

Disclaimer

Please allocate **60-75 minutes** for this installation process and note that it is crucial that <u>ALL lab results are added</u> to optimize functionality. The change management team at the eHealth Centre of Excellence (supporting the E2P program) would be happy to help if require assistance with installation. Please reach out to <u>EMRtools@ehealthce.ca</u> to schedule a time.



Table of Contents

Downloc	ading the E2P COPD Management Tool	2
Configu	ring Form Elements	3
1.1 C	Creating the Generate Letter	3
1.1.1	E2P COPD Visit	3
1.2 C	Creating the Lab Test: E2P_MGMT	5
1.2.1	E2P_COPD	6
1.2.2	E2P_COPD_SCREENING	8
1.2.3	dxStatusCOPD	9
1.3 C	Creating the Lab Test: COPD (E2P)	10
1.3.1	FEV1% predicted (post)	11
1.3.2	FEV1/FVC (post)	13
1.3.3	LLN (FEV1/FVC)	
1.3.4	CAT	16
1.3.5	mmrc	17
1.3.6	AECOPD (mild, moderate, severe)	
Mapping	g Form Elements	
1.4 E	2P – COPD – Screening & Diagnosis	
1.5 E	2P – COPD – Visit Form	
New Too	I Version Process	
Feedbac	ck	
Contact		



Downloading the E2P COPD Management Tool

From the Accuro EMR click on the Accuro target menu icon.

Select **Tools** followed by **Form Editor** to launch the form editor window.

Within the Form Editor, click the top left **Tools** button and

Publish/Download option.

select the

Scheduler Tools Jeports	Patient Summary Patient Appointment View	F3	
iools Veports	Patient Appointment View		
leports		F4	
(oporto	Quick Patient Documents View	F2 ∧ F3 F4 F5 F6 Ctri+F10 Alt+F2 Ctri+F11 F9 Ctri+F9 Ctri+F9	
	Quick New Patient		
Jilling	Quick Patient Actions	Ctrl+F10	F2 ^ F3 F7 F5 E F7 F7 F7 F7 F9 ✓
sers	Search Family Link		
felp	Address Book	Alt+F2	
DS	Add/View Patient Tasks	F7	
Configuration	New Clinical Note	Ctrl+F11	2 3 4 5 ≡ 0 2 7 1 9 9 9 ×
	Open Chart Sheet	F2 ∧ F3 F4 F5 F6 Ctri+F10 F7 Ctri+F11 F9 Ctri+F9 Ctri+F9	
	Batch Chart Sheets	Ctrl+F9	
	Automated Chart Sheet Printing		
	Templete Wizerd		
	+ Indate		
			Ŷ
ACCORO			
EMR			

The Form Publisher window will open. To find the tools:

- 1) In Red, you enter "E2P" into the search bar.
- 2) Select "E2P COPD Screening & Diagnosis" and click download.
- 3) Select "E2P COPD Chronic Obstructive Pulmonary Disease Tool" and click download.
- 4) Select "E2P COPD Action Plan" and click download.

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Repository Detable	\sim
Download Forms Publish Forms	
E2P Q	
SpecialtyAll	
PublisherAll Category Standard Forms ~	
Form Description Specialty Date Publisher Keywords	
E2P - COPD - Chronic Obstr https://loom.ly/j9PRtZ8 General 2024-Jul-18 ehealthcoedev copd, chronic of	is
E2P - COPD - Screening & https://loom.ly/j9PRtZ8 General 2024-Jul-18 ehealthcoedev copd, screenin	g,
E2P - COPD action plan https://loom.ly/j9PRtZ8 General 2024-Jul-18 ehealthcoedev copd, action plan	in,
V Preview Downloa	1
Close	



Configuring Form Elements

1.1 Creating the Generate Letter

1.1.1 E2P COPD Visit





Click on the green plus button to add a new template. Title it: "E2P COPD Visit" . Place your cursor in the letter area. Using your keyboard, click "CTRL + V" to paste the copied text.	Template Wards Template Marces Anne Back Name Back Name Back Name Cocean Attachments Parkage Anthe Parkabases Cocean Attachments Parkage Cocean Attachments Parkage Cocean Attachments Parkage Cocean Attachments Cocean Attachments
Searching for all the text within the blue lines "[]", then click on each text option to highlight them. Ensure to scroll to the bottom of the page to highlight the remaining text. Then click "Save Changes" .	Title E2P COPD Visit Type



1.2 Creating the Lab Test: E2P_MGMT

*Please note that if you already have another E2P tool you will not need to create another Lab Test for E2P_MGMT and you can skip to page 6 (to the top of the next page).

i. Navigate to the EMR menu option then select **Encounter notes**.

¢		Accuro CMS5 2017.6	541 - The Centre	e for Family Medicin	ne FHT	T eHealth Centre of Exc	ellence	***	Client Services	- 1.866.729.8889***
	Day Sheet Encounter Notes Virtual Char	art Medications Patient	t Information							
	😝 03/22/2023 🛗 🚺 Today	y 💽 Test, Bradle	y ¥ 🗳							
1	Time Physician Pa	atient Age	Reason	Note		Referring and Family	Insurer	☆	Bill	Bill Note

- ii. Select a test patient, which will reveal the notes, standard forms, and the lab section where the normal labs are listed.
- iii. To manage Lab Tests, click on the green plus button (*Lab Test in Accuro represents a Group of Test Results).



To create the first lab test, Click the **green plus button**.

Then Enter the name for the new Lab Test: **"E2P_MGMT"**.

Then click **OK**.

>	Lab Tests	L
Test Search		Q
ALCC (Lange	Input	× Pric)
All Tests (Man Antenatal Visit	the name of the new Test: 2 MGMT	ed, Numeric) timed, Numeric)
Blood_Panel (1 BP (Manual)	OK Cancel	(Optimed, Numeric)
CHOL Panel (Optimed)	eGFR (Opt	timed, Numeric)
E2P_MGMT (Manual)	LDL (Optin	nd, Numeric) ad, Numeric)
HbA1C (Manual)	HGB (Opti	med, Numeric)
		OK Close



If you have an existing	\$	Lab Tests
E2P tool, please pick	Test Search	Q
back up here:	Select a Test Name:	
Navigate to the E2P_MGMT lab test, then click on the pencil icon to edit.	CHOL Panel (Optimed) Custom Test (Manual) E2P_Labs (Manual) E2P_Labs1 (Manual) E2P_MGMT (Manual) E2P_MGMT (Manual) E2P_MGMT2 (Manual) eGFR (Manual) HbA1C (Manual)	
		OK Close

This should open the Edit Lab Test Window.

