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

If you have any questions, please reach out to EMRtools@ehealthce.ca and we will be happy to help!

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Evidence2Practice – COPD Management Tool v. 1.0.0 - User Guide

Introduction

EMR tools from the Evidence2Practice Ontario (E2P) program are comprised of condition-specific modules (scalable to multiple conditions) based on the core clinical functions of quality standards. They were developed to make it easier for clinicians to access and apply best practice information and quality standards at the point of care.

This guide provides a walk-through of the tool with examples, highlighting the most important functionalities. The E2P COPD Management tool uses a modular approach to assist primary care clinicians with capturing critical information during an encounter. The tool is divided into sections: Patient Dashboard, Assessment, Medication, Management, and Patient Care Plan and Resources.

Purpose of the Tool

This tool aims to streamline the assessment, monitoring, and treatment of COPD, enabling healthcare providers to deliver personalized and effective care.

By utilizing this COPD Tool, primary care clinicians can improve the quality of care, enhance patient outcomes, and foster a collaborative approach to managing this chronic condition. We encourage you to explore the features and utilize them in your practice to support your patients with COPD.

Key Features

- Patient Assessment: Comprehensive template for the documentation of encounters with the patient.
- Tracking and Monitoring: Tools for tracking patient progress over time, including spirometry results, medication adherence, and exacerbation frequency.
- Data Integration: Seamless integration with existing EMR functionalities, allowing for easy access to patient records, lab results, and other relevant health information.
- Care Plans: Customizable care plans tailored to each patient's needs, including medication management, lifestyle interventions, and self-management resources.

Using the E2P COPD Management Tool in OSCAR Pro

Navigating to the modules within the tool

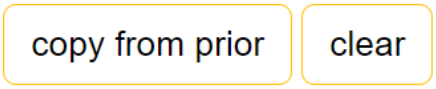
(Found on the top of each module)
The components related to the care provision for COPD have been broken into sections.

Patient Dashboard

(Found on the left corner of each module)
Tabs:

- Metrics
- Labs
- History
- Resources

Pull from previous



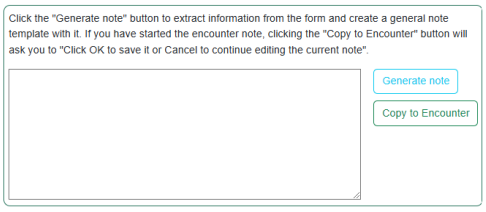
(At the top of each module)
After the tool has been completed in a prior visit, clicking the **copy from prior** button will pull all data for each section in the form.

- The **clear** button will clear all the sections.

Navigation Buttons

(At the bottom of each module)
There are navigation buttons to allow users to move through the tool without having to scroll up to the top navigation menu.

Generate Note



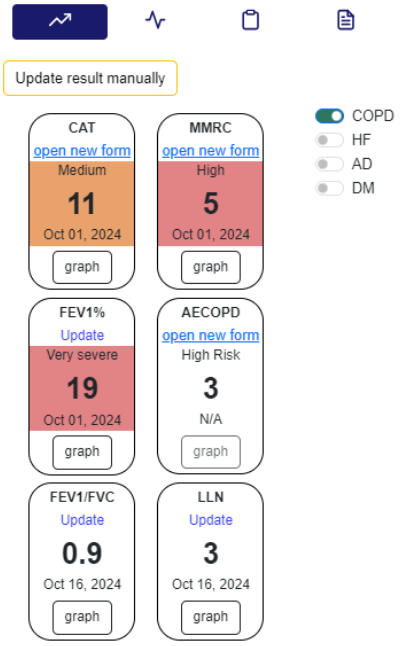
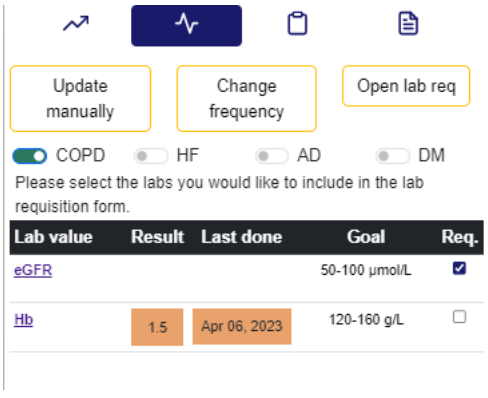
(At the bottom of each module)
The **Generate note button** will extract information from the form and create a general note template with it.
Copy to Encounter and paste it into the patient's note section.

