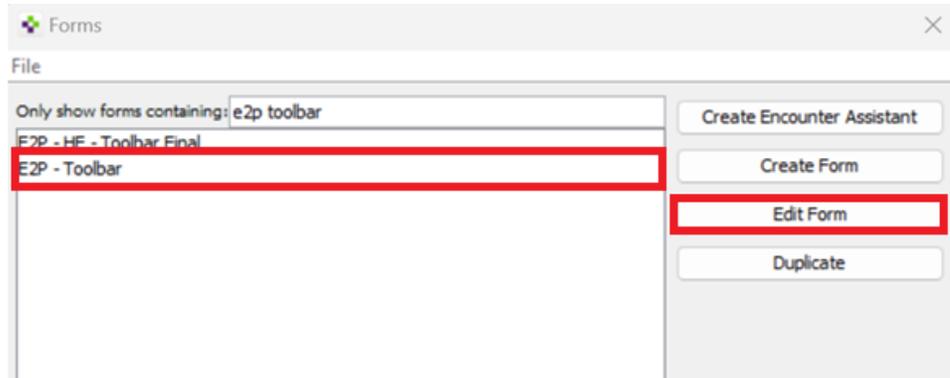
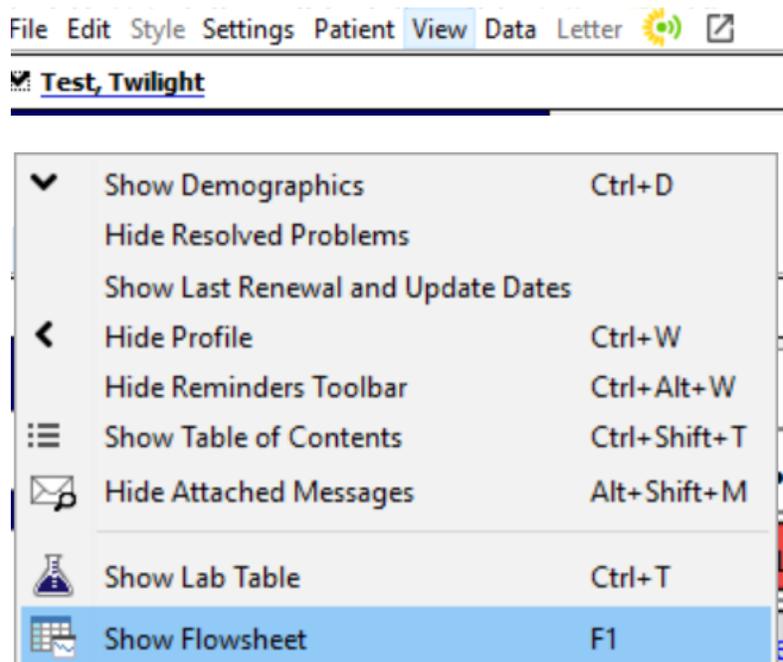In the pop-up window, choose Basic Editor.

Select the box "Enable toolbar buttons to insert tools directly into patient chart"
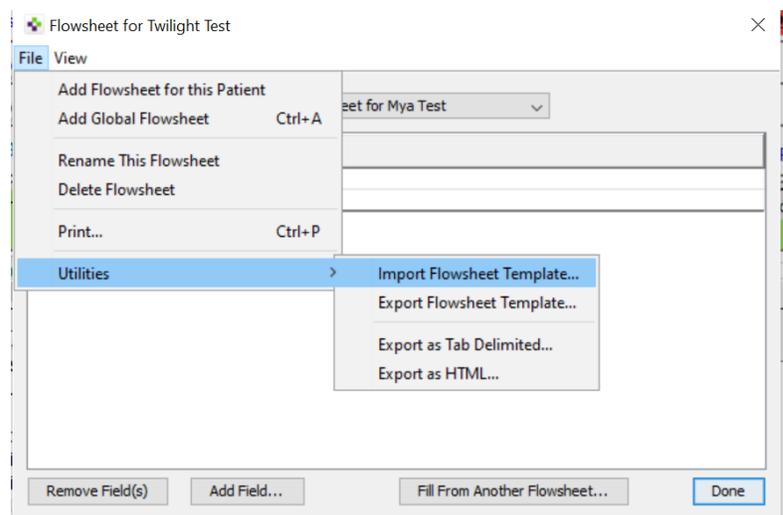
Click "Checked" in the box on the right.