Click the green plus sign to add the Lab Value.

• \$ •	Edi	t Lab Test
E2P_MGMT		
Test Results		
0	8	00
LOINC Number		
Source:	Manual	
Source Code		
Category	Default	¥
		OK Close
		OK Close

1.2.1 E2P_COPD

From here click New .	Lab Result Search			×
Title it: "E2P_COPD".	Result	Source	Data Type	Units
	Primary Results Only Show Lab Test Creation Date Range From MM/DD/YYYY To	Input Enter the name E2P_COPD OK	of the new result. Cancel	New OK Cancel



Edit the Result window						
will open	💠 Edit Result			×		
Entor the following:	E2P_COPD					
	s					
	Sou	rce Code:				
Then eliek #OK #	Data 1	Type: Numeric Text	There are a couple rules to keep in mind			
THEIT CIICK UK .	Numeric Settings			and observations of it.		
	Reference Ranges:		 You cannot change the data type of a result once an observation 			
	Laboratory Gende	r Age Refer	ence Range	of it has been recorded. 2. Changing the Reference Ranges and		
				Units of a result doesn't affect already recorded observations and		
				is only used for entering new manual lab observations.		
	Linkir	ng OK Cancel				
Important Click on	💠 Lab Result Search			×		
the E2P_COPD result				Q		
line.	Result	Source	Data Type	Units		
	E2P_COPD	Manual	Text			
Click OK to add it to the						
Lab Test.						
	Primary Results Only					
	Show Lab Test					
	From MM/DD/VVVV To	MM/DD/XXXX				
				New OK Cancel		
	A		I			
Then click the green	E2P MGMT	*				
plus sign to add the	Test Results					
next Lab Value.	E2P_COPD (Manual, Text)					
		00				
	LOINC Number					
	Source: Manual					
	Source Code					
	Category Default	~				
		OK Close				



1.2.2 E2P_COPD_SCREENING

From here click New .	♦ Lab Result Search ×
	Q
Title it:	Result Source Data Type Units
"E2P_COPD_SCREENING"	
	Input ×
	Enter the name of the new result: E2P_COPD_SCREENING
	ОК Сапсеі
	Primary Results Only Show Lab Test
	Creation Date Range
	New OK Cancel
Edit the Result window will	
open.	Edit Result E20 CODD SCREENING
Enter the following:	Source: Manual
Data Type: Text	Source Code:
	Data Type: Numeric Text There are a couple rules to keep in mind about the relationship between a result
Then click "OK" .	Numeric Settings and observations of it. Units: 1. You cannot change the data type
	Reference Ranges: of a result once an observation of it has been recorded.
	Laboratory Gender Age Reference Range 2. Changing the Reference Ranges and Units of a result doesn't affect already recorded observations and
	is only used for entering new manual lab observations.
	Linking OK Cancel
Click on the	♦ Lab Result Search ×
E2P_COPD_SCREENING	Q
result line.	Result Source Data Type Units E2P_COPD_SCREENING Manual Text Image: Compare the second
Then click OK to add it to the	
Lab Test.	✓ Primary Results Only □ Show Lab Test
	Creation Date Range
	From MM/DD/YYYY To MM/DD/YYYY
	New OK Cancel
Then click the green plus sign	to add the next Lab Value.



1.2.3 dxStatusCOPD

From here click New .	🚸 Lab Result Search			×
Title it: " dxStatusCOPD "				Q
	Result	Source	Data Type	Units
	Primary Results Only Show Lab Test From MM/DD/YYYY To		he name of the new result: usCOPD K Cancel	New OK Cancel
Edit the Result window	Culla Descula			×
will open.	- Edit Result	dxStatusCOPD		X
 Data Type: Text 	s	ource: Manual		
	Sour	rce Code:		
Then click "OK" .	Data T	Type: O Numeric	Reference Range	 There are a couple rules to keep in mind about the relationship between a result and observations of it. 1. You cannot change the data type of a result once an observation of it has been recorded. 2. Changing the Reference Ranges and Units of a result doesn't affect already recorded observations and is only used for entering new manual lab observations.
Click on the				
dxStatusCOPD result line.	💠 Lab Result Search			×
Then click OK to add it to				
the Lab Test.	dxStatusCOPD	Manual	Text	Units
	Primary Results Only Show Lab Test Creation Date Range From MM/DD/YYYY To			New OK Cancel



Then click OK to save	♦ Edit Lab Test ×
	E2P_MGMT
your work.	Test Results [22, COP(Manual, Text)]
,	E2P_COPD_SCREENING (Manual, Text)
	on-disting Prof. In (instantion's year)
	LONC Number
	Source: Manual
	Source Code
	Category Defaut ~
	OK Close

1.3 Creating the Lab Test: COPD (E2P)

We recognize that some users may be using CDM worksheets, so we designed our tools to be able to work with the CDM worksheets and without them.

To identify if your site has them enabled, open your EMR and refer to this image:

Day She	et Encounter Notes Virtual Chart Medications Patient Information	
	07/11/2024 🛗 【 Today Doctor, David 🖌 📌	
Day She	et Encounter Notes Chronic Conditions Virtual Chart Medications 07/11/2024	Patient Information
To create the second lab	🚸 Lab Tests	×
test, click the green plus	Test Search	Q
button.		
Enter the name for the	Select a Test Name:	
new Lab Test: "COPD	E2P_Labs (Manual)	
(E2P)"	E2P_MGMT (Manual)	
() ·	A1CC (Manual)	
Then click OK	Antenatal Visit (Optimed)	
men click OR .	Blood (Manual)	
The Following Teach Million and	Blood_Panel (Manual)	
The Edit Lab Test Window	BP (Manual)	
should open.	COPD (F2P)	
Click the green plus sign		01/ 01/22
to add the Lab Value.	X	UK Close



