

Updated: March 2025*

As part of the Evidence2Practice Ontario (E2P) program, the <u>eHealth</u> <u>Centre of Excellence</u> 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 <u>EMRtools@ehealthce.ca</u> and we will be happy to help!

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Evidence2Practice Ontario (E2P) Tool Installation Guide

A. Import the Custom Forms

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

🔹 PS Suite® EMR (TEST)					—		\times
File Settings Reports Messages Window Help 🛛 🏟 🕶 🗹								
Dr. Catherine Luangxay								
Logout Appointments	Patients Inpa	tients Clients	Addre	ss Book	Handouts	Messa	ages	Records
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Patient Recor	d - Test, T	wilight						
File Edit Style	Settings	Patient Vi	ew	Data	Letter	(ب	Z	_
Choose Patient	Ed	it Stamps						
<	Ed	it Custom F	orn	ns				
Family Hx	Edit Searches					T		
	Ed	it Cohorts						
Problem List	Ed	lit Reminder	rs					

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

e File	Forms			
File	New Custom Form New Encounter Assistant Edit Form Rename Form Duplicate Form Deactivate Form	Ctrl+N Ctrl+Shift+N Ctrl+E Ctrl+R Ctrl+P		Create Encounter Assistant Create Form Edit Form Duplicate
	Import Form(s)			
	Export Form(s) Show Revision History			
	Show Deactivated Forms			
	Restore from Automatic Sav	e		

- 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.
- 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.



Click "Checked" in the box on the right.



B. Import Flowsheet

 In PS Suite EMR, from the Records window, choose View > Show Flowsheet. File Edit Style Settings Patient View Data Letter 🎨 🗹



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

Add Flowsheet for this Patient Add Global Flowsheet	Ctrl+A	eet f	or Mya Test		\sim	
Rename This Flowsheet Delete Flowsheet						
Print	Ctrl+P					
Utilities	>		Import Flow	wsheet Ten	nplate	
			Export Flov	vsheet Tem	plate	
			Export as T	ab Delimite	ed	
			Export as H	ITML		

- 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

- File Edit Style Settings Patient View Data Letter 🏟 🗹 11. In PS Suite EMR, ✓ TEST, Paula from the Edit Stamps... Edit Custom Forms... Records Edit Searches... window, Edit Cohorts... choose dm Edit Reminders... Settings > Edit Reminders. Edit Reminders of Paula TEST No known New Quick Individual Reminder for Paula TEST ... New Alert for Paula TEST ... Patient pro 🔍 Increase Text Size Ctrl+1 Flu Shot Decrease Text Size Ctrl+↓ Needs BP Criccia
- 12. Click **New Reminder** at the bottom.

Edit Reminders					×
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>> <enter search="" text=""></enter>	-				
Reminders					
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Bisphosphonate test					
CDM - Reminder					
CEP Falls Toolbar					
CEP Fall Toolbar Reminder					
Chronic Non Cancer Pain CNC					
Cond_BMD-Osteoporosis Oste	~				
Show Intervention as Reminder:					
Show Custom Form or Stamp:	N/A			\sim	
Priority: O High (scan d	aily)	O Medium (reminder re	port)	O Low (next visit)	O Ignore (do not evaluate)
Delete Reminder		N	ew Reminder		Done

 Enter "E2P
 Toolbar" as the name for the reminder.
 Then click Add Line. 🔹 Edit Reminders

<enter search="" text=""></enter>	Re	eminder Name: E2P Toolbar		
Reminders				
2P Toolbar	~			
AB-COVID-19 Toolbar				
FHTO Opioid Only PSS Front				
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14. Click Other > Current User Initials >

contains > enter PSS initials.

