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 EMRtools@ehealthce.ca to schedule a time.

Table of Contents
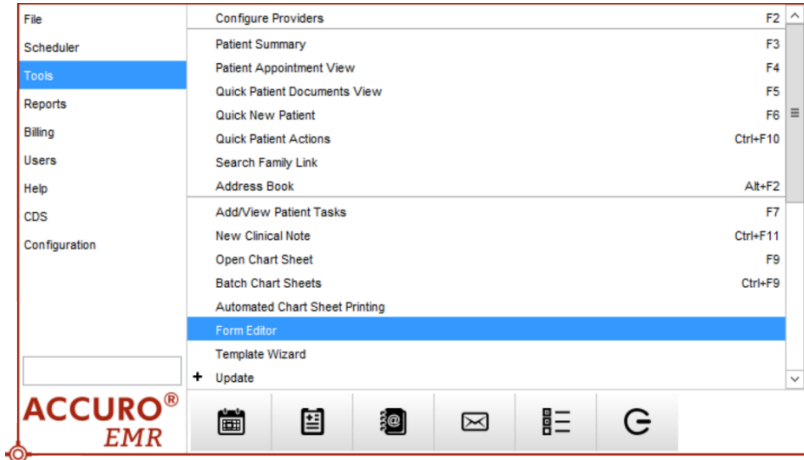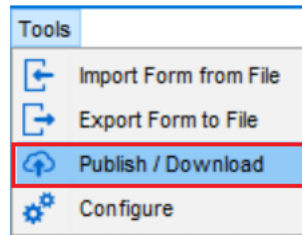
Downloading the E2P COPD Management Tool

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 select the **Publish/Download** option.

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**.

Configuring Form Elements

1.1   Creating the Generate Letter

1.1.1   E2P COPD Visit

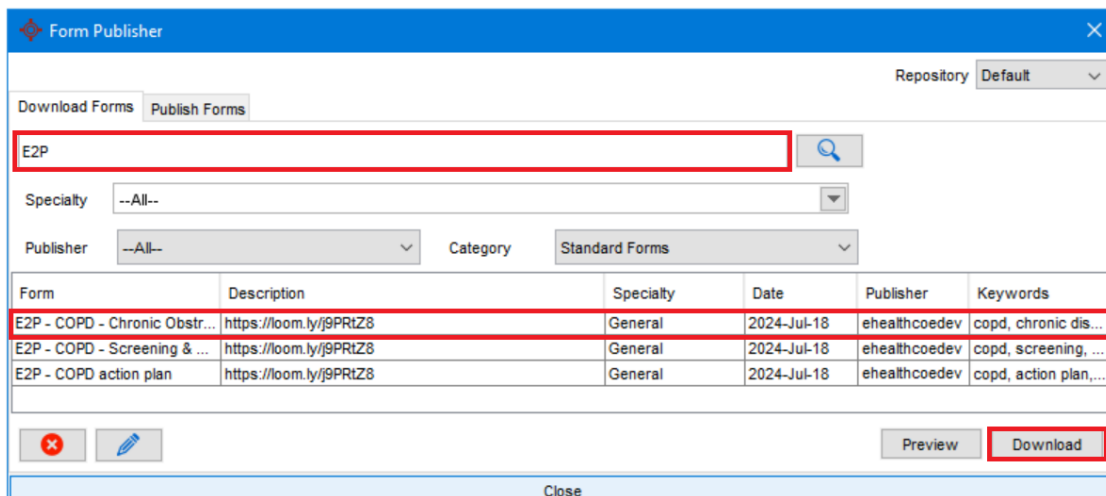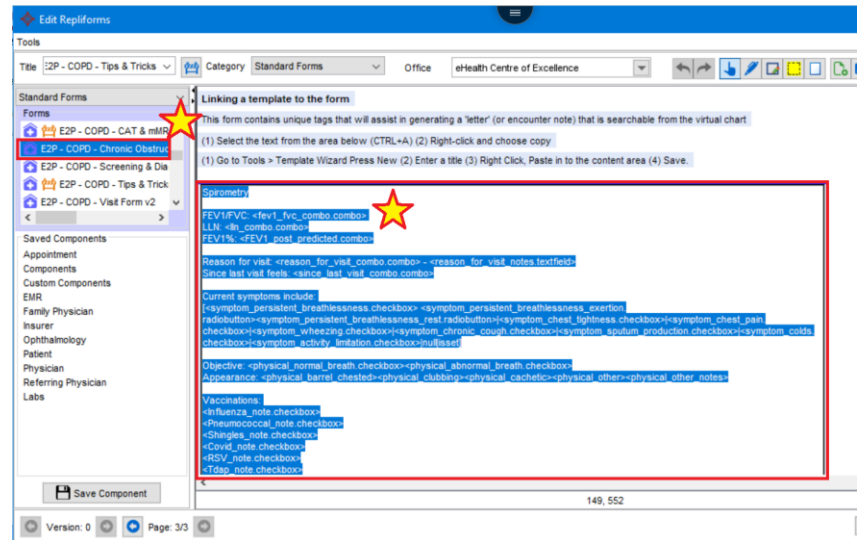|	
While in the form editor, Open the "**E2P – COPD – Chronic Obstructive Pulmonary Disease Tool**". Navigate to **page 3**. Scroll to the text box and using your keyboard, type **"CTRL + A"** to select all of the text. Then type **"CTRL + C"** to copy the text. **Close** the form editor.	
From the Accuro EMR click on the **Accuro target** menu icon. Select **Tools** followed by **Template Wizard** to launch the form editor window.	
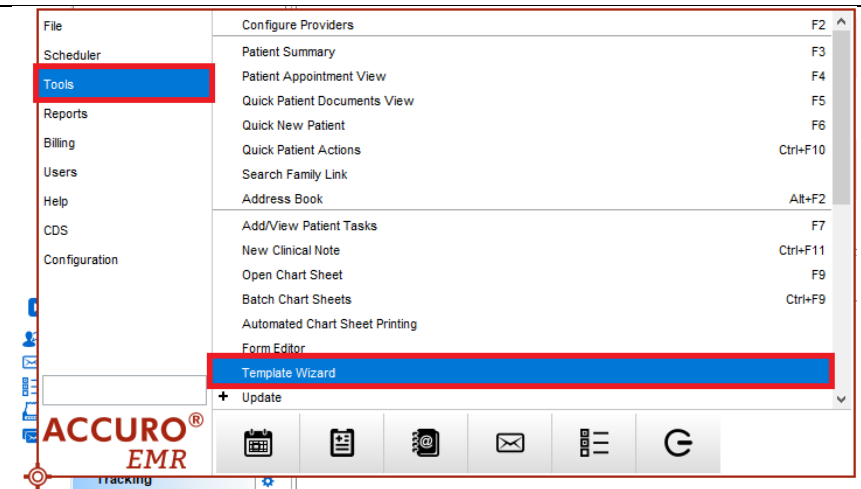
Click on the **green plus button** to add a new template.

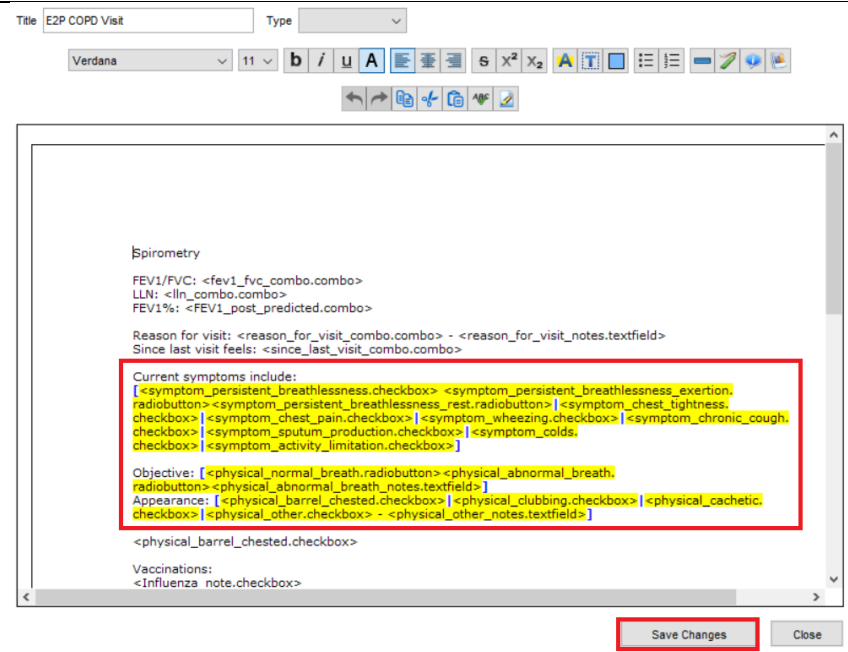Title it: **"E2P COPD Visit"**. Place your cursor in the letter area.

Using your keyboard, click **"CTRL + V"** to paste the copied text.
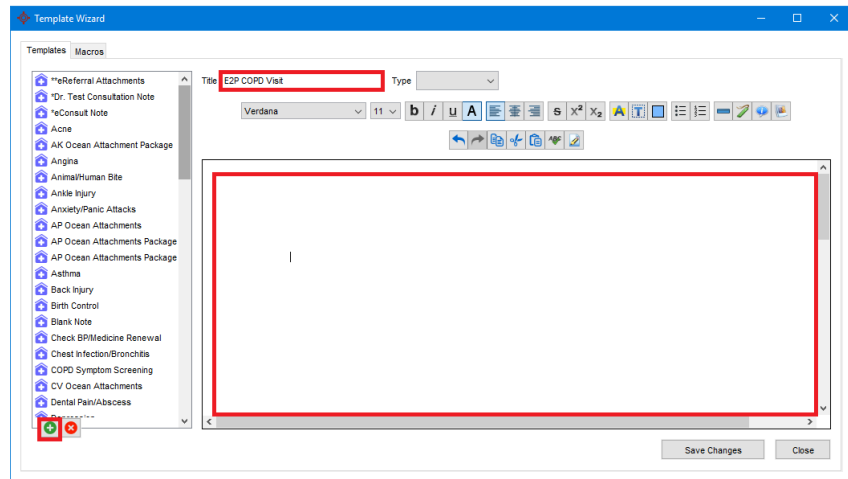
Searching for all the text within the blue lines "**[ ]**", then **click** on each text option to highlight them.

Ensure to scroll to the **bottom of the page** to highlight the remaining text.
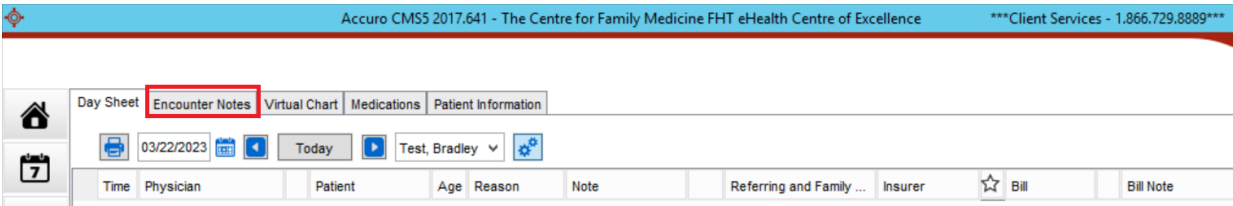
Then click **"Save Changes"**.

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**.
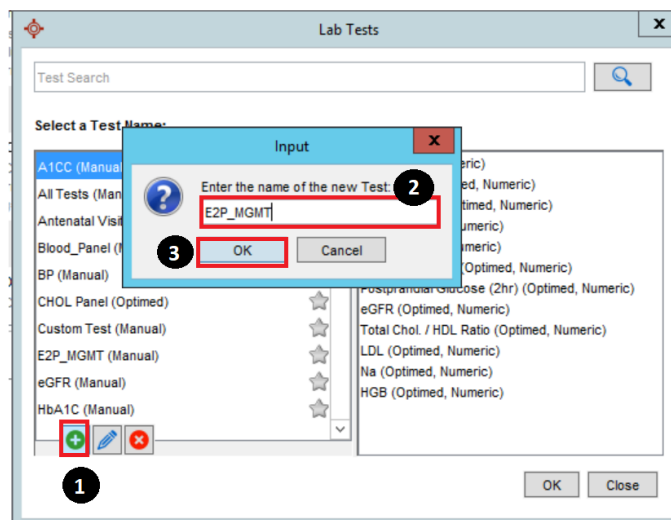

ii.   Select a test patient, which will reveal the notes, standard forms, and the lab section where the normal labs are listed.

iii.   To manage Lab Tests, click on the green plus button (*Lab Test in Accuro represents a Group of Test Results).
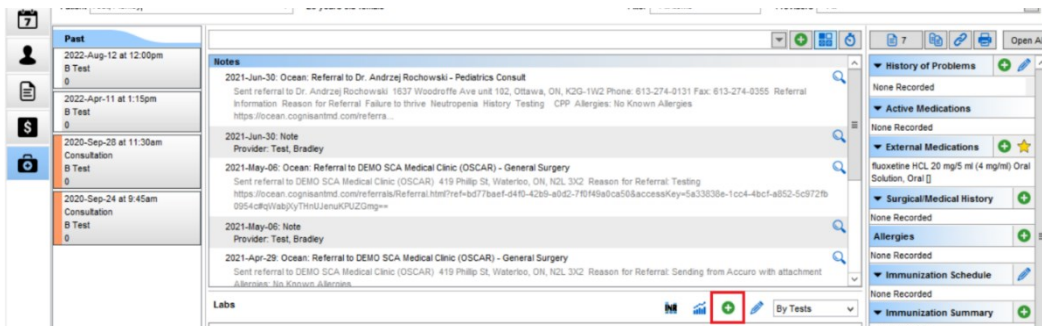
To create the first lab test, Click the **green plus button**.