Evidence2Practice
Ontario
Accessible. Actionable. Adaptable.

B. Import Flowsheet

6. In PS Suite EMR, from the **Records** window, choose **View** > **Show Flowsheet**.

File Edit Style Settings Patient View Data Letter

Test, Twilight

∨	Show Demographics	Ctrl+D
	Hide Resolved Problems	
	Show Last Renewal and Update Dates	
‹	Hide Profile	Ctrl+W
	Hide Reminders Toolbar	Ctrl+Alt+W
☰	Show Table of Contents	Ctrl+Shift+T
✉	Hide Attached Messages	Alt+Shift+M
⚗	Show Lab Table	Ctrl+T
▦	Show Flowsheet	F1

7. Click **File** > click **Utilities** > then choose **Import Flowsheet Template**.

Flowsheet for Twilight Test

File View

Add Flowsheet for this Patient
Add Global Flowsheet   Ctrl+A   eet for Mya Test

Rename This Flowsheet
Delete Flowsheet

Print...   Ctrl+P

Utilities   >   Import Flowsheet Template...
                                        Export Flowsheet Template...

                                        Export as Tab Delimited...
                                        Export as HTML...

Remove Field(s)   Add Field...   Fill From Another Flowsheet...   Done

8. Navigate to your **computer's desktop** and double-click the folder that contains the flowsheet files.

9. Click the **flowsheet(s)** in the list that you want to import. The flowsheets will be "**.flowsheet**" files.

10. Click the **Choose** button. The import may take 30 seconds or more. A message will prompt you when the import is successful.
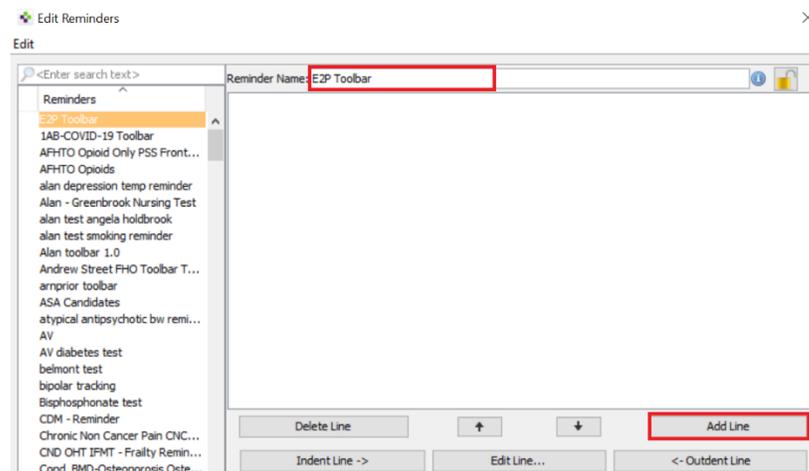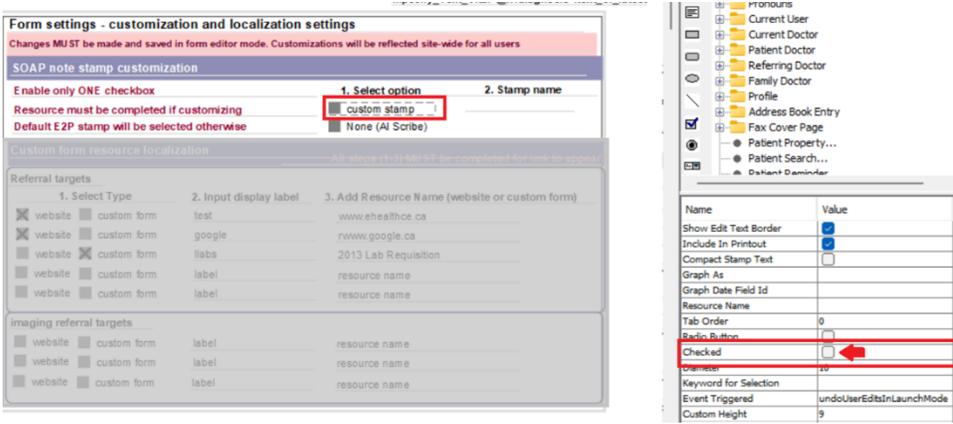
C. Set Up Reminders