1.3.1 FEV1% predicted (post)

From here click New.	
	♦ Lab Result Search ×
Title it: "FEV1% predicted	
(post)".	Result Source Data Type Units Input × Enter the name of the new result. FEV1% predicted (post) OK
	Show Lab Test 🚯
	New OK Cancel
Edit the Result window will	
open.	♦ Edit Result ×
Enter the following:	FEV1% predicted (post)
• Data Type: Numeric	Source: Manual
• Units: %	Data Type: Numeric Text There are a couple rules to keep in mind
	Numeric Settings
Important	Units: % 1. You cannot change the data type
If CDM worksheets are not	Laboratory Gender Age Reference Range 2 Changing the Reference Range
enabled, click "OK" here	Units of a result doesn't affect already recorded observations and
and then skip to Step B).	is only used for entering new manual lab observations.
If CDM Worksheets are enabled, click "Linking", then pause here and proceed to Step A) .	Ves CDM No CDM
Step A)	
The lab result linking	🚸 Lab Result Linking X
window will open.	Add all the results that should be graphed togther:
1. Click the green	Primary Result Source Data Type Units
plus sign.	Previo predicteo Manual Numeric
	Show Lab Test
	Set Primary Result OK Cancel



2	Enter "FEV1" into	🔶 Lab Result Sear	:h						;	×
2.	the search bar and	FEV							Q	1
		Result		Source		Data Type		Units		1
		FEV1 %		Optimed		Numeric	9	%		
	magnifying glass	FEV1 (after puff) - (FEV1 (before puff) -	personal be (personal b	Optimed Optimed		Numeric Numeric	L	iters.		
	to search.	FEV1 / FVC ratio (be	fore puff)	Optimed		Numeric	9	% itoro		
3.	Select "FEV1% of	FEV1% (after puff)		Optimed		Numeric	9	%		1
	predicted (after	FEV1% (before puff FEV1% of predicted) (before puff)	Optimed Optimed		Numeric Numeric	9	%		
		FEV1% predicted		Optimed		Numeric	9	%		1
	puff)".	FEV1/FVC (post)		Manual		Numeric	9	% %		
	Ensure the source	Primary Results	Dnlv							
	is " Optimed "	Show Lab Test	0							
4	Click "OK"	Creation Date Rang	e							
ч.		From MM/DD/YY	YY To MM	I/DD/YYYY						
								OK	Cancel	
								- OK	Current	
5	Ensure the FEV1%	🔶 Lab Result	t Linking						×	<
0.	prodicted (post)	A did all the second	He that a b		- h - d to eth					
	predicted (post)	Add all the resu	its that sho	ould be gra	apned togtner:					_
	result line	Primary	Result		Source	Data Ty	pe	Units	^	
	(Manual) is set as		FEV1% o	f predict	Optimed	Numeric			_	
	the Primary Result .	Р	FEV1% p	redicted	Manual	Numeric				
6	Click "OK"									
0.									~	
		Show Lab	Test 🚺							
		Set Primary	Result					ОК	Cancel	1
										-
Step B		💠 Lab Result Searc	h					-		×
CIICK									~	
predic	ted (post) result line	Result FEV1% predicted (po	ist)	Source Manual		Data Type Numeric		Units %		1
Then c	click OK to add it to									
thold	h Toot	Primary Results (Dnly							
		Creation Date Rang	e							
		From MW/DD/000								
								New OK	Cancel	
Then c	lick the green plus sia	n to add t	he ne	xt Lab	Value.					
-	5 1 3 3		-							



1.3.2 FEV1/FVC (post)

From here click New. Title it: " FEV1/FVC (post) ".		e of the new result: sti Cancel New OK Cancel
Edit the Result window will open. Enter the following: Data Type: Numeric Units: % *Important* If CDM worksheets are not enabled, click "OK" here and then skip to Step D). If CDM Worksheets are enabled, click "Linking", then pause here and proceed to Step C).	FEV1/FVC (post) Source: Manual Source Code: Data Type: Numeric Otata Type: Numeric Inits: % Reference Ranges: Laboratory Gender Age Reference Ranges: Laboratory Gender Age No Composition Composition Linking OK	There are a couple rules to keep in mind about the relationship between a result and observations of it. ference Range ference Range Changing the Reference Ranges and Units of a result doesn't affect already recorded observations and is only used for entering new manual lab observations.
Step C) If CDM Worksheets are enabled follow these steps: 7. Click the green plus sign.	Lab Result Linking Add all the results that should be graphed togthed Primary Result Source Primary FEV1/FVC (post) Manual Show Lab Test Set Primary Result	er: Data Type Units Numeric V OK Cancel

Evidence2Practice Ontario Accessible. Actionable. Adaptable.

8. Enter "FEV1 / FVC" into the search bar FEV1 / FVC Result and **click** the Data Type Units Source FEV1 / FVC ratio (after puff) Optimed Numeri magnifying glass to search. 9. Select "FEV1/FVC Primary Results Only Show Lab Test ratio (after puff)". Creation Date Range Ensure the source is From MM/DD/YYYY To MM/DD/YYYY "Optimed". Cancel ОК 10. Click "OK". 11. Ensure the FEV1/FVC Lab Result Linking (post) result line Add all the results that should be graphed togther: (Manual) is set as ۸ the Primary Result. Primary Result Source Data Ty... Units Optimed FEV1 / FVC ratio (after puff) 12. Click "OK". Numeric Ρ FEV1/FVC (post) Manual Numeric 08 Show Lab Test 👔 Set Primary Result OK Cancel Step D) Click on the FEV1/FVC 🔶 Lab Result Search (post) result line. Q Result Source Data Type Units FEV1/FVC (post) Manual Then click **OK** to add it to the Lab Test. Primary Results Only Show Lab Test 🗊 Creation Date Range From MM/DD/YYYY To MM/DD/YYYY ОК Cancel New Then click the green plus sign to add the next Lab Value.



1.3.3 LLN (FEV1/FVC)

From here click New.	💠 Lab Result Search X
Title it: " LLN (FEV1/FVC) ".	
	Result Source Data Type Units
	Input
Edit the Result window will	
open.	♦ Edit Result
Enter the following:	LLN (FEV1/FVC)
Data Type: Text	Source: Manual
	Data Type: Numeric Tree are a couple rules to keep in mind
Then click "OK" .	Numeric Settings and observations of it.
	Units: 1. You cannot change the data type Reference Ranges: of a result once an observation
	Laboratory Gender Age Reference Range Jaboratory Gender Age Reference Range Comparison Changing the Reference Range Units of a result doesn't affect already recorded observations and is only used for entering new manual lab observations. Comparison OK Cancel
Click on the LLN(FEV1/FVC)	
result line.	Cab Result Search
Then click OK to add it to the	Result Source Data Type Units LLN (FEV1/FVC) Manual Text
Lab Test.	
	Primary Results Only
	Show Lab Test
	Creation Date Range
	New OK Cancel
Then click the green plus sign	to dad the next lab value.