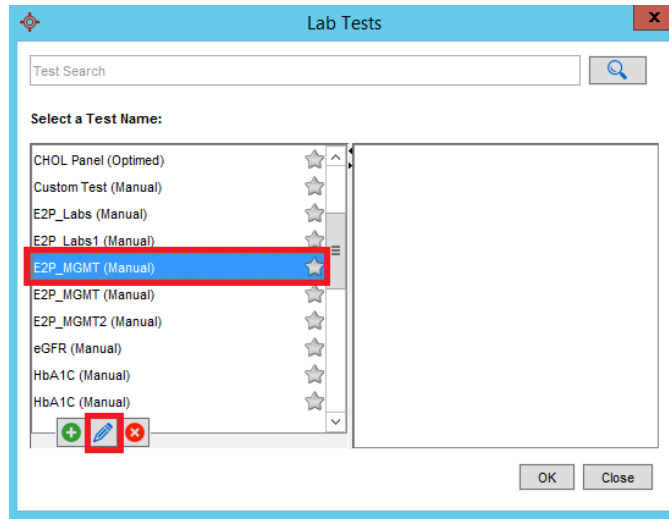Then Enter the name for the new Lab Test: **"E2P_MGMT"**.
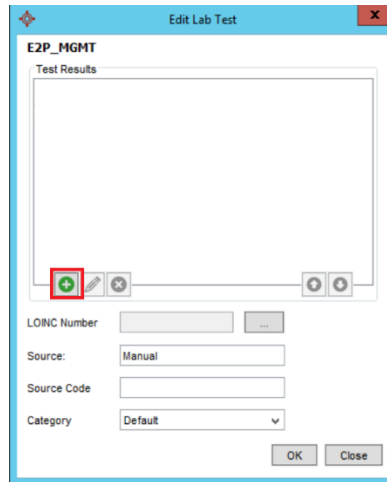
Then click **OK**.

If you have an existing E2P tool, please pick back up here:

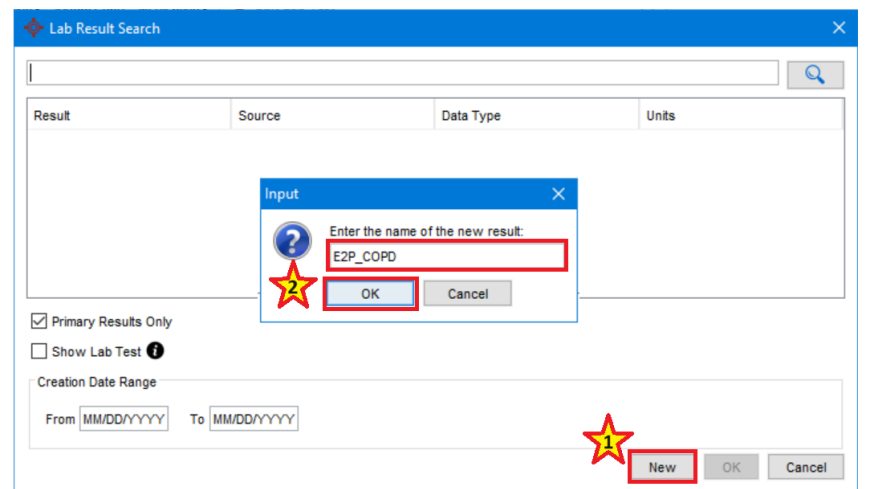Navigate to the **E2P_MGMT** lab test, then click on the **pencil icon** to edit.

This should open the Edit Lab Test Window.

Click the **green plus sign** to add the Lab Value.

1.2.1   E2P_COPD

From here click **New**.

Title it: "**E2P_COPD**".

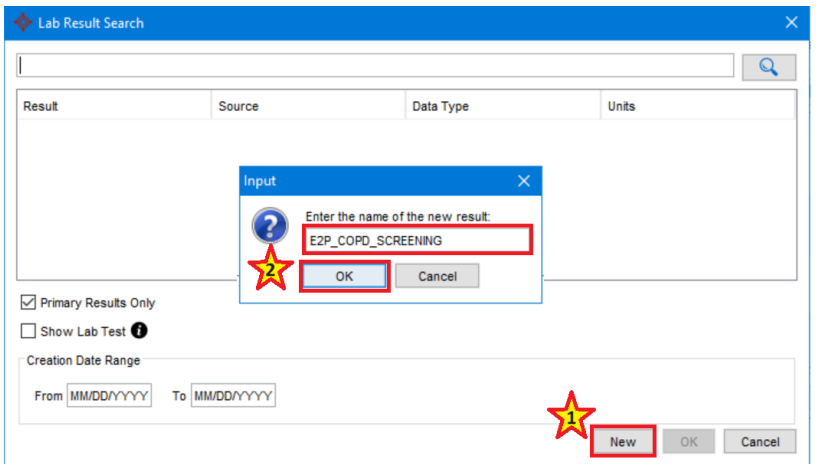|	
Edit the Result window will open. Enter the following: • Data Type: **Text** • Then click **"OK"**.	**Edit Result** E2P_COPD Source: Manual Source Code: Data Type: ● Numeric ○ Text Numeric Settings Units: Reference Ranges: Laboratory / Gender / Age / Reference Range There are a couple rules to keep 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. Linking... OK Cancel
Important Click on the E2P_COPD result line. Click **OK** to add it to the Lab Test.	**Lab Result Search** Result / Source / Data Type / Units E2P_COPD / Manual / Text / ☑ 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.	**Edit Lab Test** E2P_MGMT Test Results E2P_COPD (Manual, Text) LOINC Number ... Source: Manual Source Code: Category Default OK Close

1.2.2   E2P_COPD_SCREENING

From here click **New**. Title it: "**E2P_COPD_SCREENING**"	
Edit the Result window will open. Enter the following: • Data Type: **Text** Then click **"OK"**.	
Click on the E2P_COPD_SCREENING result line. Then click **OK** to add it to the Lab Test.	

Then click the **green plus sign** to add the next Lab Value.

1.2.3   dxStatusCOPD

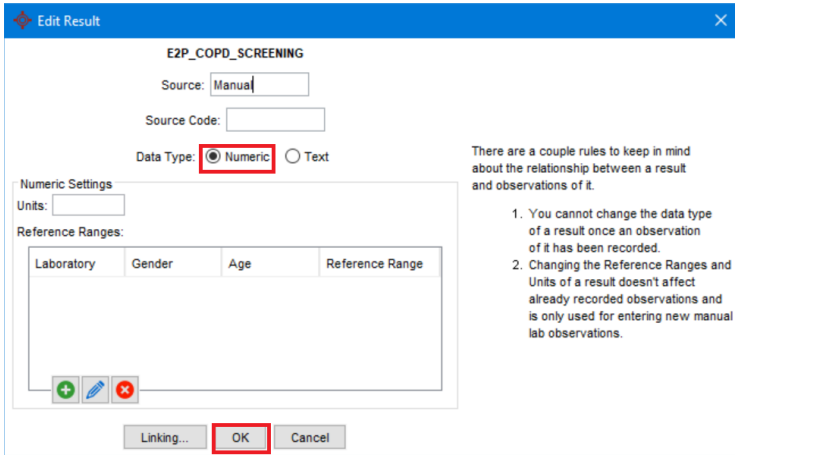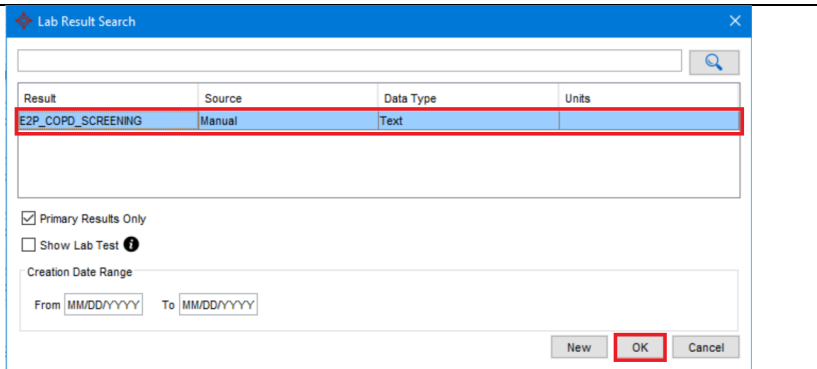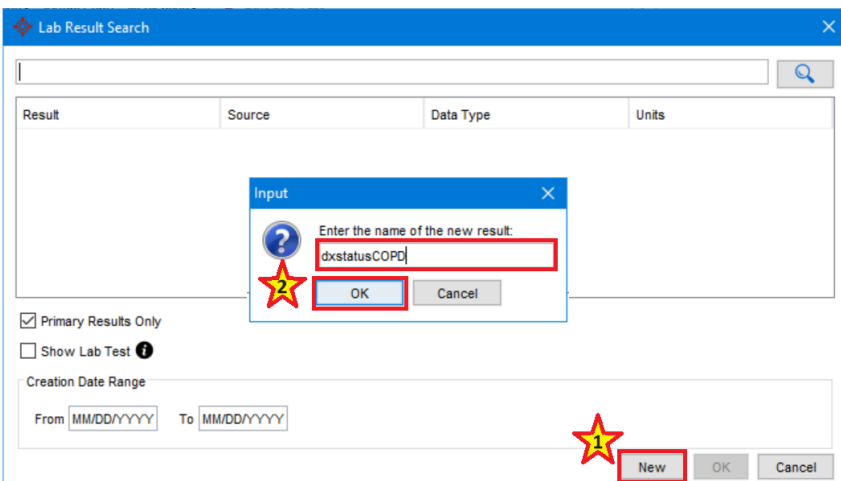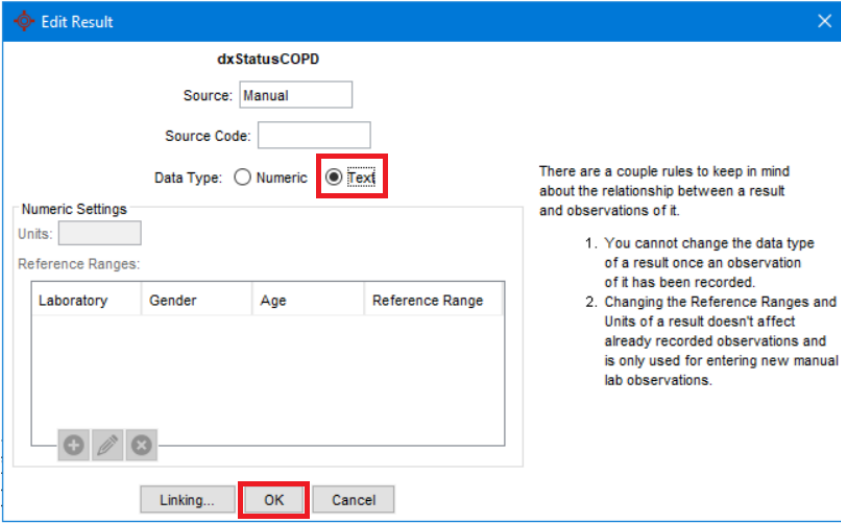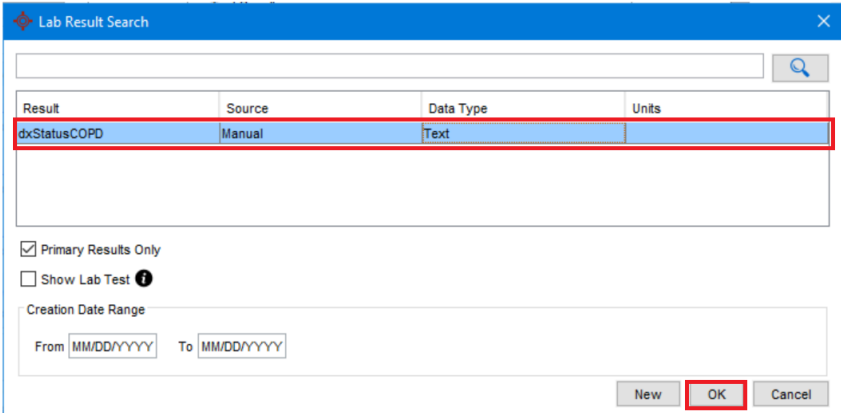|	
From here click **New**. Title it: "**dxStatusCOPD**"	Lab Result Search **Input** — Enter the name of the new result: `dxstatusCOPD` ⭐2 OK Cancel ☑ Primary Results Only ☐ Show Lab Test Creation Date Range From MM/DD/YYYY To MM/DD/YYYY ⭐1 New OK Cancel
Edit the Result window will open. Enter the following: • Data Type: **Text** Then click **"OK"**.	**Edit Result** **dxStatusCOPD** Source: Manual Source Code: ☐ Data Type: ○ Numeric ● Text Numeric Settings Units: ☐ Reference Ranges: Laboratory	Gender	Age	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. ⊕ ✎ ⊗ Linking... OK Cancel
Click on the dxStatusCOPD result line. Then click **OK** to add it to the Lab Test.	Lab Result Search Result	Source	Data Type	Units dxStatusCOPD	Manual	Text | ☑ Primary Results Only ☐ Show Lab Test Creation Date Range From MM/DD/YYYY To MM/DD/YYYY New OK Cancel

Then click **OK** to save your work.	