Getting Started with the COPD Management Tool

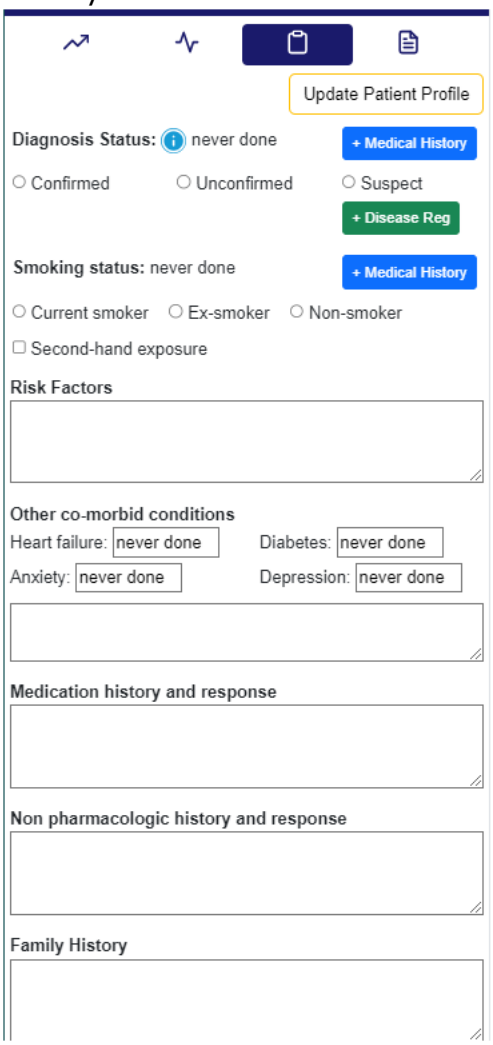
Dashboard

The dashboard gives clinicians the flexibility to show/hide the patient metrics, labs, history, or the resources panel alongside the main tool content to enhance documentation during patient encounters.

Recently implemented is the ability to combine showing measurements from other E2P tools (i.e., Heart Failure, Anxiety Disorders & Depression, and Diabetes). Users can toggle through the different measurements from one tool to the other. Our intention was to support the care of patients who may have multiple co-morbidities and allow the users to be able to view and address both in a single visit using just one tool.

Metrics Tab: 	Users can open and complete the COPD accessory forms CAT, MMRC, and AECOPD forms from this section. As well as review spirometry results. - After a questionnaire is submitted the visit form will update dynamically pulling in the most recent score. - We have also implemented the generate note functionality into these accessory forms. - CAT and mMRC scores can also be updated manually.
Lab Tab: 	Users can update values manually, change the targets and frequency to tailor the goals to the patient, and launch the lab requisition form. - Recently implemented is the ability to review labs from the other E2P Tools as well as the functionality to be able to add lab investigations that need to be ordered into the lab requisition form.

History Tab:



Users have the option to select Confirmed, Unconfirmed, or Suspect. The definitions for those status's will be explained in the blue information icon.
Clicking on **+ medical history** will insert a note into the medical history section to better integrate with the EMR. Users also have the option to add to the **+disease registry**, which the tool will automatically load the COPD code to support efficiency. Smoking status can be updated here.

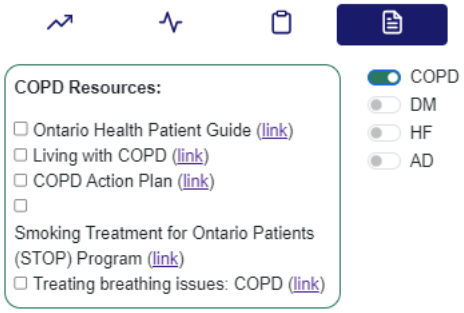
Record relevant risk factors related to any of the patient's chronic condition(s).