1.3.4 CAT

Г

From here click New. Title it: " CAT "	💠 Lab Result Search			×
	Result	Source	Data Type	Units
	Primary Results Only Show Lab Test Creation Date Range From MM/DD/YYYY		the name of the new result:	New OK Cancel
Edit the Result window will				
open.	🔶 Edit Result	CAT		×
Enter the following:		Source: Manual		
Data Type: Numeric	s	ource Code:		
• Units: /40	Dat	ta Type: 🔘 Numeric 🔿 T	Text a	There are a couple rules to keep in mind about the relationship between a result
Then click "OK" .	Numeric Settings Units: [40 Reference Ranges: Laboratory Gen	ider Age	Reference Range	 You cannot change the data type of a result once an observation of it has been recorded. Changing the Reference Ranges and Units of a result doesn't affect already recorded observations and is only used for entering new manual lab observations.
	Li	nking OK Car	ncel	
Click on the CAT result line.	💠 Lab Result Search			×
Then click OK to add it to the				Q
Lab Test.	Result CAT	Source Manual	Data Type Numeric	Units /40
	Primary Results Only			
	Show Lab Test			
	From MM/DD/YYYY			
				New OK Cancel
Then click the green plus sign	to add the ne	ext Lab Value	9.	



1.3.5 mmrc

From here click New .	💠 Lab Result Search 🛛 🗙
Title it: " mmrc ".	
	Result Source Data Type Units Input X Enter the name of the new result:
	New OK Cancel
Edit the Result window will	♦ Edit Result
open.	
Enter the following:	Source: Manual
Data Type: Numeric	Source Code:
 Units: 	Data Type: Numeric O Text about the relationship between a result and observations of t.
• 01113. •	Units: 1. You cannot change the data type
Then click "OK" .	Reference Ranges: of a result once an observation of a result once an observation of a thas been recorded. Laboratory Gender Age Reference Range 0. Units of a result doesn't affect aiready recorded observations and is only used for entering new manual lab observations. 1. 1.
	Linking OK Cancel
Click on the mmre result line	♦ Lab Result Search X
Then elick OK to add it to the	
	Result Source Data Type Units
Lab Test.	mmrc Manual Numeric .
	Primary Results Only
	Show Lab Test
	New OK Cancel
Then click the green plus sign	to add the next Lab Value.



1.3.6 AECOPD (mild, moderate, severe)

From here click New. Title it: " AECOPD (mild, moderate, severe) ".	▶ Lab Result Search Result Source Data Type Units Input Imput Imput Imput Imput Primary Results Only OK Cancel Show Lab Test OK Cancel From IMDDD/YYYY To IMMDDD/YYYY New
Edit the Result window will open. Enter the following: • Data Type: Text Then click "OK" .	★ Edit Result ★ AECOPD (mild, moderate, severe) Source: Manual Source Code:
Click on the AECOPD (mild, moderate, severe) result line. Then click OK to add it to the Lab Test.	Lab Result Search Result Source Data Type Units AECOPD (mid, moderate or seve)Manual Text Primary Results Only Show Lab Test Creation Date Range From IMMDDD/YYYY New OK Cancel



Then click OK to save your	♦ Edit Lab Test
work.	COPD Test Results FEV1% predicted (post) (Manual, Numeric) FEV1/FVC (post) (Manual, Numeric) LLN (FEV1/FVC) (Manual, Text) CAT (Manual, Numeric) MECOPD (mid, moderate or severe) (Manual, Text) CAT (Manual, Numeric) AECOPD (mid, moderate or severe) (Manual, Text) CAT (Manual, Numeric) CAT (Manual, Numeric)
Then click the top right X	💠 Lab Tests 🛛 🗙
button OR Close to close the	Test Search
next window.	Select a Test Name:
	E2P_Labs (Manual) Image: Comparison of the comparison of

Mapping Form Elements

1.4 E2P - COPD - Screening & Diagnosis

	File	Configure Providers	F2 ^
Choose loois then form	Scheduler	Patient Summary	F3
Editor	Tools	Patient Appointment View	F4
	Penorts	Quick Patient Documents View	F5
	Reporta	Quick New Patient	F6 ≡
	Billing	Quick Patient Actions	Ctrl+F10
	Users	Search Family Link	
	Help	Address Book	Alt+F2
	CDS	Add/View Patient Tasks	F7
	Configuration	New Clinical Note	Ctrl+F11
	comgaration	Open Chart Sheet	F9
		Batch Chart Sheets	Ctrl+F9
		Automated Chart Sheet Printing	
		Form Editor	
		Template Wizard	
		+ Update	~
		🗎 🗐 🖂 🏗 C	



Look for the E2P COPD Tool in the Standard Forms list . Click on the tool name line to select the tool.	Standard Forms Forms Image: E2P - COPD - Chronic Obs Image: E2P - COPD - Screening & Image: E2P - COPD - Screening & Image: E2P - COPD - Tips & Trick Image: E2P - COPD - Visit Form v2 Image: E2P - COPD action plan Image: E2P - COPD action plan
Once the tool appears, following the red highlighted area, click: "completed" Right-click and select Edit .	E2P_MGMT, E2P_COPD_SCREENING-> completed Edit E2P_MGMT, E2P_MGMT, E2P_ Edit ically suspected of having COPD if they have at lea Image: Copy of they have at lea Image: Copy of they have at lea Screen patients for at least one respiratory symptor Remove Bring Forward Bring Forward Send Back
On the left panel, select: TextField - completed On the right panel, Click Lab Test and select "E2P_MGMT". Click Lab Result and select "E2P_COPD_SCREENING (Manual, Text)". Important* Click Save and then click OK.	Component Editor [172, 16) Image: Component Editor [172, 16] Name TextField Image: Component Editor [172, 16] Author Optimed Software Image: Component Editor [172, 16] Signature OutfrextField Image: Component Editor [172, 16] Background Penents Properties Layout Style Horizontal Image: Component Editor [172, 16] Issent Style E2P MGMT, E2P COPD SCREENNG- Image: Component Editor [172, 16] Issent Style E2P MGMT, E2P COPD SCREENNG- Image: Component Editor [172, 16] Issent Style E2P MGMT, E2P COPD SCREENNG- Image: Component Editor [172, 172] Issent Style E2P MGMT, Manual [Image: Early Labor [Image
Returning to the tool, Click: " Screening last completed" . Right-click and select Edit .	E2P_MGMT, E2P_COPD_SCREENING-> Screening last completed:



On the left namel select:	💠 Component Editor (554, 41)	
On the left panel, select.	Name Screening Version 1	Type Query V
Query - Lab Result Date	Description Refers to E2P Screening Form Author	Tag Name screeningDate Reportable
On the right panel	Signature 147 Hidden When Viewing Form	Query Lab Result Date
On the light pariel,	Background Elements Properties Layout Style Horizontal ~	Lab Test E2P_MGMT (Manual) V Lab Result E2P_COPD_SCREENING (Manual, Te V
Click Lab Test and select	Label Screening last completed: Query Lab Result Date	Patient Lab Most Recent
"E2P_MGMT".		Only use observations from this test AND result
Olicit Late Descriptions of each at		Enable HopupEDE
Click Lab Result and select		* The Most Recent E2P_COPD_SCREENING (Manual, Text) Lab Result Date from any lab test on the patient chart.
"E2P_COPD_SCREENING	-	
(Manual, Text)".	A	Font Save 1
		OK
Important* Click Save and		
then click OK .		
	<u> </u>	
Scroll to the bottom of the pag	je.	
Click the area to the left of the	red highlighted box titled: "dxSt	atusCOPD".
Right-click on the blue area/te	extbox and select Edit.	
opdate	status: U	atuscopo
	1	
dxStatusCOPD Step 1/3:	Component Editor (5, 496)	×
On the left namel select:	Name Diagnosis Version 1 (*) Type Description Diagnosis status by spirometry Name Name	Guery V
Ouery - Lab Result	Author Optimed Software Tag Nam Signature COM abel Hidden When Viewing Form	me dxStatus_screening Reportable
Query – Lub Result	Background Elements Properties	
On the right panel	Layout style inorzoniai Label Diagnosis status: Overv Lab Result	Query Lab Result ~
Click Lab Test and select	Label Label Last updated: Query Lab Result Date	Lab Test E2P_MGMT (Manual) Lab Result dxStatusCOPD (Manual Text)
	Label I Label Update status:	Patient Lab Most Recent V Only use observations from this test AND result
EZP_MGM1 [®] .	Text/Field	Enable Popup Edit
Click Lab Result and select		* The Most Recent dxStatusCOPD (Manual, Text) Lab Result from any lab test on the patient chart.
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On the right panel	Label Diagnosis status: Query Lab Result Lab H Lab Result Lab Result Lab Result Date V Lab Result Date V Lab Result D
Click Lab Test and select	Label Last updated: Lab Result Date Patent Lab Result Most Recent v
"E2D MONT"	Label Update status: Date Format (#64.MMX.9999: 15.Juli 2024 Image tp png Configure desrutions from this test AIID result
	Esable Popup E.st.
Click Lab Result and select	* The Most Recent dxStatusCOP0 (Manual, Text) Lab Result Date from any lab test on the patient chart.
"dxStatusCOPD (Manual	
	C C Font Save
Important* Click Save and the	In proceed to dxStatusCOPD Step 3/3 . <u>Do not click OK yet.</u>
	Component Editor [5,496] X
dxStdtusCOPD Step 3/3:	Name Diaprosis Version 1 💭 Type TextField 🗸
On the left panel, select:	Descrption Diagnoss status by sprometry Name dicUstatisUpdate_screening Author Optimed Software Tag Name dicStatisUpdate_screening Reportable
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Click Lab Test and select	Label Update status:
"E2P_MGMT".	rimon to pro
Click Lab Result and select	
"dxStatusCOPD (Manual,	
Text)".	O O Fot Seve
	ОК
Important* Click Save and	
then click OK .	
1. In the top left corner,	Title D- Screening & Diagnosis ~ M Category Standard Forms ~ Office -Al-
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file butten to ague	Operational Section 2000 (and a low birthweig) Patient Possian
me button to save.	Labs
	If at least one selection made in both symptoms and risk factors: refer patients for sprometry (use input field below to update status to suspect) indicate if sprometry declined (use input field below to update status to unconfirmed)
3. The Sate Form	Diagnosis status: Last updated: Update status: 0
window will open,	If diagnosis is unconfirmed, please indicate reason
click "OK" to save.	
	C Version: 0 C Page 1/1 C Verw OK Close



1.5 E2P - COPD - Visit Form

Look for the E2P - COPD Chronic Obstructive Pulmonary Disease Tool in the Standard Forms list. Click on the tool name line to open the tool.	Standard Forms Forms Image: E2P - COPD - Chronic Obs Image: E2P - COPD - Screening & Image: E2P - COPD - Screening & Image: E2P - COPD - Tips & Trick Image: E2P - COPD - Visit Form v2 Image: E2P - COPD action plan Image: E2P - COPD action plan
Once the tool appears, followin	g the red highlighted area, click: "completed"
Right-click and select Edit .	
E2	P_COPD -> completed
On the left panel, select: TextField - completed On the right panel, Click Lab Test and select	
"E2P_MGMT". Click Lab Result and select "E2P_COPD (Mapual Toxt)"	Lab Result E29_CORD (Manual, Text)
Important* Click Save and then click OK.	Fox Save
Following the red highlighted area, click: "Screening last completed:" Right-click and select Edit . E2P_COPD_SCREENING -> Screening last completed:	
On the left panel, select: Query - Lab Result Date On the right panel, Click Lab Test and select "E2P_MGMT". Click Lab Result and select "E2P_COPD_SCREENING (Manual, Text)".	Component failer (146, 41) X Inne Greening Description Autor Description Bolaground Ememts Properties Usynot Style Hotesent Data Something Description Label Something Description Label Something Description Descr
then click OK .	Fox Save