Add Search Criterion			
Demosratia			
Demographics	Current Doctor Initials	contains	AAV
Patient Profile	Current User's Role	contains the word	
VISITS	Current User Initials	does not contain the word	
vitais	Today's Date	does not contain	
Immunizations		IS	
Ireatment		is not	
Allergies		is empty	
CPP Problems		is not empty	
CPP Past Medical History		starts with	
CPP Family History		enas with	
CPP Risk Factors			
Lab Values			
Lab Text			
Diagnostic Imaging			
Diagnostic Test Reports			
Consultation Report			
Miscellaneous Letters			
Medical Report			
Custom Forms			
Cohorts			
Pending Tests/Consults			
Bills			
Appointments			
All Text Notes			
Other			
Restrictions			
Nested Reminder			
Scoring			

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

Edit Reminders

Edit			
		Reminder Name: E2P Toolbar	
Reminders		Current User Initials contains CL	
E2P Toolbar	^	N	
1AB-COVID-19 Toolbar			
AFHTO Opioid Only PSS Front			
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bipolar tracking			
Bisphosphonate test			
CDM - Reminder		Delete Line	Add Line
Chronic Non Cancer Pain CNC			
CND OHT IFMT - Frailty Remin		Indent Line -> Edit Line	<- Outdent Line
Cond_BMD-Osteoporosis Oste			
Cond_bw banadic Surgery M	~	Comments:	
\bigcirc Show Intervention as Reminder:			
Show Custom Form or Stamp:		2P - Toolbar 🗸 🗸	
Priority: O High (scan da	aily	Medium (reminder report) O Low (next visit)	◯ Ignore (do not evaluate)
Delete Reminder		Cancel Add	Done

 \times



D. New Tool Version Process

After you have downloaded the updated tool package, follow these steps to <u>import the tool</u> 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.





To customize t	he SOAP note stamp to	a different stamp follow t	hese instructions.
If you would li	ke to use the default sto	amp developed by E2P, plea	ase skip this step.
,			ronouns
1. Click on the	Form settings - customization and localization	n settings	Current User
custom stamp	Changes MUST be made and saved in form editor mode. Custo SOAP note stamp customization	omizations will be reflected site-wide for all users	Patient Doctor
box	Enable only ONE checkbox	1. Select option 2. Stamp name	Family Doctor
b chu	Default E2P stamp will be selected otherwise	None (Al Scribe)	Address Book Entry
In the window on	Custom form resource localization	All steps (1-3) MUST be completed for link to appear.	Patient Patient Search Patient Deminder
in the window on	1. Select Type 2. Input display labe	3. Add Resource Name (website or custom form)	Name Value
the right, scroll	website custom form test website custom form google	www.ehealthce.ca rwww.google.ca	Show Edit Text Border
down to the line	website custom form llabs	2013 Lab Requisition resource name	Compact Stamp Text
for "Checked".	website custom form label	resource name	Graph Date Field Id Resource Name
	imaging referral targets website custom form label	resource name	Tab Order 0 Radio Button
Then click on the	website custom form label	resource name	Checked Unimedee 10
	vebsite Custom form laber	resource name	Event Triggered undoUserEditsInLaunchMode
box next to it to			-announcepta P
check it off.			
2. Stamp name	Form pottings - quatemization and locali	pecify_Text_Vital"@Hfdiagnosis".t	ext (080 Score reminder value
Click on the	Changes MUST be made and saved in form editor mode	e. Customizations will be reflected site-wide for all users	bp Breast_Cancer_Screening_Refused
onreanending	SOAP note stamp customization		The chil
corresponding	Enable only ONE checkbox Resource must be completed if customizing	1. Select option 2. Stamp name	Chol_and_RBG OHOL_RBG OHOL_RBG OHOL_RBG OHOL_RBG
blank box.	Default E2P stamp will be selected otherwise	None (Al Scribe)	Onic an vertex template Onic an vertex template Onic an vertex template Onic an vertex template
	Custom form resource localization		CNCP_Adverse_Childhood ONCP_Demographic_and_Social
On the top right	Referral targets 1. Select Type 2. Input displa	ay label 3. Add Resource Name (website or custom form)	ONCP_FS ONCP_functor_hx ONCP_functor_hx ONCP_functor_hx
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Scroll down to	[imaging referral targets		Event Handlers Tookip Text
the Stamps	website custom form label	resource name	Section ID settings Text chf Font Name Helvetica
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to embed.			
Then on the			
bottom right half			
of the window:			
Scroll down to			
the line for			
"Iext".			
Then enter the			
name of the			
stamp vou			
wish to add			