Other co-morbid conditions:
The tool will pull in the dates the other E2P Tools were completed for Heart Failure, Anxiety Disorders & Depression, or Diabetes.

Text area to document overall medication history, response, non-pharmacologic history and response, and family history.

Once this section has been completed, users can click **Update Patient Profile**.

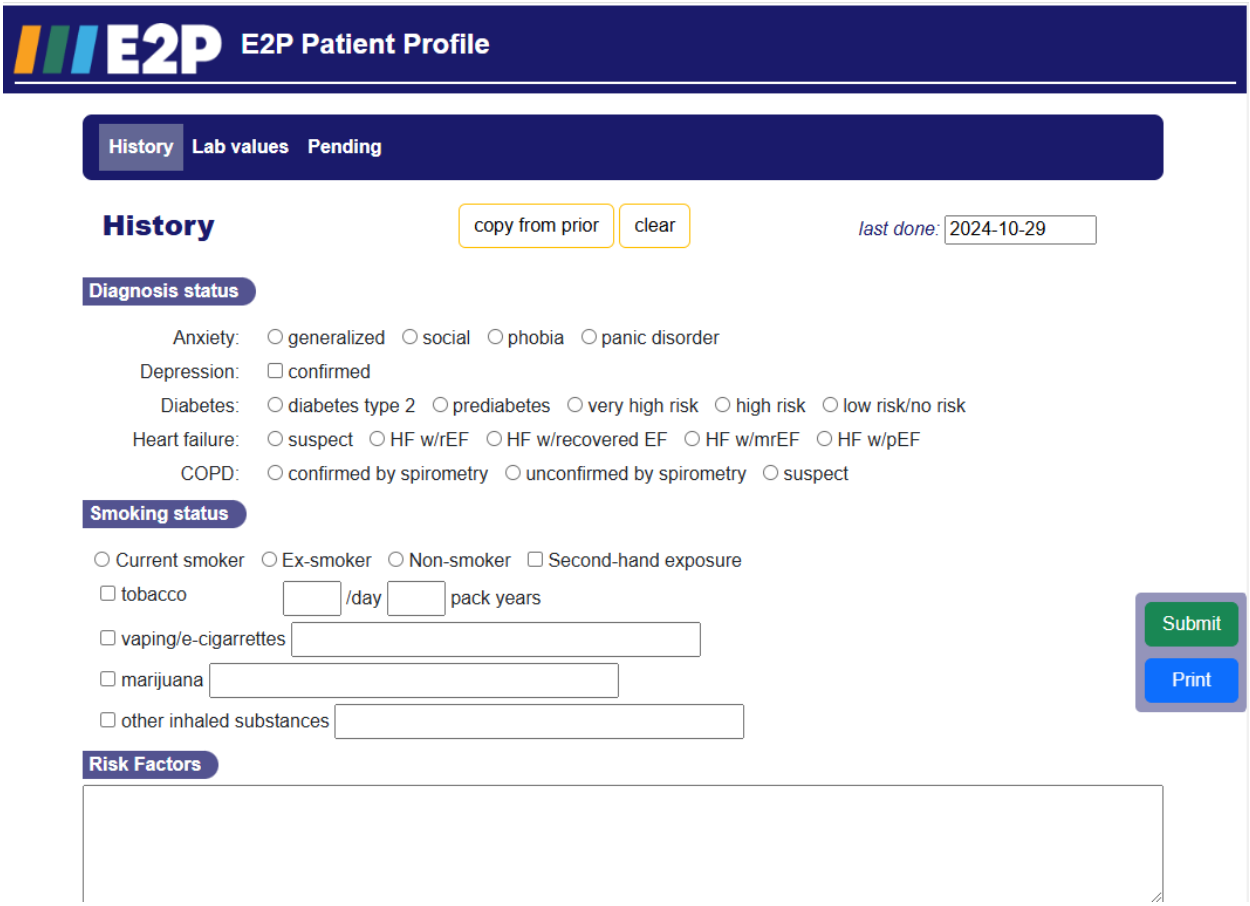
The patient profile tab will be automatically opened, updated and submitted.