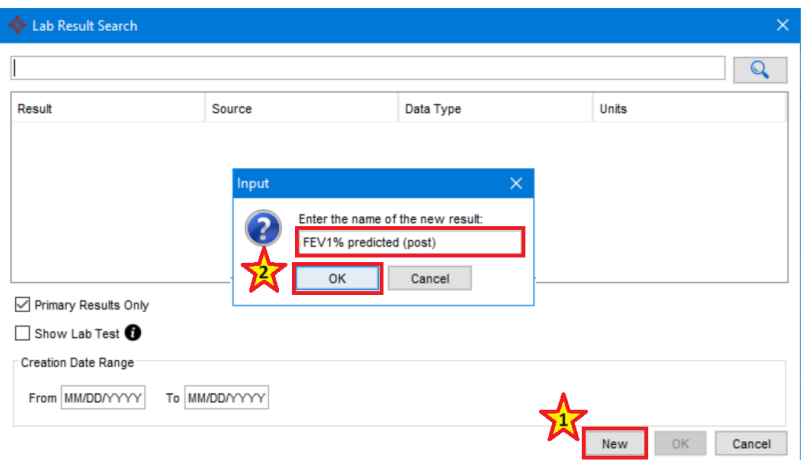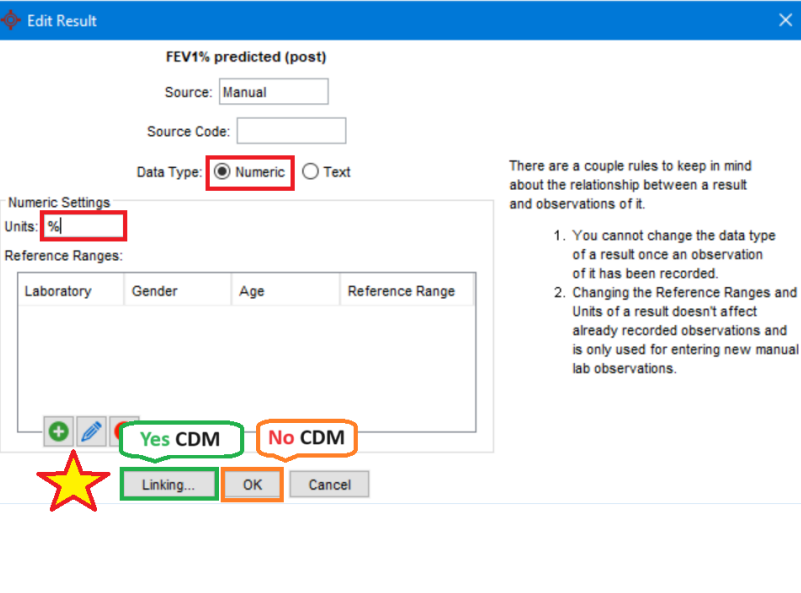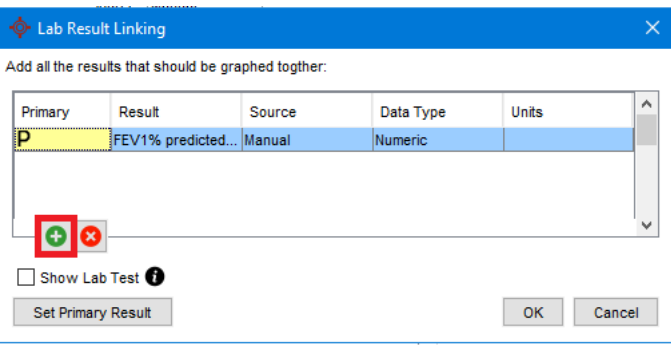## 1.3 Creating the Lab Test: COPD (E2P)

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:
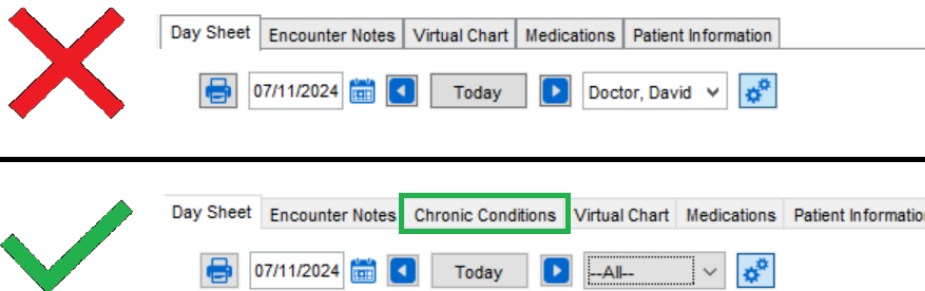
To create the second lab test, click the **green plus button**. Enter the name for the new Lab Test: **"COPD (E2P)"**. Then click **OK**. The Edit Lab Test Window should open. Click the **green plus sign** to add the Lab Value.	

1.3.1 FEV1% predicted (post)

From here click **New.** Title it: "**FEV1% predicted (post)**".	
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 B).** If CDM Worksheets **are enabled,** click **"Linking",** then pause here and proceed to **Step A).**	
Step A) The lab result linking window will open. 1. **Click** the **green plus sign**.	

2. **Enter "FEV1"** into the search bar and **click** the magnifying glass to search.
3. Select "**FEV1% of predicted (after puff)".**
   Ensure the source is "**Optimed**"
4. Click **"OK".**

5. Ensure the FEV1% predicted (post) result line (Manual) is set as the **Primary Result**.
6. Click **"OK".**

Step B)
Click on the FEV1% predicted (post) result line

Then click **OK** to add it to the Lab Test.
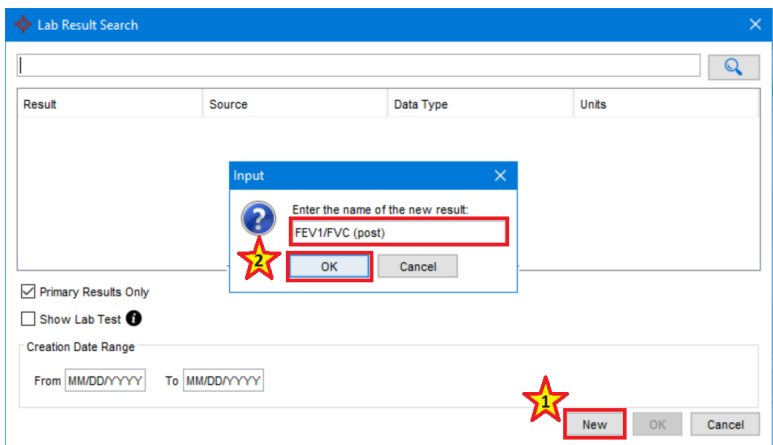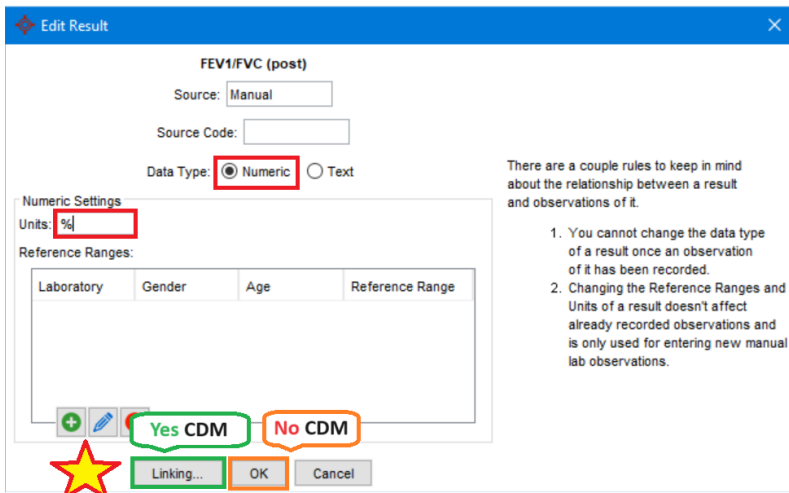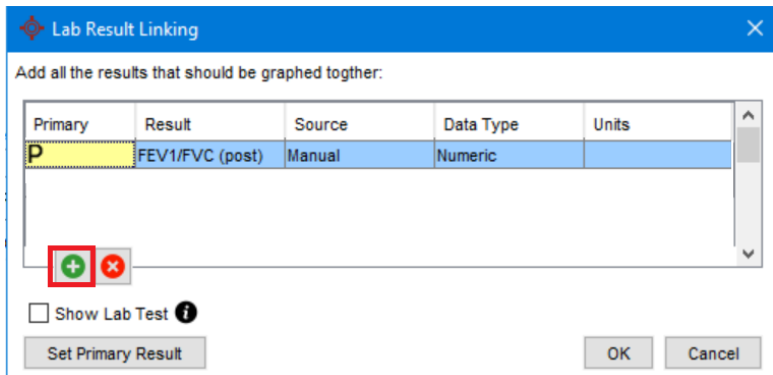
Then click the **green plus sign** to add the next Lab Value.

1.3.2   FEV1/FVC (post)

From here click **New.** Title it: "**FEV1/FVC (post)**".	
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)**.	
Step C) If CDM Worksheets are enabled follow these steps: 7. **Click** the **green plus sign**.	

8. **Enter "FEV1 / FVC"** into the search bar and **click** the magnifying glass to search.

9. Select "**FEV1/FVC ratio (after puff)"**. Ensure the source is **"Optimed"**.

10. Click **"OK".**

11. Ensure the FEV1/FVC (post) result line (Manual) is set as the **Primary Result**.

12. Click **"OK"**.

Step D)

Click on the **FEV1/FVC (post)** result line.

Then click **OK** to add it to the Lab Test.

Then click the **green plus sign** to add the next Lab Value.

1.3.3   LLN (FEV1/FVC)

From here click **New.** Title it: "**LLN (FEV1/FVC)**".	
Edit the Result window will open. Enter the following: • Data Type: **Text** Then click **"OK"**.	
Click on the **LLN(FEV1/FVC)** result line. Then click **OK** to add it to the Lab Test.	
Then click the **green plus sign** to add the next Lab Value.	

1.3.4   CAT

From here click **New.** Title it: "**CAT**".	
Edit the Result window will open. Enter the following: • Data Type: **Numeric** • Units: **/40** Then click **"OK"**.	
Click on the **CAT** result line. Then click **OK** to add it to the Lab Test.	
Then click the **green plus sign** to add the next Lab Value.	