Following the red highlighted area, click: "Visit form last completed:"		
Right-click and select Edit .		
E2	P_COPD -> Visit form last comple	eted:
On the left panel, select:	Component Editor (583, 41) Name Visit last comoleted Version 1	Ture Duran J
Query - Lab Result Date	Description	Name Tag Name Unnamed 184
On the right papel	Signature 124 Hidden When Viewing Form Background Elements Properties	
Click Lab Test and select	Layout Style Horizontal V Label Vist form last completed:	Query Leb Result Date V
"E2P MGMT".	uleiy Lau Result Dale	Lab Test E2P_MGMT (Manua) ~ Lab Resut E2P_COPD (Manual, Text) ~
Click Lab Result and select		Patient Lab Most Recent Date Format dd-MMM-yyyy: 15-Jul-2024 Date Format Use observations from This test AND result
"E2P_COPD (Manual, Text)".		Enable Popup
		* The Most Recent E2P_COPD (Manual, Text) Lab Result Date from any lab test on the patient chart.
Important* Click Save and		
thên click OK .	00	East Sun
		Гин ОК
Click the area to the left of the	red highlighted box titled: "	dxStatusCOPD".
	· · · · - ••-	
Right-click on the blue area/te	xtbox and select Edit .	
Update	status: 0 <	-dxStatusCOPD
dxStatusCOPD Step 1/3:	Name Diagnosis Version 1	Type Dueny
On the left panel, select:	Author Optimed Software Signature COMLabel	Tag Name dxStatus_screening Reportable
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Click Lab Result and select		
"dxStatusCOPD (Manual,		
lext <i>j</i> ".	00	Font Save
		OK
Important* Click Save and then proceed to dxStatusCOPD Step 2/3. Do not click OK vet.		



dyStatusCOPD Stop 2/2:	Name Diaprosis Version 1 🗘 Type Duety
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On the visit terms of	Late resolutions annus. Unit as resolutions and annual and annual a
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	* The Mest Recent distance/DPO (Manual, Text) Lab Result Date from any lab test on the patient chart.
Click Lab Result and select	
"dxStatusCOPD (Manual,	
Text)".	C C Fott Save
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Click Lab Test and select	Lab Rest Date Lab Rest Date Lab Rest Date Lab Rest distantisCOP0 (Manual, Text) ∨ Label Lab
"E2P_MGMT".	Loom Upder sale: Image to prog TextField
Click Lab Result and select	
"dxStatusCOPD (Manual,	
Text)".	
	Fort Save
Important* Click Save and	
then click OK .	
On the right side of the tool:	Spirometry: ()
Ĭ	FEV1/FVC (%)
Click the area to the left of	FEV1/FVC (post)
the red highlighted box titled:	LLN*
	<- LLN (FEV1/FVC)
FEVI/FVC (post)".	FEV1(%)
	FEV1%pred(post)
Right-click on the blue area	
and select Edit .	



On the left panel, select: LabComboBox - Lab test: COPD Lab Result: FEVIFVC (post) On the right panel, Click Lab Test and select "COPD (E2P)". Click Lab Result and select "FEV1/FVC (Manual, Numeric)". Important* Click Save and then click OK. Click the area to the left of the red highlighted box titled: "<- LLN FEV1/FVC".	• Component fider (64, 17) X Name FEV/FVC Version 1/2 Obscription Index When Viewing Form Index When Viewing Form Badgemed Index When Viewing Form Index When Viewing Form Badgemed Index When Viewing Form Index When Viewing Form Badgemed Index When Viewing Form Index When Viewing Form Index Wate Wate Index When Viewing Form Index Wate Wate Wate Viewing Form Index Wate Wate Index Wate Wate Wate Wate Viewing Form Index Wate Wate Wate Wate Wate Wate Wate Wate
Right-click on the blue area and select Edit .	FEV1(%)
On the left namel select:	💠 Component Editor [654, 165] X
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LabComposox - Lab lest:	Description Lower Link of Normal Name In_control Author Optimed Software Tag Name In_control Tag Name In_control Tag Name In_control
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On the right panel, Click Lab Test and select " COPD (E2P)" .	
Click Lab Result and select	
"LLN FEV1/FVC (Manual,	
Text)".	Font Save
Important* Click Save and	OK
then click OK .	



Click the area to the left of the red highlighted box titled: "<-FEV1%pred(post)". Right-click on the blue area and select Edit.	Spirometry: Image: Construct of the system FEV1/FVC (%) LLN* Sector of the system FEV1(%)	
On the left panel, select: LabComboBox - Lab Test: COPD Lab Result: FEV1% predicted (post) On the right panel, Click Lab Test and select "COPD (E2P)". Click Lab Result and select "FEV1% predicted (Manual, Numeric)". Important* Click Save and then click OK.	Component Editor (664, 200) X Name Label Version Image: Lab Tradewine (Text) Image: Lab Tradewine (T	
Scroll down to the bottom of the page.		
Click the area to the left of the red highlighted box titled: "-> FEV1%predicted(post) (3)" Right-click on the blue area and select Edit.		



E2P COPD Tool

FEV1 Step 1/3:	Component Editor (16,749) X
On the left panel, select:	Nalle ineucasion version versi
Query - Lab Pesult	Author Optimed Software Signature COMLabel Hidden When Viewing Form
Query Lub Result	Background Bements Properties
On the right name	Label FEV1 Duery Lab Result V
On the right panel,	Ouery Lab Result Date LabComboBox Lab Test: COPD Lab Result: FEV1% predicted (post) Lab Centre COPD Lab Result: FEV1% predicted (post)
Click Lab Test and select	Patient Lab Most Recent v
"COPD (E2P)".	trig use Green examine the minimum real Anity Feature Edit
	* The Most Recent FEV1% predicted (post) (Manual, Numeric) Lab Result
Click Lab Result and select	from any lab test on the patient chart.
"FEV1% predicted (post)	
(Manual Numorio)"	
(Manual, Numeric)	Font Save
	OK
Important* Click Save and the	n proceed to FEV1 Step 2/3. <u>Do not click OK yet.</u>
FFV1 Step 2/3	Component Editor [16, 740]
On the left namel aslast	Name Medication Version 1 Type Outry v Description Name fev1 lab result dite
On the left panel, select:	Author Optimed Software Tag Name ferv_tab_result_date Reportable
Query – Lab Result Date	Signature COUILabel Hidden When Viewing Form Background Etements Properties
	Layout Style Horizontal v
On the right panel,	Outry Lab Result Outry Lab Result Outry Lab Result Outry Lab Result
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"COPD (E2P)"	Date Format dd-MMIL-9999; 15-Jul-2024 ONy use observations from this test AND result
	Enable Popup Est.
Click ligh Desult and select	* The Most Recent FEV1% predicted (post) (Manual Numeric) Lab Result Date from any lab lead on the patient chart.
"FEV1% predicted (post)	
(Manual, Numeric)".	Font Save
	OK
Important* Click Save and the	n proceed to FEVI Step 3/3. Do not click OK vet.
FFV1 Step 3/3	Component Editor [16, 749]
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on the left panel, select:	Author Optimed Software Test Internet (rev_test_state_combo
LabComboBox – Lab Test:	Signature COllLabel Hidden When Viewing Form Lab Test COPD (229)
COPD Lab Result: FEV1%	Layout Style Hortzontal Lab Result FEV1% predicted (post) (Manuel, Numeric) Useque Format Date: Value Unit
predicted (post)	Laber revit Caber Lab Result Court Caber C
	LabComboBox Lab Text COPD Lab Result FEV1% prodoted (post)
On the right panel	
Click on Test and set at	
Click Lad Test and select	
"COPD (E2P)".	
Click Lab Result and select	
"FEV1% predicted (post)	ront Save
(Manual Numeric)"	
Important* Click Save and	
then click OK .	