Resources Tab: 	Quickly review the resources that were shared with the patient for all E2P tool-supported conditions from visits in the past. Checked resources will also appear on the patient care plan with URLs.

E2P Patient Profile

Designed to be a consolidated overview of the patient including the diagnosis status for all E2P tool-supported conditions. Users can record smoking status, risk factors, other co-morbid conditions, medication history and response, non-pharmacologic history and response, and family history.

This section enables users to update and tailor lab value targets and frequencies for each E2P tool-supported condition.



Launching Clinical Modules

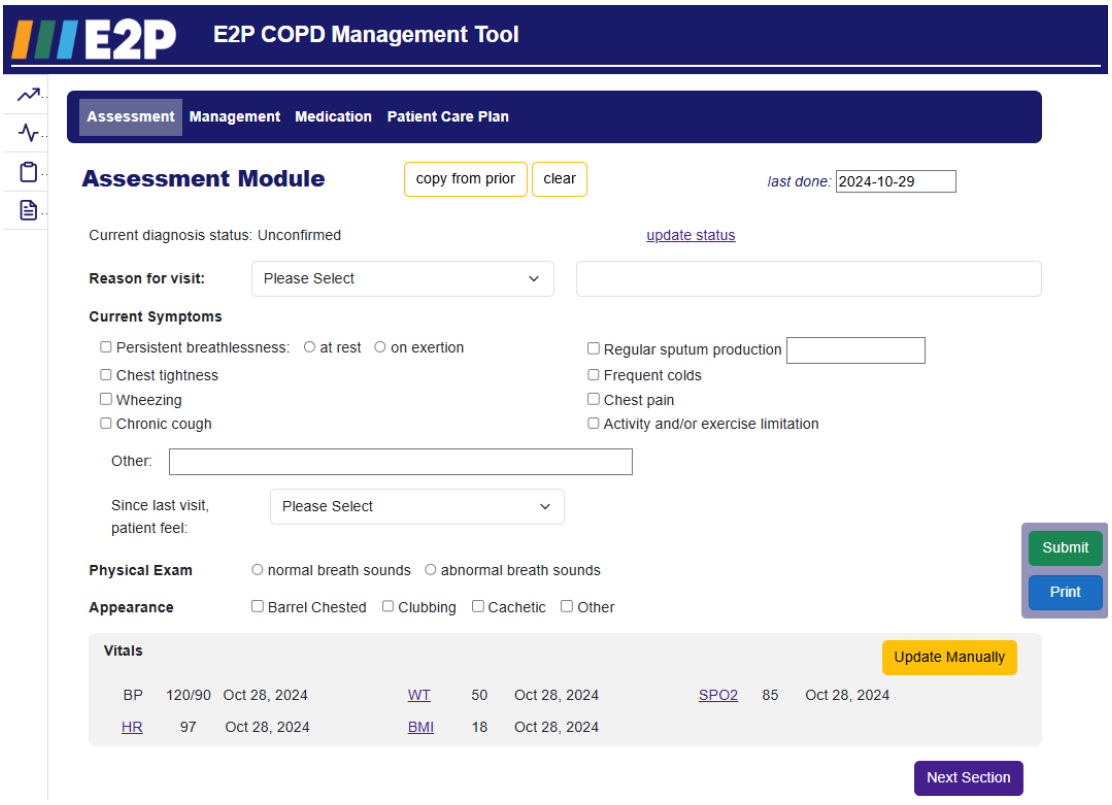
The components related to the provision of COPD care have been broken into 4 modules, allowing for flexibility. Users are not expected to complete every module at every visit but rather, users can complete the modules that were discussed/required updating during the patient encounter.

Assessment Module

This section is designed to facilitate comprehensive documentation and evaluation of each patient's condition, ensuring that all relevant information is captured for effective diagnosis and treatment planning.

The beginning of this section displays the current diagnosis status. Clicking on the update status button will require users to update the COPD diagnosis status in the history section within the dashboard.