1.3.5   mmrc

From here click **New**. Title it: "**mmrc**".	
Edit the Result window will open. Enter the following: • Data Type: **Numeric** • Units: **.** Then click **"OK"**.	
Click on the **mmrc** result line. Then click **OK** to add it to the Lab Test.	
Then click the **green plus sign** to add the next Lab Value.	
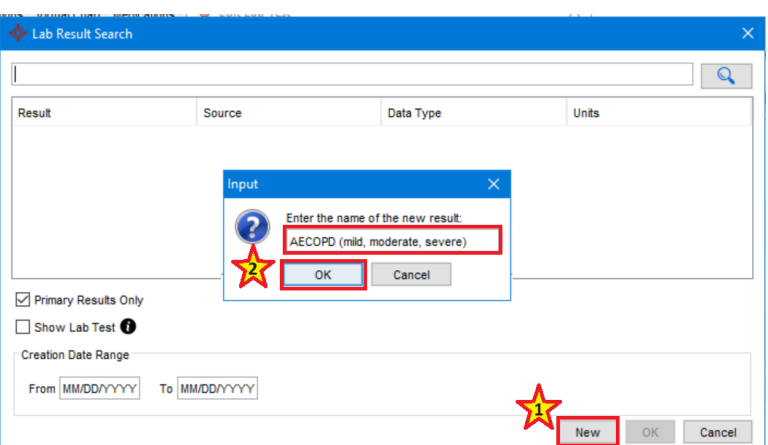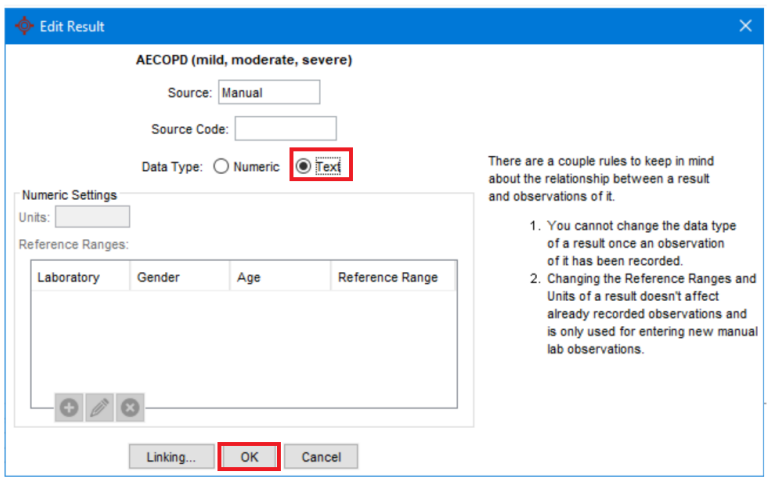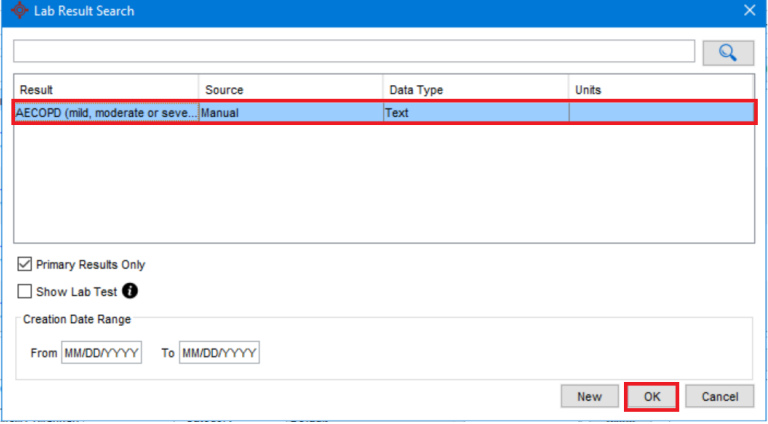
1.3.6 AECOPD (mild, moderate, severe)

From here click **New.** Title it: "**AECOPD (mild, moderate, severe)**".	
Edit the Result window will open. Enter the following: • Data Type: **Text** Then click **"OK"**.	
Click on the **AECOPD (mild, moderate, severe)** result line. Then click **OK** to add it to the Lab Test.	
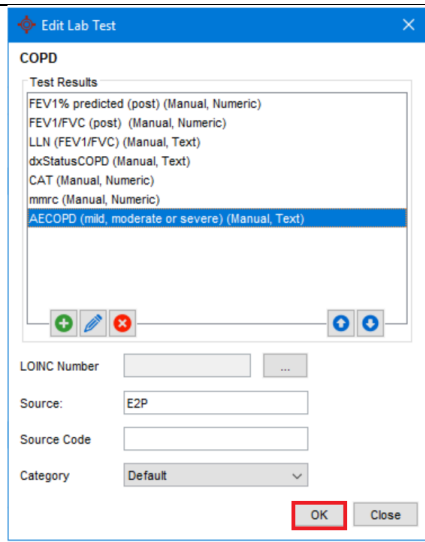
Then click **OK** to save your work.	
Then click the top **right X button OR Close** to close the next window.	
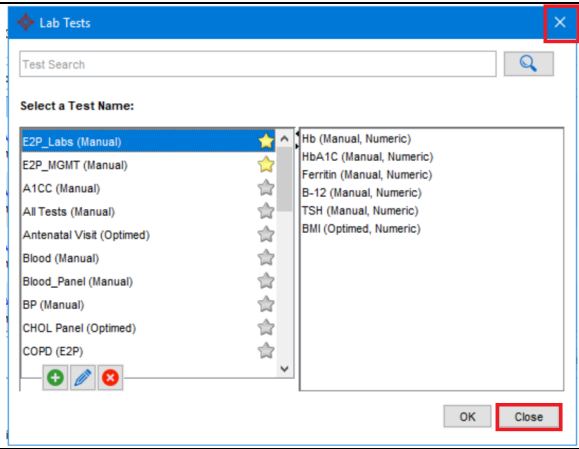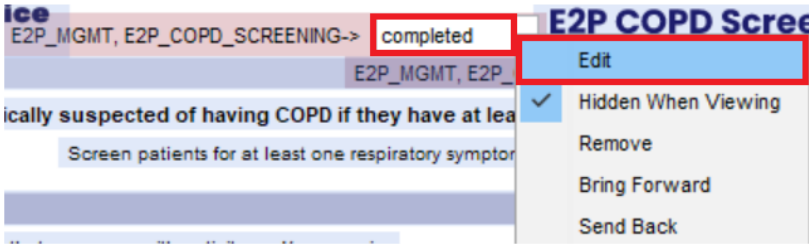
Mapping Form Elements

1.4   E2P – COPD – Screening & Diagnosis

Choose **Tools** then **Form Editor**.	

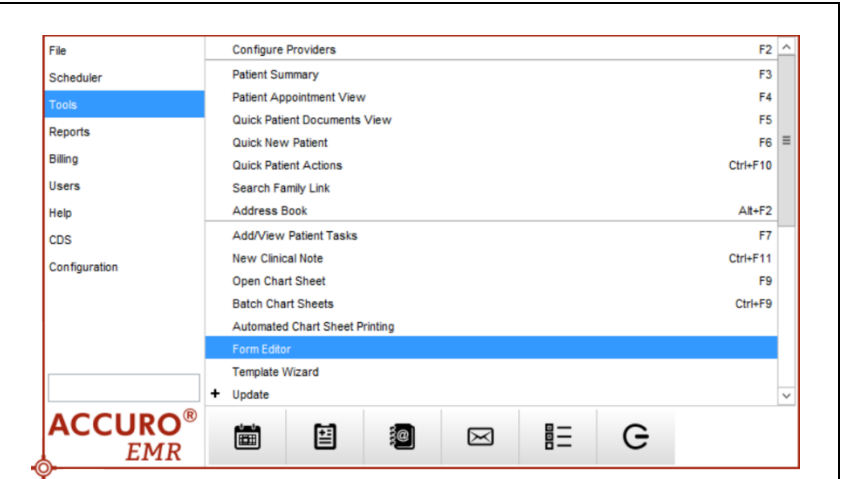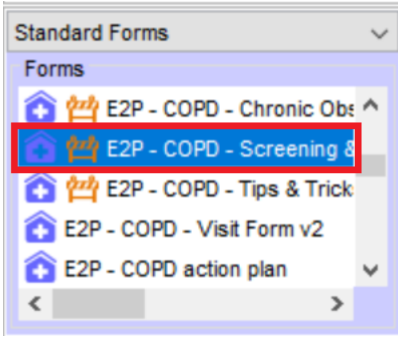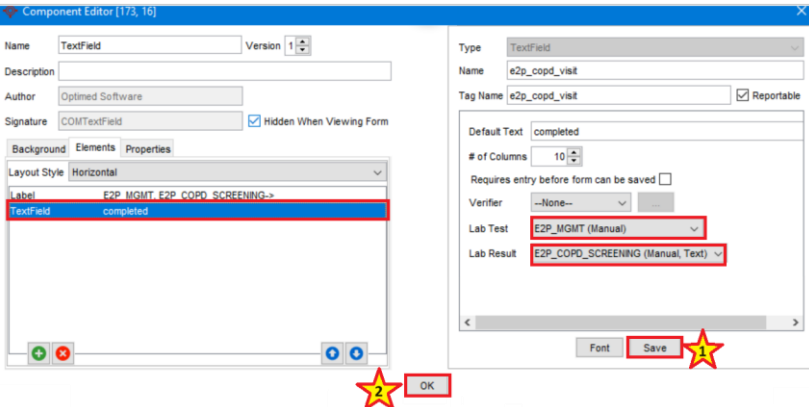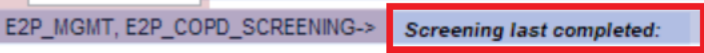|	
Look for the **E2P COPD Tool** in the **Standard Forms list**. **Click** on the tool name line to select the tool.	Standard Forms Forms E2P - COPD - Chronic Obs E2P - COPD - Screening & E2P - COPD - Tips & Trick E2P - COPD - Visit Form v2 E2P - COPD action plan
Once the tool appears, following the red highlighted area, click: **"completed"** Right-click and select **Edit**.	ice E2P_MGMT, E2P_COPD_SCREENING-> completed **E2P COPD Scree** Edit E2P_MGMT, E2P_ ✓ Hidden When Viewing ically suspected of having COPD if they have at lea Remove Screen patients for at least one respiratory sympton 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 [173, 16]
	Name: TextField Version 1 Type: TextField
	Description Name: e2p_copd_visit
	Author: Optimed Software Tag Name: e2p_copd_visit ☑ Reportable
	Signature: COMTextField ☑ Hidden When Viewing Form Default Text: completed
	Background Elements Properties # of Columns: 10
	Layout Style: Horizontal Requires entry before form can be saved ☐
	Label E2P_MGMT, E2P_COPD_SCREENING-> Verifier: --None--
	TextField completed Lab Test: E2P_MGMT (Manual)
	  Lab Result: E2P_COPD_SCREENING (Manual, Text)
	  Font Save
	  OK

Returning to the tool, Click: **"Screening last completed"**. Right-click and select **Edit**.	E2P_MGMT, 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)**".

Important* Click **Save** and then click **OK**.

Scroll to the bottom of the page.
Click the area to the left of the red highlighted box titled: **"dxStatusCOPD".**

Right-click on the blue area/textbox and select **Edit.**

dxStatusCOPD Step 1/3:
On the left panel, select:
Query – Lab Result

On the right panel,
Click Lab Test and select
"**E2P_MGMT**".

Click Lab Result and select
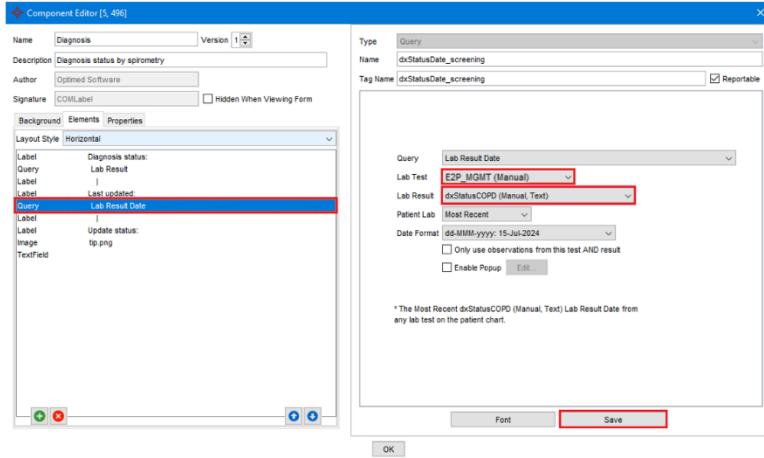"**dxStatusCOPD (Manual, Text)**".

Important* Click **Save** and then proceed to **dxStatusCOPD Step 2/3. Do not click OK yet.**

dxStatusCOPD Step 2/3:
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
"**dxStatusCOPD (Manual, Text)**".