11. In PS Suite EMR, from the **Records** window, choose **Settings** > **Edit Reminders**.
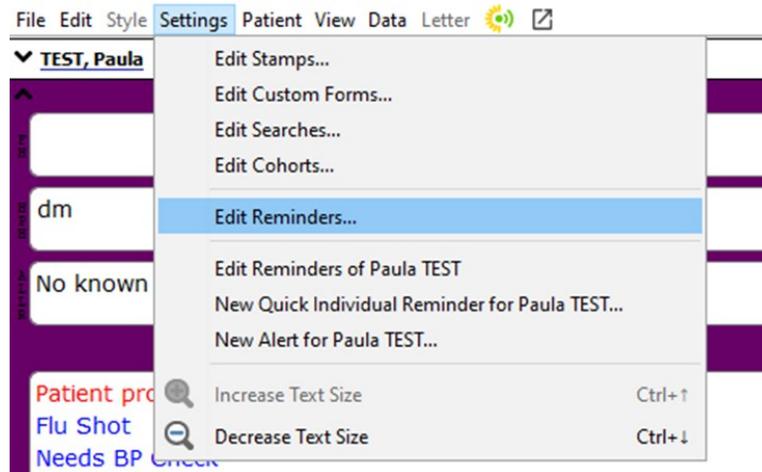
12. Click **New Reminder** at the bottom.
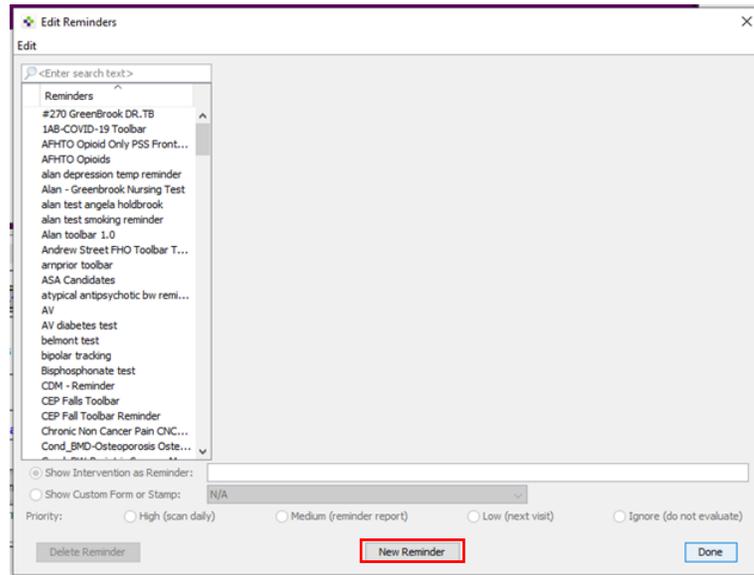
13. Enter "**E2P Toolbar**" as the name for the reminder. Then click **Add Line**.

14. Click **Other › Current User Initials › contains ›** enter PSS initials.

15. Click **Show Custom Form or Stamps** and select **"E2P – Toolbar"**. Then click **Done** to save your work.

D. New Tool Version Process

After you have downloaded the updated tool package, follow these steps to import the tool into the EMR.