Click the area to the left of the red highlighted box titled: "-> CAT (3)"		
Right-click on the blue area and select Edit .		
	FEV1 ->FEV1%predicted(post) (3) CAT -> CAT (3) MMRC -> MMRC (3)	
CAT Step 1/3:	Component Editor [16, 779]	×
On the left panel, select:	Name Medication Version 1 -	Type Query Name cat_lob_resut
Query – Lab Result	Author Optimed Software Signature COMLabel Hidden When Viewing Form	Tag Name (cat_lab_result Reportable
On the right panel, Click Lab Test and select " COPD (E2P)" . Click Lab Result and select " CAT (Manual, Numeric)" .	Background Extendits Properties Lupou Style Horizontal Labol CAT Denvy Lab Resul Date LebComboBox Lab Test: COPD Lab Result CAT	Ouery Lab Result CoPD (27) Lab Result CAT (Manual, Numeric) Patient Lab (Mask Recent Compose Control on this test AND result Compose Control Control (Manual, Numeric) Lab Result from any lab test on the patient chart.
	00	Font Save
Important* Click Save and the	en proceed to CAT Step 2/3.	<u>Do not click OK yet.</u>
CAT Step 2/3:	- Component Editor [16, 779]	×
On the left panel, select:	Name Medication Version 112 Description	Type Clurry Name cat_lsb_result_date
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Click Lab Result and select		* The Most Recent CAT (Manual, Numeric) Lab Result Date from any lab test on the patient chart.
"CAT (Manual, Numeric)".		
		Font Save
Important* Click Save and the	n proceed to CAT Stop 2/2	Do not click OK vet
importante cilek suve und then proceed to CAT step 3/3. Do not cilek ok yet.		



FEV1 Step 3/3:	Component Editor [16, 779]	×
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Ouery – Lab Result Date	Author Optimed Software Signature COMLabel Hidden When Viewing Form	Tag Name cat_lab_result_combo
	Background Elements Properties	Lab Test COPD (E2P) Lab Resut CAT (Manual, Numeric)
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Click Lab Toot and soloot	Query Lab Result Date LabComboBox Lab Test: COPD Lab Result: CAT	
"COPD (E2P)".		
Click Lab Result and select		
"FEV1% predicted (post)		
(Manual, Numeric)".		
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then click OK .		
Click the area to the left of the	red highlighted box titled: "-	•> MMRC (3)"
	rea nightea box titlea.	
Right-click on the blue area ar	ia select lait .	
	FEV1 >>FEV/1%predicted(past) (3)	
	CAT -> CAT (3)	
	MMRC V -> MMRC (3)	
MMRC Step 1/3:	- Component Editor [16, 808]	×
On the left panel, select:	Name Medication Version 1	Type Query Name mmrc_lab_result
Query – Lab Result	Author Optimed Software	Tag Name mmrc_lab_resut
Query Lub Roould	Background Elements Properties	
On the right panel	Layout Style Horizontal V Label MMRC	Ourse Lab Based
Click Lab Test and select	Ouery Lab Result Query Lab Result Date LabComboBox Lab Test: COPD	Lab Result V
		Lab Result mmrc (Manual, Numeric) Patient Lab Most Recent
"COPD (E2P)".		Only use observations from this test AND result Enable Popup Edt
Click Lab Result and select		* Ine Most kecent mmrc (Manual, Numeric) Lab Hesuit from any lab test on the patient chart.
"MMRC (Manual, Numeric)".		
	00	Font Save
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Important* Click Save and the	n proceed to MMRC Step 2/3	3. Do not click OK vet.
	· · · · · · · · · · · · · · · · · · ·	



E2P COPD Tool

MMRC Step 2/3:	Component Editor [16, 808]	×
On the left panel, select:	Name Medication Version 1	Type Query V Name mmrc_lab_result_date
Ouery – Lab Result Date	Author Optimed Software	Tag Name mmrc_lab_result_date Reportable
	Background Elements Properties	
On the right panel	Layout Style Horizontal ~ Label MMRC	Query Lab Result Date 🗸
Click Lab Test and select	Query Lab Result Query Lab Result Date Lab ComboRox Lab Test: COPD Lab Result: mmrc	Lab Test COPD (E2P)
Click Lab Test and select		Patient Lab Most Recent
"COPD (E2P)".		Date Format dd-MMM-yyyy: 15-Jul-2024 Only use observations from this test AND result
		Enable Popup Edt
Click Lab Result and select		* The Most Recent mmrc (Manual, Numeric) Lab Result Date from any lab test on the patient chart.
"MMRC (Manual, Numeric)".		
	00	Fort Save
		OK
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	fi proceed to minice step s	S. <u>DO HOL CICK OK YEL</u>
MMRC Step 3/3:	Component Editor [16, 808]	×
On the left panel, select:	Description	Type Lab Dropdown mmrc_lab_result_combo
Query – Lab Result Date	Author Optimed Software Signature COMLabel Hidden When Viewing Form	Tag Name mmrc_lab_result_combo Reportable
	Background Elements Properties	Lab Test COPD (E2P) Lab Result mmrc (Manual, Numeric) V
On the right papel	Layout Style Horizontal ~ Label MMRC	Display Format Date: Value Unit ~
	Query Lab Result Query Lab Result Date Lab ComboBox Lab Test: COPD Lab Result: mmrc	
Click Lab Test and select		
"COPD (E2P)".		
Click Lab Result and select		
"MMRC (Manual, Numeric)".		
Important* Click Save and	00	Font Save
then eliek OK		ок
Click the area to the left of the	red highlighted box titled: "-	-> AECOPD (mild, moderate, or
severe)"		
Right-click on the blue area ar	nd select Edit	
IT.		
	latest recorded AECOPD	
	has there been another since ?	
-	r yes, enter severity	
l l	Exacerbation history -> AECOPD (mild, moderate	or severe,

Evidence2Practice Ontario Accessible. Actionable. Adaptable.