Important* Click **Save** and then proceed to **dxStatusCOPD Step 3/3**. Do not click OK yet.
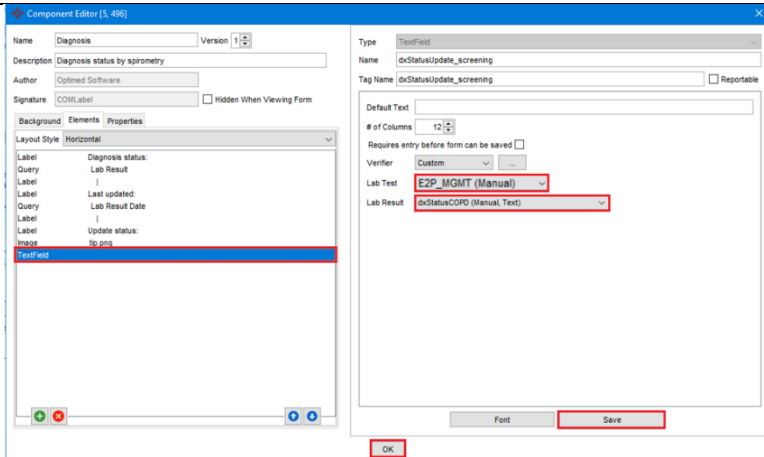
dxStatusCOPD Step 3/3:
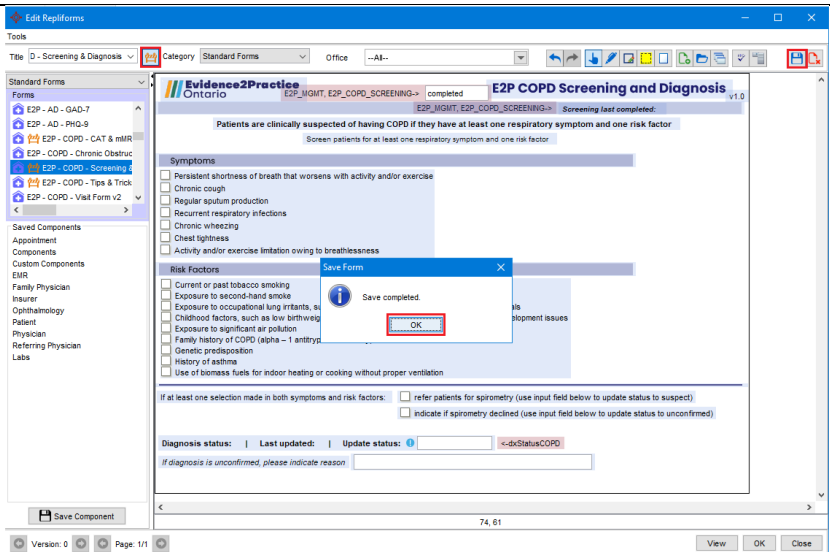On the left panel, select:
Query – Lab Result Date

On the right panel,
Click Lab Test and select
"**E2P_MGMT**".

Click Lab Result and select
"**dxStatusCOPD (Manual, Text)**".

**Important*** Click **Save** and then click **OK**.

1. In the top left corner, click the **orange construction sign** to make it available; it will then turn blue.

2. Click on the top right **file button** to save.

3. The Safe Form window will open, click **"OK"** to save.

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.	
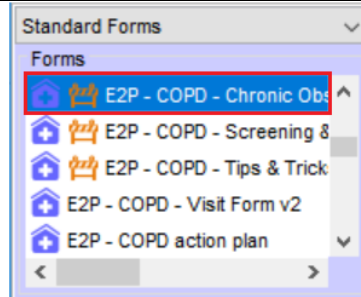
Once the tool appears, following the red highlighted area, click: **"completed"**
Right-click and select **Edit**.

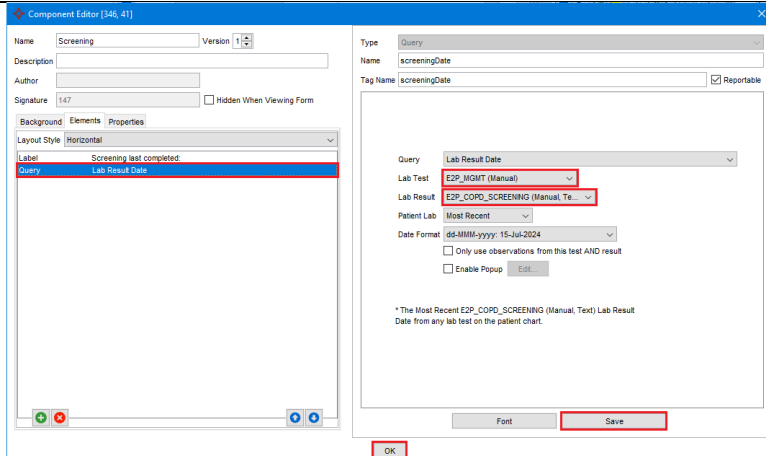|	
On the left panel, select: **TextField - completed** On the right panel, Click Lab Test and select "**E2P_MGMT**". Click Lab Result and select "**E2P_COPD (Manual, Text)**". **Important*** Click **Save** and then click **OK**.	
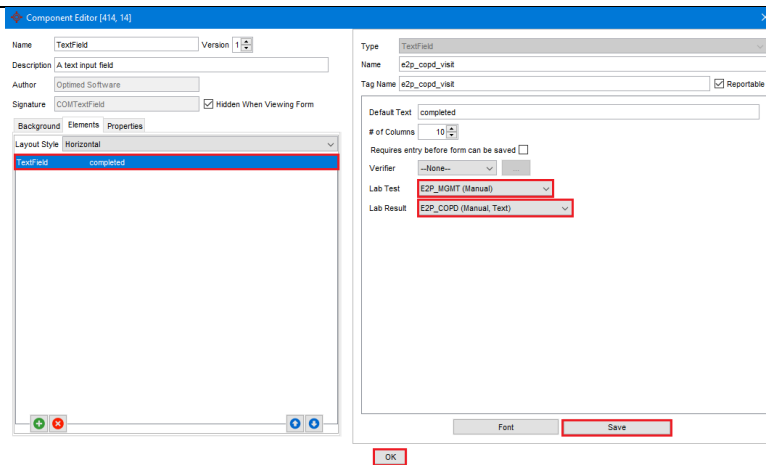
Following the red highlighted area, click: **"Screening last completed:"**
Right-click and select **Edit**.

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)**". **Important*** Click **Save** and then click **OK**.	

Following the red highlighted area, click: **"Visit form last completed:"**
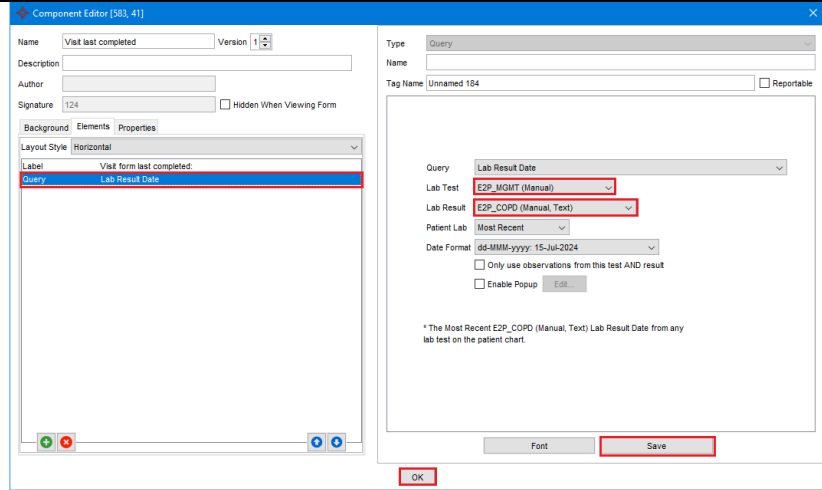Right-click and select **Edit**.

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 (Manual, Text)**".

Important* Click **Save** and
then click **OK**.

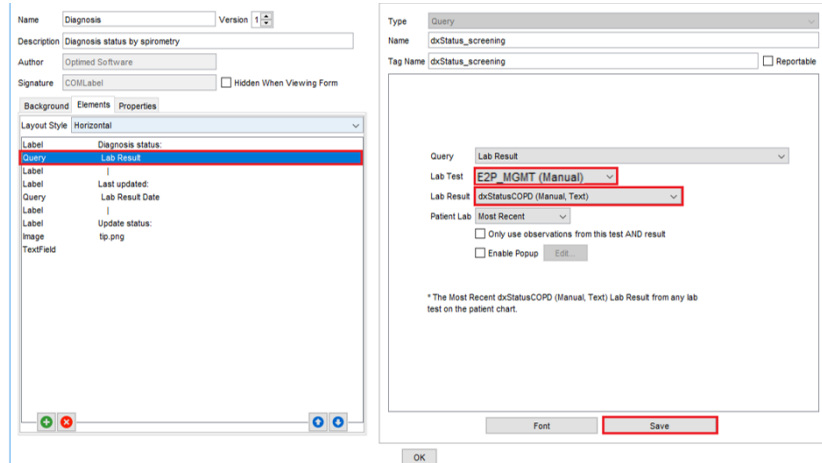Click the area to the left of the red highlighted box titled: **"dxStatusCOPD"**.

Right-click on the blue area/textbox and select **Edit**.

dxStatusCOPD Step 1/3:
On the left panel, select:
Query – Lab Result

On the right panel,
Click Lab Test and select
"**E2P_MGMT**".

Click Lab Result and select
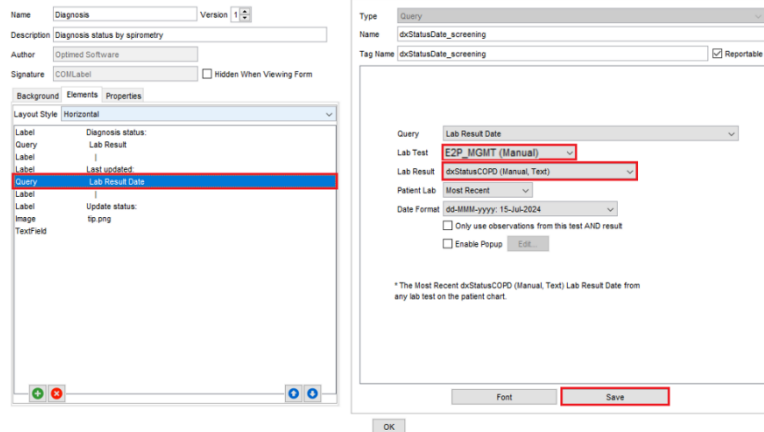"**dxStatusCOPD (Manual,
Text)**".

Important* Click **Save** and then proceed to **dxStatusCOPD Step 2/3. <u>Do not click OK yet.</u>**

dxStatusCOPD Step 2/3:
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
"**dxStatusCOPD (Manual, Text)"**.

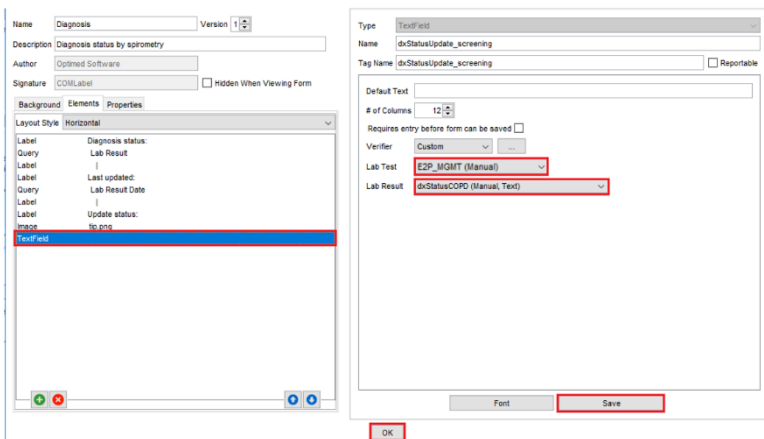**Important*** Click **Save** and then proceed to **dxStatusCOPD Step 3/3**. <u>Do not click OK yet.</u>

dxStatusCOPD Step 3/3:
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
"**dxStatusCOPD (Manual, Text)"**.

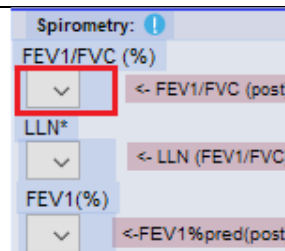**Important*** Click **Save** and then click **OK**.