Heart Failure Management Tool - Version 3.0 Update

Before using the updated Heart Failure Management Tool, you must complete the form customizations and localization settings for certain features to work.

1. Navigate to **Settings** and select **Edit Custom Forms**	
2. In the search bar, type in "**E2P HF**". Search for the form titled: **"E2P – HF – Visit Form PSS"** Click **"Edit Form".** In the pop-up window, choose Basic Editor.	
3. Drag the button scroll bar to the center to reveal the "form settings – customization and localization setting" window. Please ensure to pull the bottom right up to reveal the editor settings.	
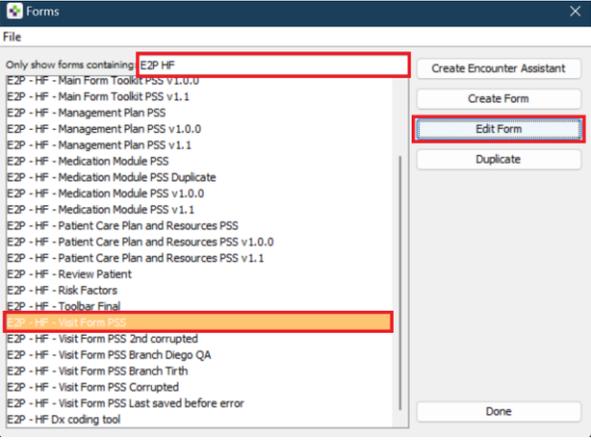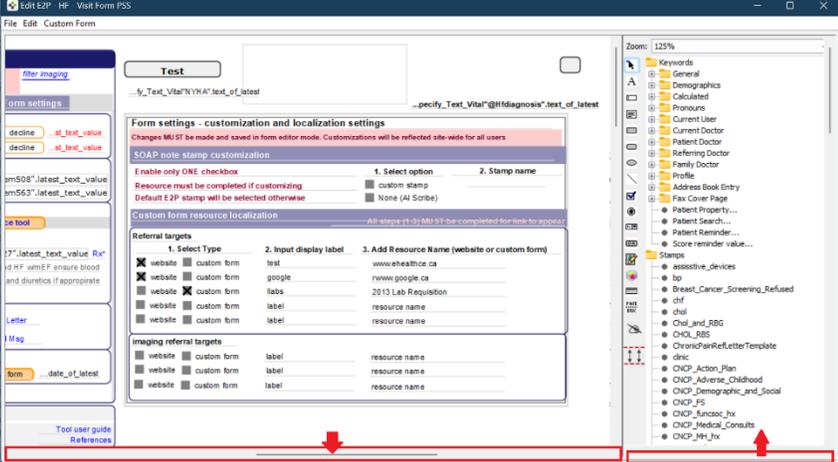
To customize the SOAP note stamp to a different stamp follow these instructions. If you would like to use the default stamp developed by E2P, please skip this step.	
1. Click on the **custom stamp** box. In the window on the right, scroll down to the line for "Checked". Then click on the box next to it to check it off.	
2. Stamp name • Click on the corresponding **blank** box. On the **top right half** of the window: • Scroll down to the **Stamps list** and search for the stamp you would like to embed. Then on the **bottom right** half of the window: • Scroll down to the line for "**Text**". • Then enter the **name** of the stamp you wish to add.	
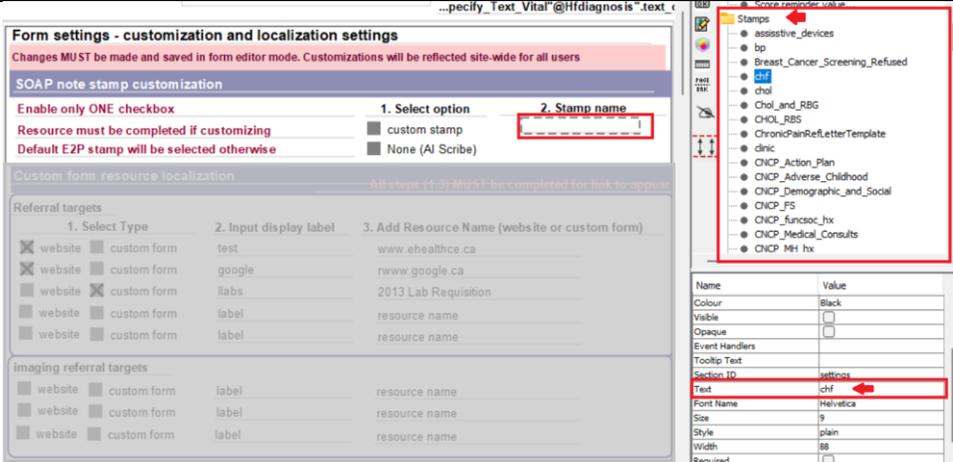
If you are using AI Scribe, you may wish to disable the stamp functionality.	
Click on the box for **None (AI Scribe)** In the window on the right, scroll down to the line for "Checked". Then click on the box next to it to check it off.	