E2P COPD Tool





AECOPD Step 4/5:	Component sator (a), (b) A
On the left panel, select:	Description Acute exacerbations of COPO Name accopd_lab
TextField	Audior Optimed Software Tag Name (second_lab Leportable
	Background Elements Properties # of Columns 10 -
On the right panel	Layout Style Custom Label latest recorded AECOPD Row # of Columns Verifer Custom
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Click Lab Test and select	mage 100px whitespace png Label has there been another sl
"COPD (E2P)".	Query Lab Result Date 6 1 Label 7 7 2 Image 100px whitespace.png 1 1
	Label if yes, enter severity image to ong
Click Lab Result and select	leatined Image 100px whitespace.png Label Exacertation history
"AECOPD (mild, moderate or	LabComboBox Lab Test: COPD Lab Result
severe) (Manual Text)"	
Severey (Mandul, Text)	
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Important* Click Save and the	en proceed to AECOPD Step 5/5. <u>Do not click OK yet.</u>
AECOPD Step 5/5:	Version Version 1
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	Lab Test COPD (£2P) V Background Elements Properties Lab Result AECOPD (mid, moderate or severe) (Manual, Text) V
COPD Lab Result	Layout Style Custom Display Format Date: Value Unit V
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"COPD (E2P)".	Label if yes, enter severity mage tip png
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AECOPD (mild, moderate or	
severe) (Manual, Text)".	
	Fort Save
Important* Click Save and	OK
then click OK .	
.	
Click the save icon in the top	
right corner.	() / () / () () () () () () ()
Move to Deres 9: Assessments	
Move to Page 2: Assessments	
Navigate to the score box	record score*
under CAT Assessments	
Right-click on the textbox	
and select Edit.	
	1



E2P COPD Tool

On the right panel, Click Lab Test and select " COPD (E2P)" . Click Lab Result and select " CAT (Manual, Numeric)" .		Type Institute Name CAT Tag Name Catality Default Tool
Click Save and then click O	« .	Fort Save
Navigate to the score box	_	
under mMRC Assessments		
Pight-click on the textbox		record score*
and select Edit .	_	
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"COPD (F2P)"		Tag Name Call_score Reportable
Click Lab Result and select " mmrc (Manual, Numeric)	".	Beguites entry before form can be saved Venter Whole Numbers Lab Test COPO (22P) Lab Result
Click Save and then click O	¢.	Font Save
1. In the top left cornel	Tools Title e Pulmonary Disease Tool ~ @@@ Category	Standard Forms V Office electratic certific celence
click the orange	Standard Forms	Vidence2Practice E2P.COTO Competed E2P.COTO Competed E2P.COTO E2P.COTO Competed E2P.COTO Visit from Las completed
make it available; it	E2P - AD - Anxiety Disorders E2P - AD - Anxiety Disorders E2P - AD - Anxiety Disorders E2P - AD - GAD-7 Diagnor	The ESP COPD tool is based on the following guideline: CTL VaCx0, GOLD, OH OS Anothil is tatus: Last updated: Update status: 0 +
will then turn blue.	E2P - AD - PHQ-9 M E2P - COPD - CAT & mMR E2P - COPD - CAT & mMR E2P - COPD - Chronic Obstruc E2P - COPD - Chronic Obstruc E2P - COPD - Service 1 Nin	asis is unconfirmed, please indicate reason ctive (Objective C ctive (Objective UP
	COPD - Tips & Trick E2P - COPD - Vist Form v2 COPD - Vist Form v2 Pen	try vack (Inda void v (14) Since last valt, patient frees) Since last valt, patient frees Since last valt, patient frees v (14) Freesdaport v (14) Freesdaport Networkspation: (14) Freesdaport Networkspation: (14) Freesdaport Networkspation: (14) Freesdaport Networkspation: (14) Freesdaport F
2. Click on the top righ	Saved Components Appointment Components Custom Components	Advect seg function Prequent colds Chest pan Advect seg function Macconvery al examin Construction
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3. The Safe Form	Patient Physician Referring Physician Labs	iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii
window will open,	Mana; Vacc	BMR() BMR() BMR()
click "OK" to save.	L Cast or	Action Polidir is Ante* Last consider*



New Tool Version Process

Once a new tool version has been released, please follow these steps to update the tool in your EMR. You might have been notified that a new version of the E2P COPD tool is available via email.

From the Accuro EMR click on the Accuro target menu icon (insert icon).

Select **Tools** followed by **Form Editor** to launch the form editor window.

Within the Form Editor, click the top left **Tools** button and select the **Publish/Download** option.

Scheduler Patient Summary F3 Tools Patient Appointment View F4 Reports Ouick Patient Documents View F5 Ouick New Patient F6 Biling Ouick New Patient Users Search Family Link Help Address Book Address Book Att+F2 CDS Addr/New Patient Tasks CDS Addr/New Patient Tasks Configuration New Clinical Note Open Chart Sheet F9 Batch Chart Sheet Printing Form Edor Template Wizard + Update Tools Import Form from File Export Form to File Outshink / Download	File	Configure Providers	F2	^			
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The Form Publisher window will open.

To find the tool:

- 1. In **Red**, you enter "**E2P**" into the search bar.
- 2. Select the tools beginning with "E2P COPD" in the list.
- 3. Finally, click **Download** for each one to import them into your Accuro EMR.

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*Note that downloading this will replace the current version that is already in your EMR so you will not need to **recreate** the lab test or lab results you created initially but you will need to **map** the labs to the new version of the tool. To map the lab results, go to this section: <u>Mapping Form Elements</u>.

Feedback

Included in the tool is a link to provide feedback which allows users to submit their thoughts and communicate any issues they've encountered or any areas they wish to see added to the tool. This section allows you to submit feedback anonymously or allows you to add your email address and name if you wish to be contacted.

* The link can be found in the COPD Management Tool at the bottom of page 1:



Contact

If you have any questions or need support, please reach out to <u>EMRtools@ehealthce.ca</u> – thank you!

E2P brings together multi-disciplinary, cross-sector expertise under the joint leadership of the Centre for Effective Practice, eHealth Centre of Excellence, and North York General Hospital. Funding and strategic guidance for E2P is provided by Ontario Health in support of Ontario's Digital First for Health Strategy.