On the right side of the tool:

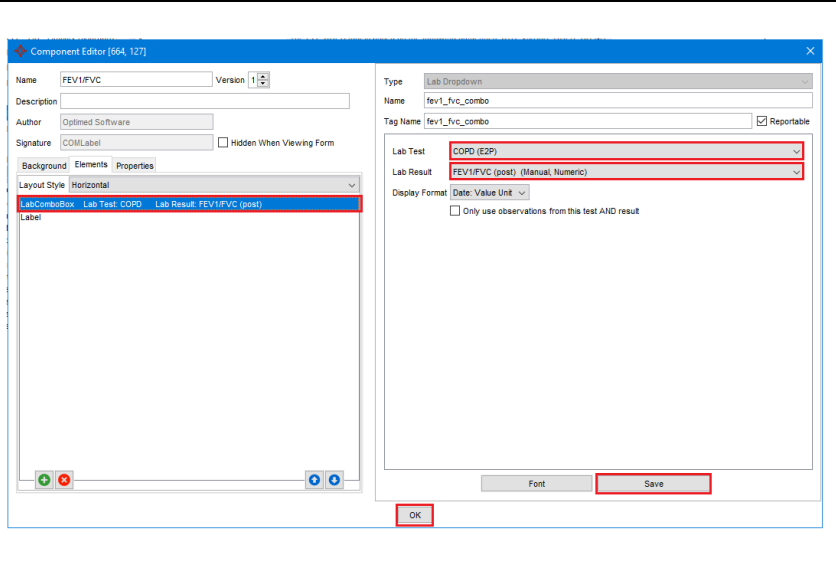Click the area to the left of the red highlighted box titled: **"<- FEV1/FVC (post)"**.

Right-click on the blue area and select **Edit**.

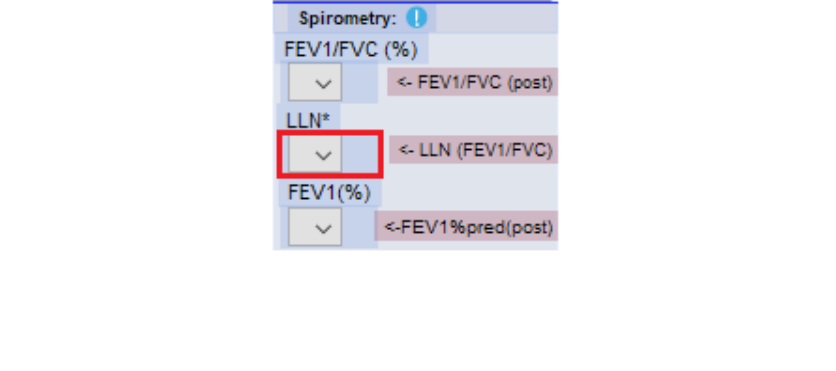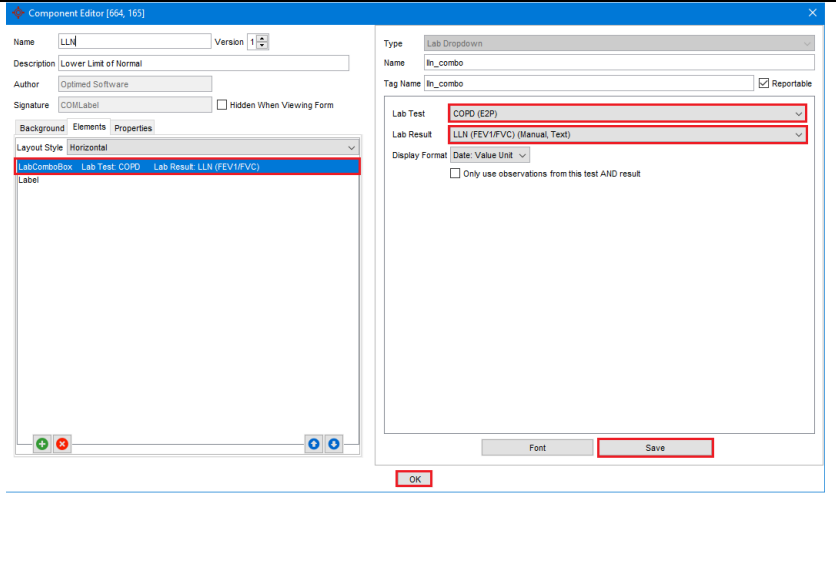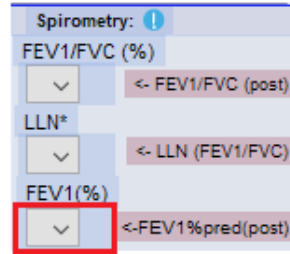|	
On the left panel, select: **LabComboBox - Lab test: COPD Lab Result: FEV1FVC (post)** On the right panel, Click Lab Test and select "**COPD (E2P)**". Click Lab Result and select "**FEV1/FVC (Manual, Numeric)**". **Important*** Click **Save** and then click **OK**.	
Click the area to the left of the red highlighted box titled: **"<- LLN FEV1/FVC"**. Right-click on the blue area and select **Edit**.	
On the left panel, select: **LabComboBox - Lab Test: COPD Lab Result: LLN (FEV1/FVC)** On the right panel, Click Lab Test and select "**COPD (E2P)**". Click Lab Result and select "**LLN FEV1/FVC (Manual, Text)**". **Important*** Click **Save** and then click **OK**.	

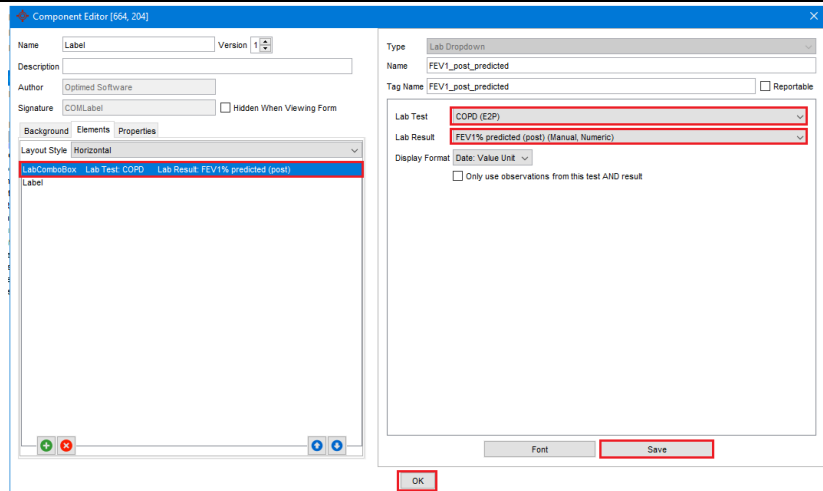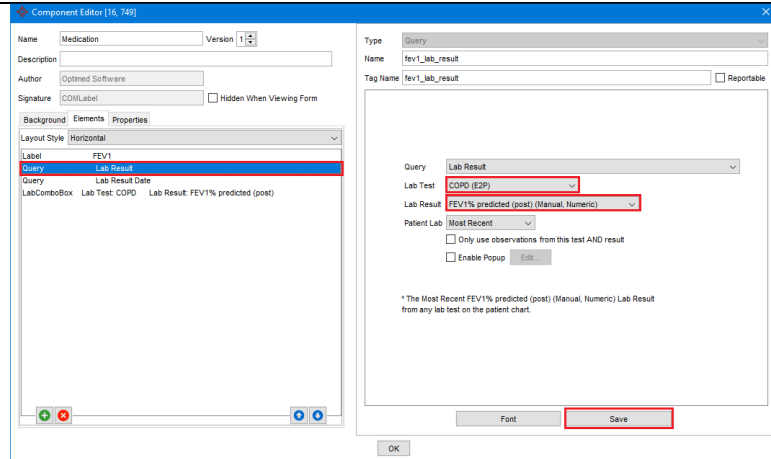|	
Click the area to the left of the red highlighted box titled: **"<-FEV1%pred(post)"**. Right-click on the blue area and select **Edit**.	
On the left panel, select: **LabComboBox - Lab Test: COPD Lab Result: FEV1% predicted (post)** On the right panel, Click Lab Test and select "**COPD (E2P)"**. Click Lab Result and select "**FEV1% predicted (Manual, Numeric)"**. **Important*** Click **Save** and then click **OK**.	
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**. 	
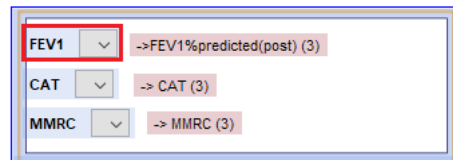
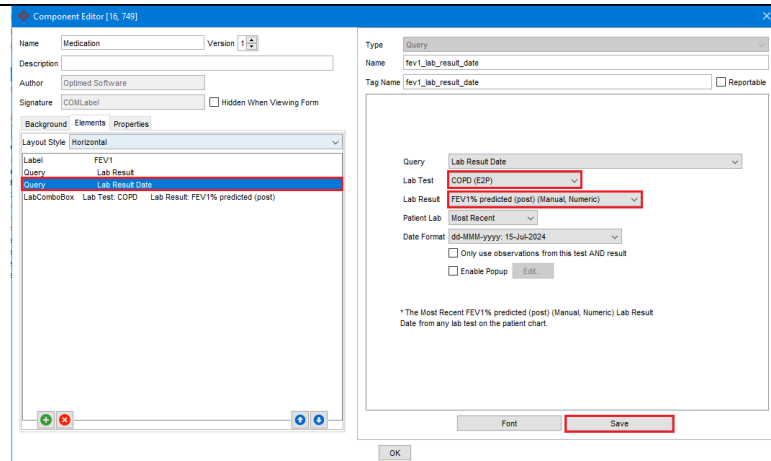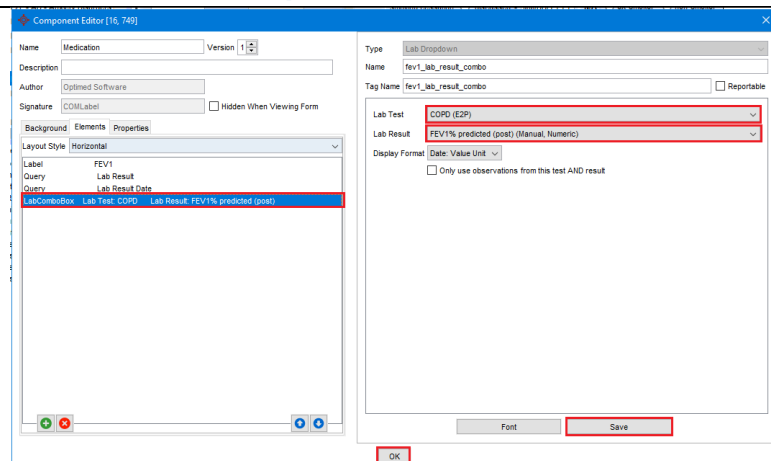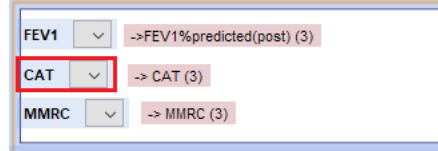|	
FEV1 Step 1/3: On the left panel, select: **Query – Lab Result** On the right panel, Click Lab Test and select "**COPD (E2P)"**. Click Lab Result and select "**FEV1% predicted (post) (Manual, Numeric)"**.	
Important* Click **Save** and then proceed to **FEV1 Step 2/3**. <u>Do not click OK yet.</u>	
FEV1 Step 2/3: On the left panel, select: **Query – Lab Result Date** On the right panel, Click Lab Test and select "**COPD (E2P)"**. Click Lab Result and select "**FEV1% predicted (post) (Manual, Numeric)"**.	
Important* Click **Save** and then proceed to **FEV1 Step 3/3**. <u>Do not click OK yet.</u>	
FEV1 Step 3/3: 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 (post) (Manual, Numeric)"**. **Important*** Click **Save** and then click **OK**.	

Click the area to the left of the red highlighted box titled: **"-> CAT (3)"**

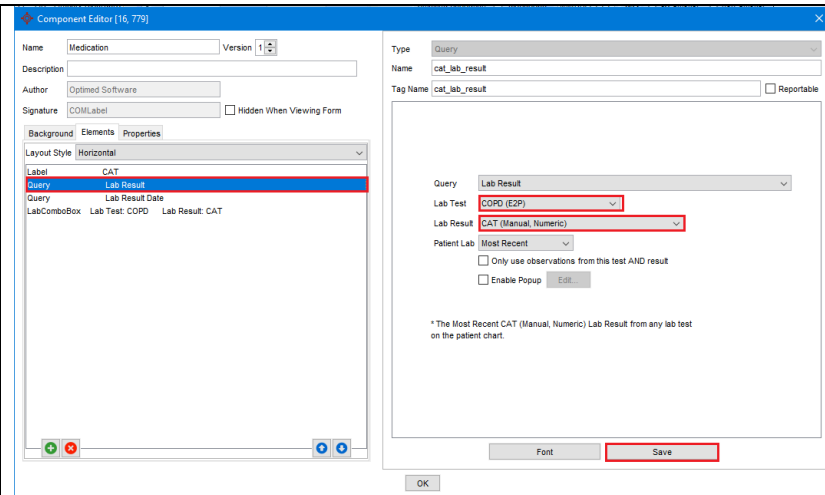Right-click on the blue area and select **Edit**.