To customize the form resources, follow these instructions.

To set a **website referral** or **Imaging referral** targets, follow these steps:

1. Select Type: Click on the box for **website.** • In the window on the right, scroll down to the line for "**Checked**". • Then **click on the box** next to it to check it off.	
2. Input display label • Click on the **label** box. In the window on the right, scroll down to the line for "**Text**". • Then enter a **name** for the referral you wish to add.	

3. Add Resource Name (website or custom form) • Click on the **resource name** box. In the window on the right, scroll down to the line for "**Text**". • Then enter the **link** for the referral you wish to add.	

To set a **custom form referral** target follow these steps:

1. Select Type: Click on the box for **custom form.** • In the window on the right, scroll down to the line for "**Checked**". • Then **click on the box** next to it to check it off.	
2. Input display label • Click on the **label** box. In the window on the right, scroll down to the line for "**Text**". • Then enter a **name** for the referral you wish to add.	

3. Find the form name: Go to the forms search bar, **select the custom form**, **right-click**, and choose "**Rename Form**." **Copy (Ctrl +C)** the form name. Then click **cancel** to close the window. Navigate back to the HF Tool form settings window.	
3. Add Resource Name Click on the **resource name** box. In the window on the right, scroll down to the line for "**Text**". **Paste (CTRL +V)** the **name** of the referral you wish to add.	
Navigate to the top left corner to save your work! Or use your keyboard **CTRL +S** to Save.	
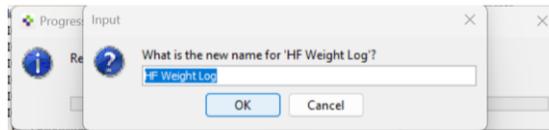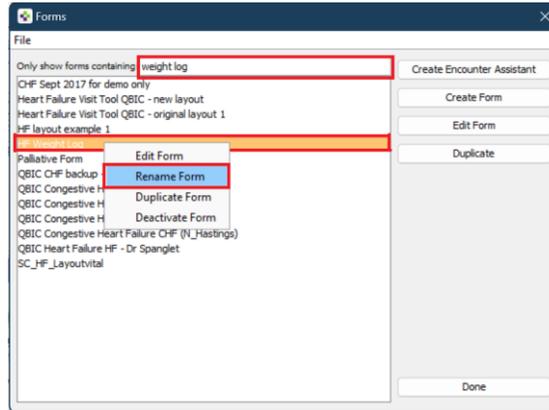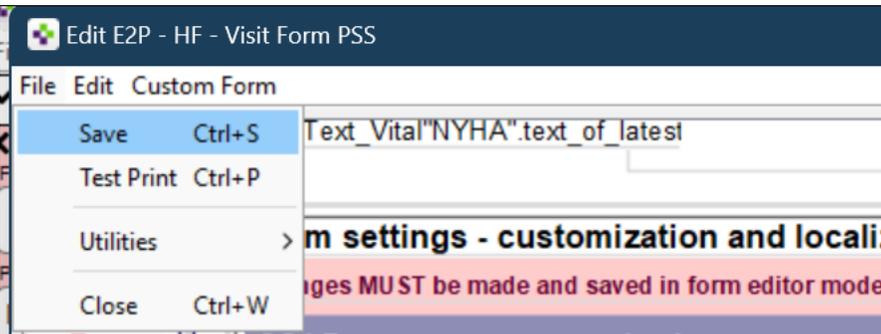
A. Tool Feedback