lf you are	using Al Scribe, y	ou may v	wish to disable t	he stamp	functionali	ty.
, Click on the box	Form settings - customization	and localization se	pecny_rext_vitar @mai	agnosis .text_or_iatest	Pronouns	, ,
for	Changes MU ST be made and saved in for	rm editor mode. Customiza	ations will be reflected site-wide for all users		Current Doc	tor
	SOAP note stamp customization Enable only ONE checkbox		1. Select option 2. Stamp	oname	Referring Do Family Docto Profile	octor vr
None (Al Scribe)	Resource must be completed if cus	tomizing	custom stamp		Address Boo	k Entry
	Custom form resource localization	on	All steps (1-3) MUST be completed for	link to appear	Patient Prop Patient Sear	erty ch
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Then click on the	website custom form	abel	resource name		Keyword for Selection	undol tearEdit Ini sunchMode
box next to it to					Custom Height	9
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To	customize the fo	orm resou	irces, follow the	ese instruc	ctions.	
To set a website ref	erral or Imaging	g referral	targets, follow t	hese steps	S:	_
1. Select Type:	Form settings - customizati	on and localization	on settings	r all users	Pronouns	
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"Checked"	website custom form	label	resource name		Graph Date Field Id Resource Name	1
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E2P Tool Installation Guide

TELUS PS Suite EMR

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	website custom form	label label	resource name	Size 9 Style plain Visith 150
the right, scroll	website 🔳 custom form	label	resource name	Required Show Edit Text Border
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for custom form.	Resource must be completed i	f customizing	custom stamp	Tooltip Text Section ID settions
• In the window	Default E2P stamp will be sele	cted otherwise	None (Al Scribe)	Text vvebsite Font Name Helvetica
on the right,	Referral targets		All steps (1-3) MUST be completed for link to app	201 Size 9 Style plain
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• Then click on	imaging referral targets	label	1050U/50 0 3000	Diameter 10 Keyword for Selection
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2 Input display	Form settings - customiza	ation and localization	settings	Caculated
labol	Changes MUST be made and saved	l in form editor mode. Custom	izations will be reflected site-wide for all users	Name Value
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for " Text "	website custom form	label	resource name	Style plain Width 100
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referral you	website custom form	label	resource name	Draw the Border C
wish to add.				Stop When Tabbing



3. Find the form	
name:	Image: Second s
	Only show forms containing weight log Create Encounter Assistant
Go to the forms	CHF Sept 2017 for demo only Heart Failure Visit Tool QBIC - new layout Heart Failure Visit Tool QBIC - oncinanal layout 1
search bar, select	HE Wednik log
the custom form,	Paliative Form QBIC CHF backup QBIC CHF backup Rename Form CBIC Constitue
riaht-click, and	QBIC Congestive H Duplicate Form QBIC Congestive H Deactivate Form
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Form."	
Copy (Ctrl +C) the	
form name Then	
click cancel to	
close the window	◆ Progres Input × ×
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box.	Referral targets 1. Select Type 2. Input display label 3. Add Resource Name (website or custom form) Text UHF Weight log
	W website Custom form test www.ehealthce.ca Ford Name Hendlica W website Custom form concernance Size p W website Custom form concernance Size p
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the right, scroll	website custom form label HF Weight log Include in Protocol
down to the line	imaging referral targets
for " Text ".	website custom form label resource name Tab Order 0 website custom form label resource name Edable 0
	website custom form label resource name Machine Resource name Resour
Paste (CTRL +V)	
the name of the	
referral you wish	
to add.	
Navigate to the	Edit E2P - HF - Visit Form PSS
top left corner to	File File Curtary Form
save your work!	File Edit Custom Form
	Save Ctrl+S Text_Vital"NYHA".text_of_latest
Or use your	E Test Print Ctrl+P
keyboard CTRL+S	Italian settings - customization and localize
to Save.	
	Close Ctrl+W



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





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 <u>EMRtools@ehealthce.ca</u>.

Please take a screenshot of the error message so that was can best assist you.

×