CAT Step 1/3:

On the left panel, select:
Query – Lab Result

On the right panel,
Click Lab Test and select
"**COPD (E2P)"**.

Click Lab Result and select
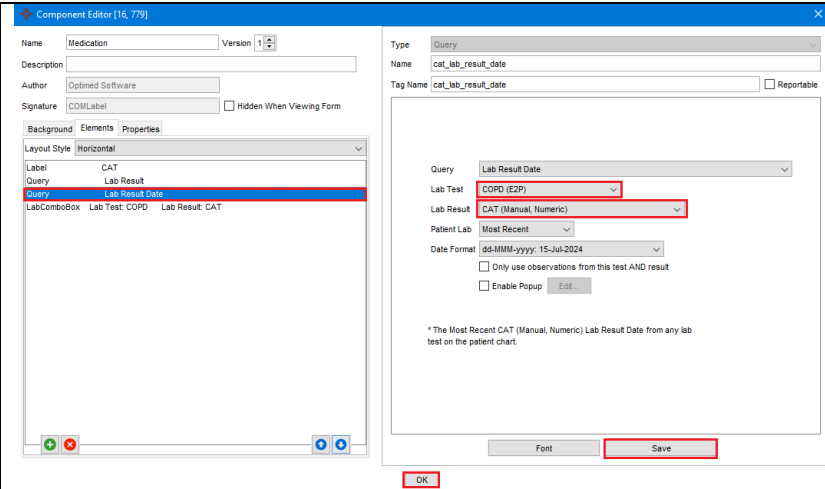"**CAT (Manual, Numeric)"**.

Important* Click **Save** and then proceed to **CAT Step 2/3**. Do not click OK yet.

CAT Step 2/3:

On the left panel, select:
Query – Lab Result Date

On the right panel,
Click Lab Test and select
"**COPD (E2P)"**.

Click Lab Result and select
"**CAT (Manual, Numeric)"**.

Important* Click **Save** and then proceed to **CAT Step 3/3**. **Do not click OK yet.**
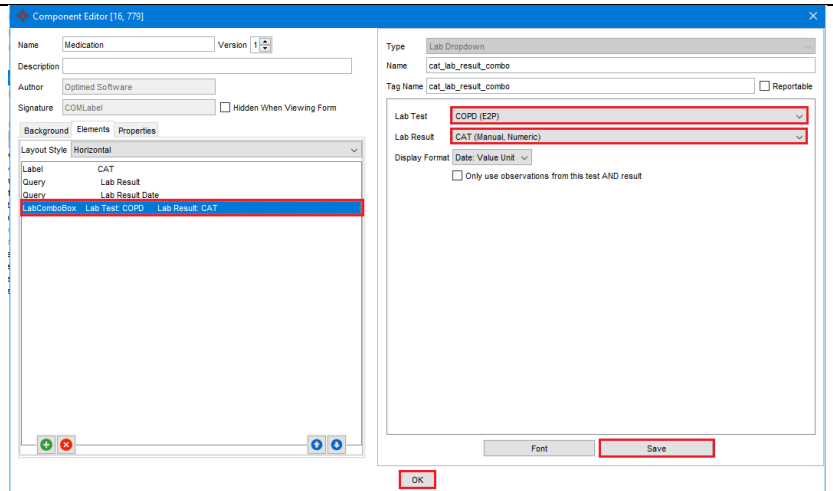
FEV1 Step 3/3:

On the left panel, select:
Query – Lab Result Date

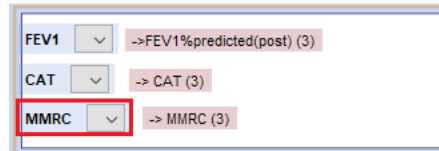On the right panel,
Click Lab Test and select
"**COPD (E2P)**".

Click Lab Result and select
"**FEV1% predicted (post) (Manual, Numeric)**".

Important* Click **Save** and then click **OK**.

Click the area to the left of the red highlighted box titled: "**-> MMRC (3)**"
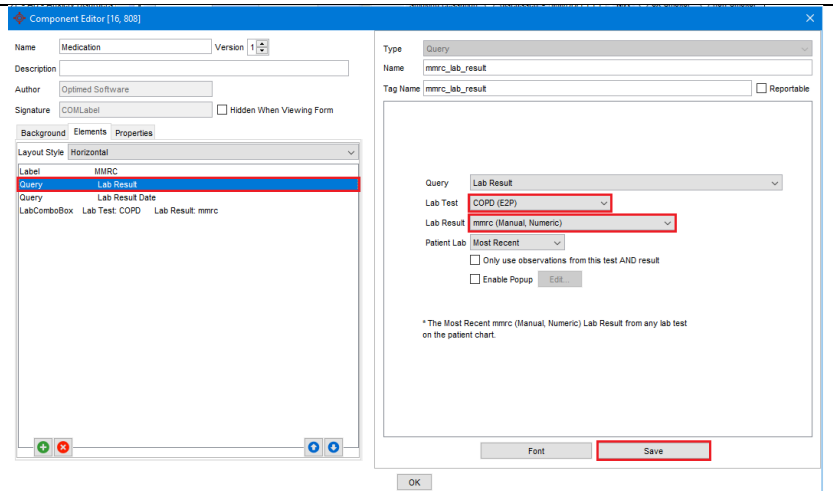
Right-click on the blue area and select **Edit**.

MMRC Step 1/3:

On the left panel, select:
Query – Lab Result

On the right panel,
Click Lab Test and select
"**COPD (E2P)**".

Click Lab Result and select
"**MMRC (Manual, Numeric)**".

Important* Click **Save** and then proceed to **MMRC Step 2/3**. **Do not click OK yet.**

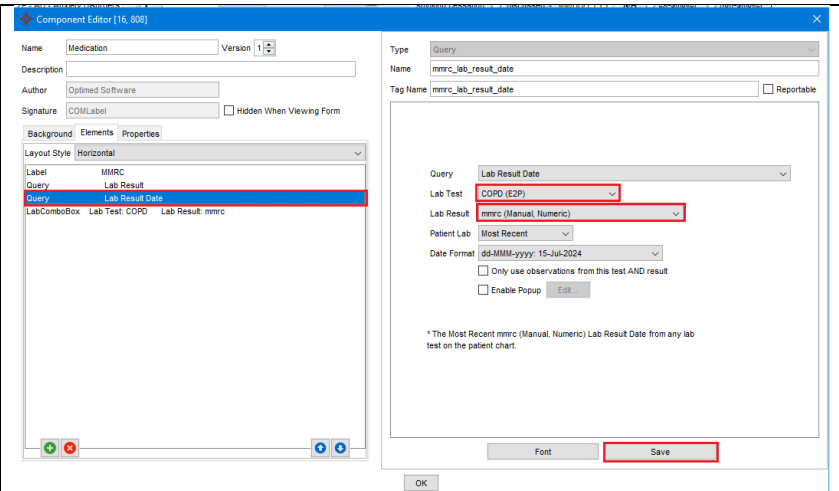|	
MMRC Step 2/3: On the left panel, select: **Query – Lab Result Date** On the right panel, Click Lab Test and select "**COPD (E2P)**". Click Lab Result and select "**MMRC (Manual, Numeric)**".	

Important* Click **Save** and then proceed to **MMRC Step 3/3**. <u>Do not click OK yet.</u>

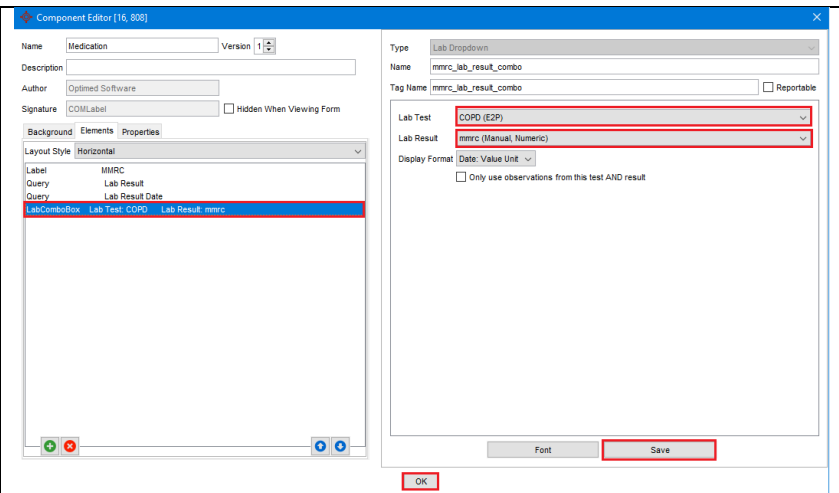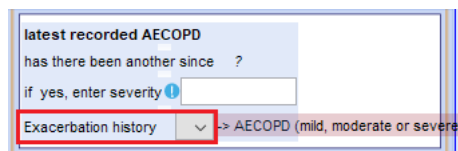|	
MMRC Step 3/3: On the left panel, select: **Query – Lab Result Date** On the right panel, Click Lab Test and select "**COPD (E2P)**". Click Lab Result and select "**MMRC (Manual, Numeric)**". **Important*** Click **Save** and then click **OK**.	

Click the area to the left of the red highlighted box titled: **"-> AECOPD (mild, moderate, or severe)"**

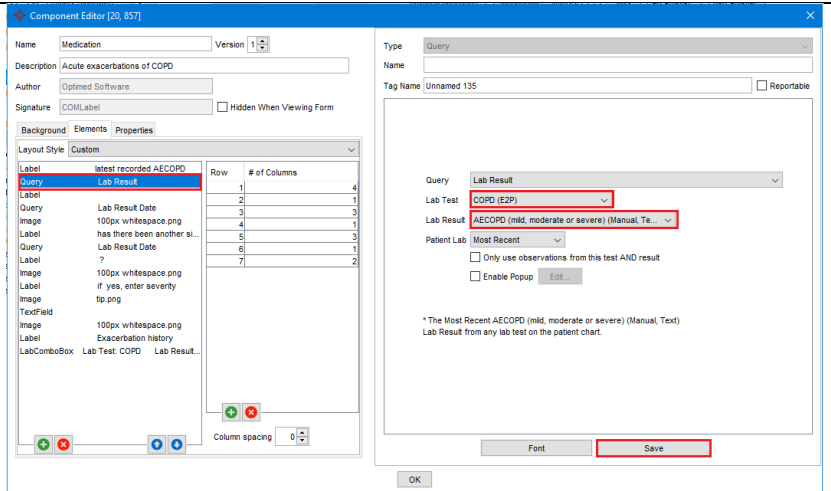Right-click on the blue area and select **Edit**.

AECOPD Step 1/5:

On the left panel, select:
Query – Lab Result

On the right panel,
Click Lab Test and select
"**COPD (E2P)**".

Click Lab Result and select
"**AECOPD (mild, moderate or severe) (Manual, Text)**".

Important* Click **Save** and then proceed to **AECOPD Step 2/5**. Do not click OK yet.

AECOPD Step 2/5:

On the left panel, select:
Query – Lab Result Date

On the right panel,
Click Lab Test and select
"**COPD (E2P)**".

Click Lab Result and select
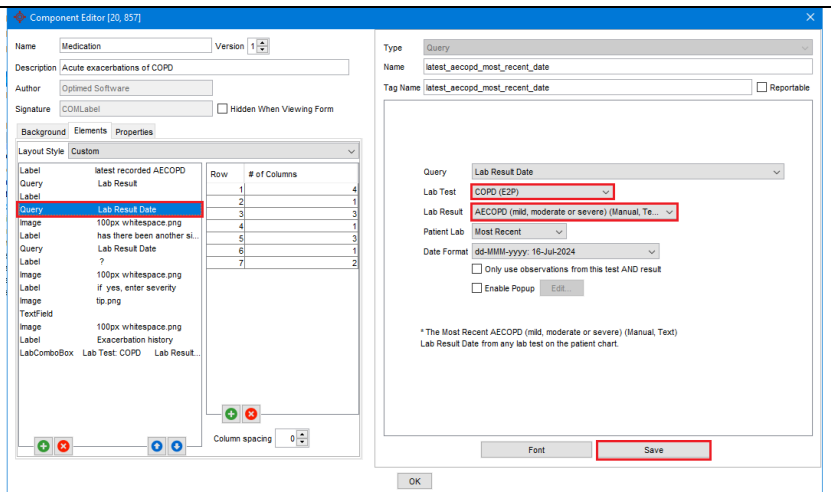"**AECOPD (mild, moderate or severe) (Manual, Text)**".