We would love to hear your feedback! Users are welcome to share their thoughts and opinions regarding the tool. We've also included the ability to share your feedback anonymously or you can also include your email address if you would like to be contacted in the future.

*Links can be found at the footer of the screening & visit tools next to the usage analytics link

B. Overview of Usage Analytics

Evidence2Practice Ontario (E2P) is a collaborative initiative led by the eHealth Centre of Excellence (eCE), the Centre for Effective Practice, and North York General Hospital, with funding and strategic direction from Ontario Health to support Ontario's Digital First for Health Strategy. E2P gathers real-time data on the usage of its tools in electronic medical records (EMRs), as well as feedback from users, to assess the impact and improve both the tools and user experience. The data collected is limited to general information such as tool usage, clinician categories, and site details, while patient and clinician identifiers are hashed for privacy. Participation in data submission is voluntary, and individuals can opt out at any time. The collected data may be shared with relevant organizations for program evaluation and funding purposes, with all personal identifiers kept anonymous. The eCE adheres to industry standards for data protection through hashing and ensures the secure handling of sensitive information.

 For more information, please contact EMRTools@ehealthce.ca for more information. or see our privacy statement. If you would like to learn more about our EMR usage analytics program and the benefits of participating, please visit our website.

C. Known Issues/Errors

1. Rendering custom form issues:

Problem: All sites will experience the form overlapping issue on the first opening of the tools after installation/update.

Solution: Unfortunately, this is a known PS Suite error. Open each E2P form and if this issue is seen, close the window and re-open. Please note that this will only happen once, you will not encounter this for each patient.
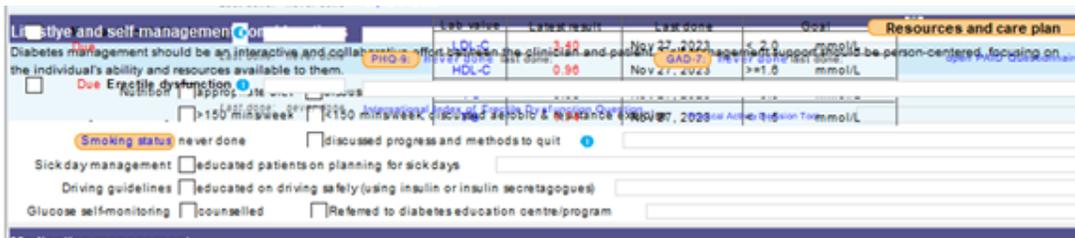
2. Tool Installation Troubleshooting:

Problem: Some users have experienced an error message during installation resulting in a cancelled installation with no forms being imported. This is most often seen when importing the "E2P – MH – Anxiety Disorders and Depression Visit Tool". We believe this may occur due to the EMRs temporary files folder being full, the file size of the forms, and the long file path of forms.

Troubleshooting:

1. Try importing forms in smaller batches (5 or less has been found to be helpful)

2. Do not import the largest files together or import the largest files individually (i.e. separate the installation of the Inlow's and 'E2P – MH – Anxiety Disorders and Depression Visit Tool').

3. Logging out and back in of the EMR can sometimes help clear the temp folder and fix installation

4. Try placing the folder temporarily on your desktop before installing to reduce the file path.

If you are still unable to import the form and would like support, contact us at
EMRtools@ehealthce.ca.
Please take a screenshot of the error message so that was can best assist you.