Important* Click **Save** and then proceed to **AECOPD Step 3/5**. Do not click OK yet.

AECOPD Step 3/5:

On the left panel, select:
Query – Lab Result Date

On the right panel,
Click Lab Test and select
"**COPD (E2P)**".

Click Lab Result and select
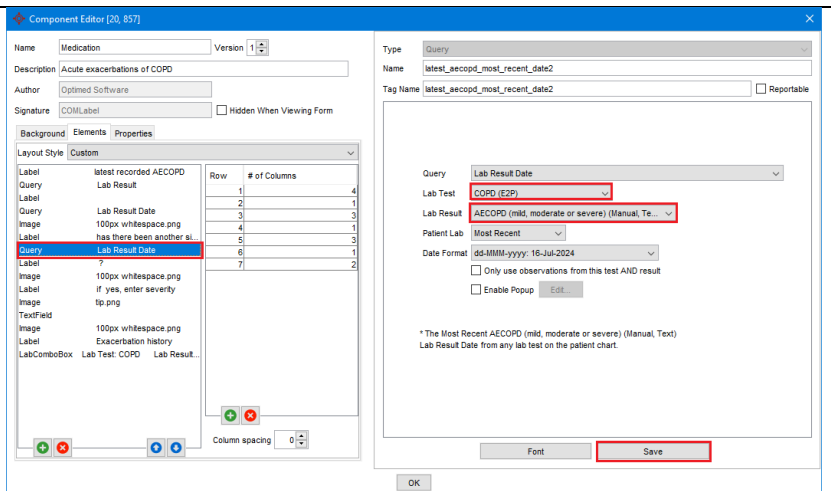"**AECOPD (mild, moderate or severe) (Manual, Text)**".

Important* Click **Save** and then proceed to **AECOPD Step 4/5**. **Do not click OK yet.**

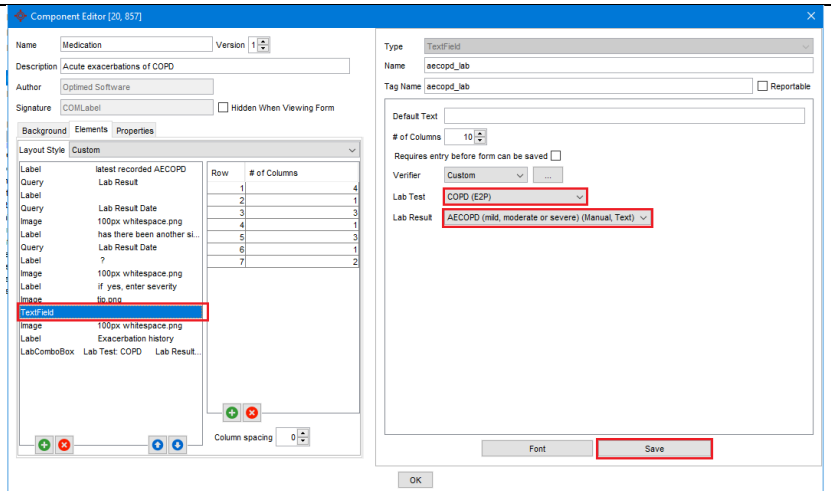|	
AECOPD Step 4/5: On the left panel, select: **TextField** On the right panel, Click Lab Test and select "**COPD (E2P)**". Click Lab Result and select "**AECOPD (mild, moderate or severe) (Manual, Text)**".	

Important* Click **Save** and then proceed to **AECOPD Step 5/5**. <u>Do not click OK yet.</u>
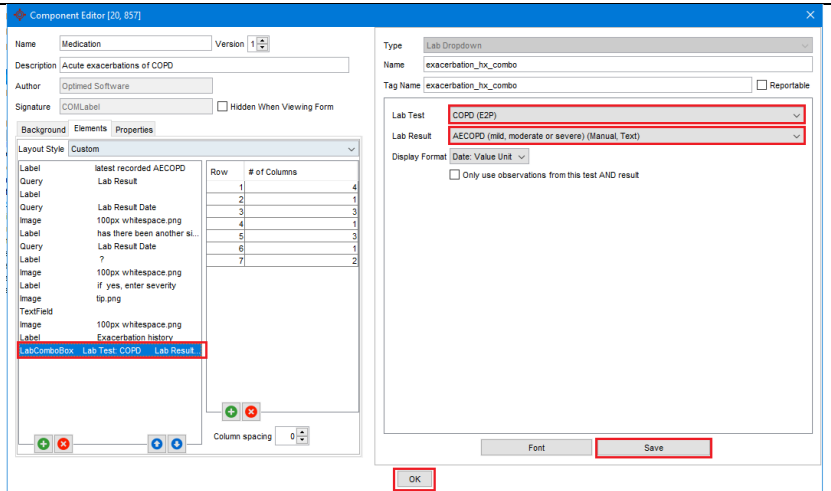
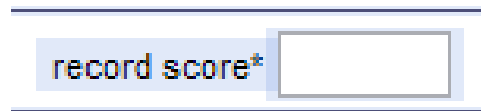|	
AECOPD Step 5/5: On the left panel, select: **LabComboBox – Lab Test: COPD Lab Result** On the right panel, Click Lab Test and select "**COPD (E2P)**". Click Lab Result and select "**AECOPD (mild, moderate or severe) (Manual, Text)**". **Important*** Click **Save** and then click **OK**.	

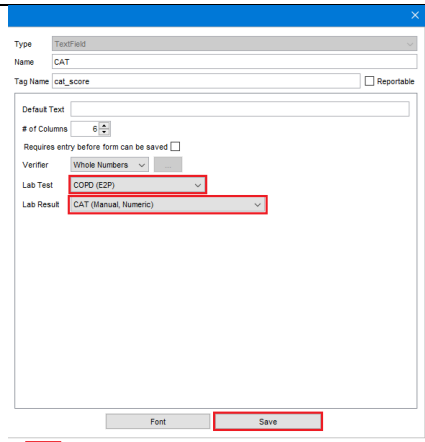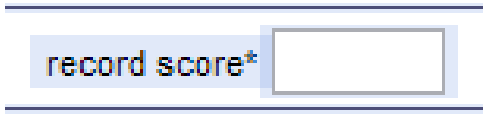|	
Click the save icon in the top right corner.	

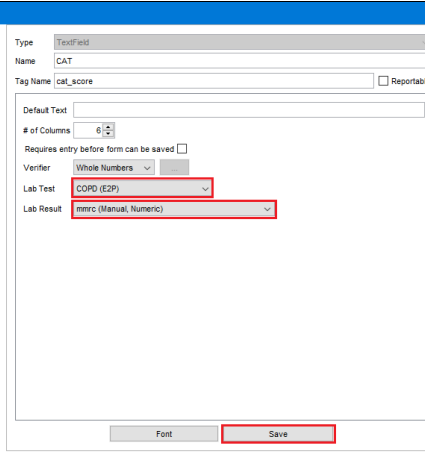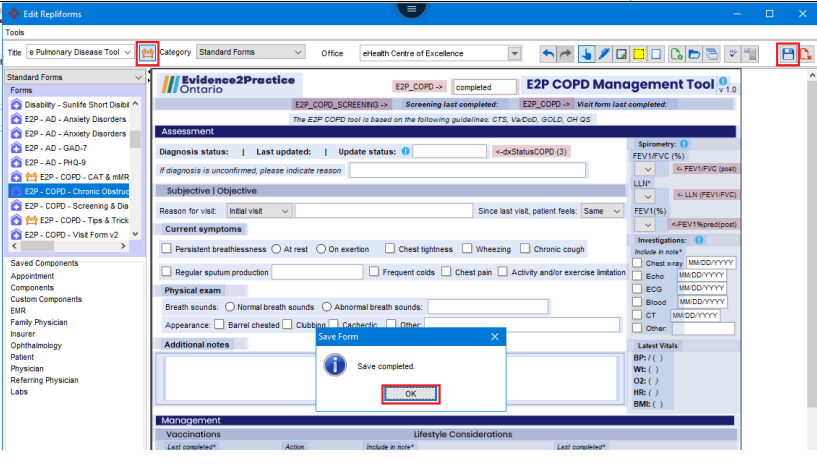|	
Move to Page 2: Assessments Navigate to the score box under CAT Assessments. Right-click on the textbox and select **Edit.**	 record score

|	
On the right panel, Click Lab Test and select "**COPD (E2P)**". Click Lab Result and select "**CAT (Manual, Numeric)**". Click **Save** and then click **OK**.	
Navigate to the score box under mMRC Assessments. Right-click on the textbox and select **Edit**.	
On the right panel, Click Lab Test and select "**COPD (E2P)**". Click Lab Result and select "**mmrc (Manual, Numeric)**". Click **Save** and then click **OK**.	
1. In the top left corner, click the **orange construction sign** to make it available; it will then turn blue. 2. Click on the top right **file button** to save. 3. The Safe Form window will open, click **"OK"** to save.	

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.
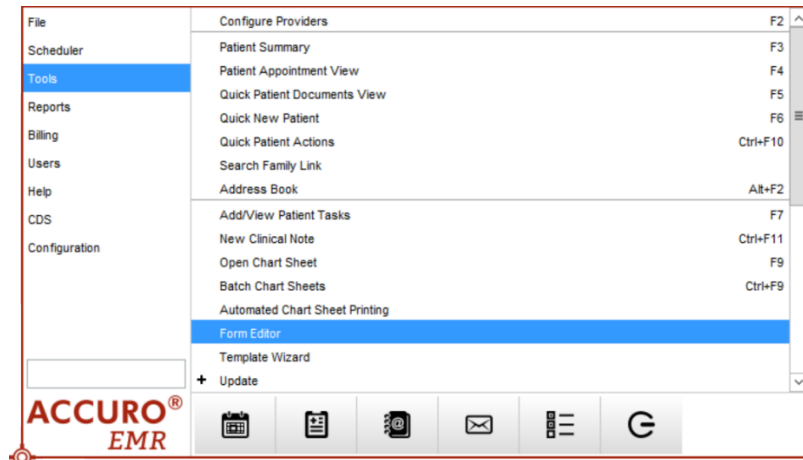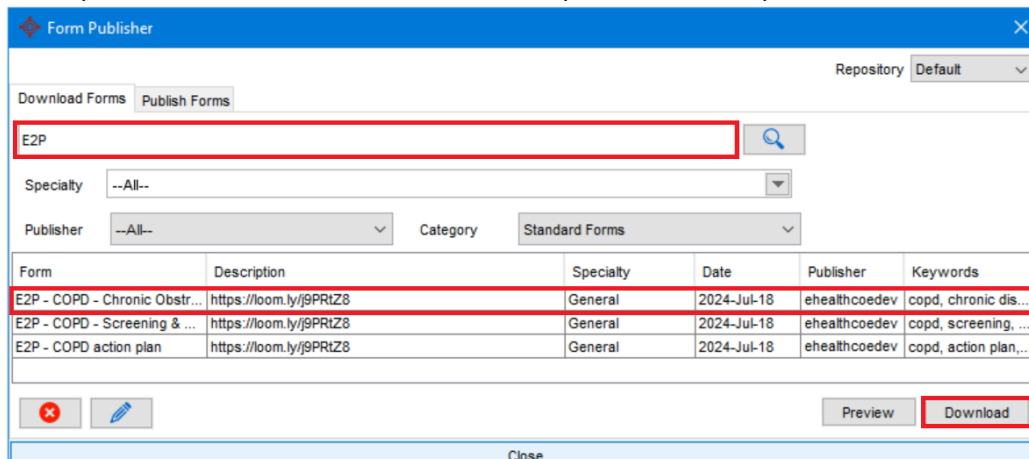
Within the Form Editor, click the top left **Tools** button and select the **Publish/Download** option.
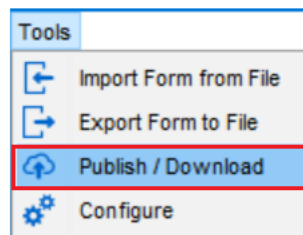
The Form Publisher window will open.
To find the tool:
1. In **Red**, you enter "**E2P**" into the search bar.
2. Select the tools beginning with "**E2P – COPD**" in the list.
3. Finally, click **Download** for each one to import them into your Accuro EMR.

*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: Mapping Form Elements.

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:

please **click here** to provide feedback for this tool

Contact

If you have any questions or need support, please reach out to EMRtools@ehealthce.ca – 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.