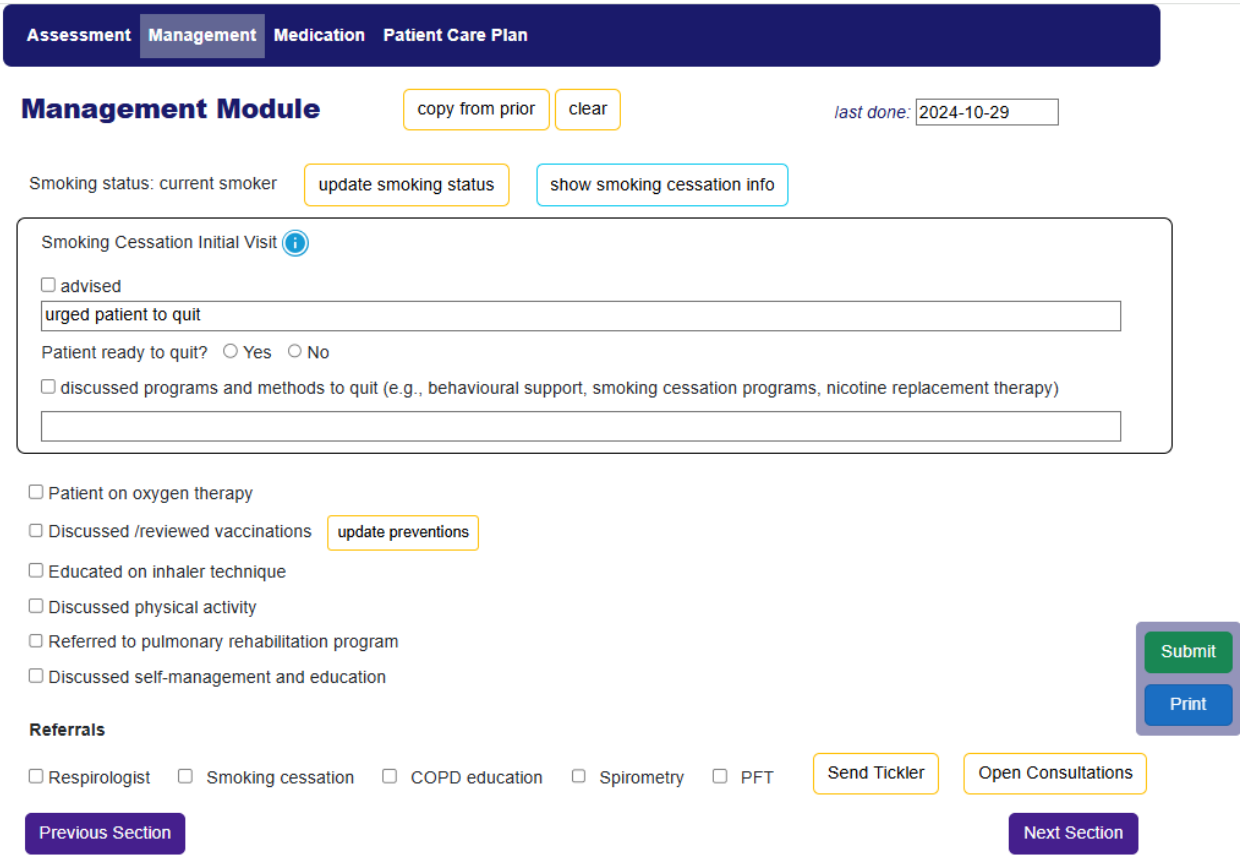
Key elements of this section include the reason for the visit, current symptoms, physical exam, appearance, and the ability to record and review the patient's current vital signs. These metrics are essential for evaluating the patient's stability and identifying any immediate concerns.



Management Module

The focus of this section is to optimize ongoing care and management of COPD. The areas that are addressed include smoking status, the ability to record if inhaler technique education was provided, notes of any discussions regarding physical activity, self-management strategies, and educational topics covered during the visit. Encouraging patients to engage in regular physical activity and providing them with tools to manage their condition can significantly enhance their ability to cope with COPD. The last key component of this section is the referrals area where users can document any referrals made to specialists, such as Respirologist, smoking cessation, COPD education, Spirometry, and PFT.

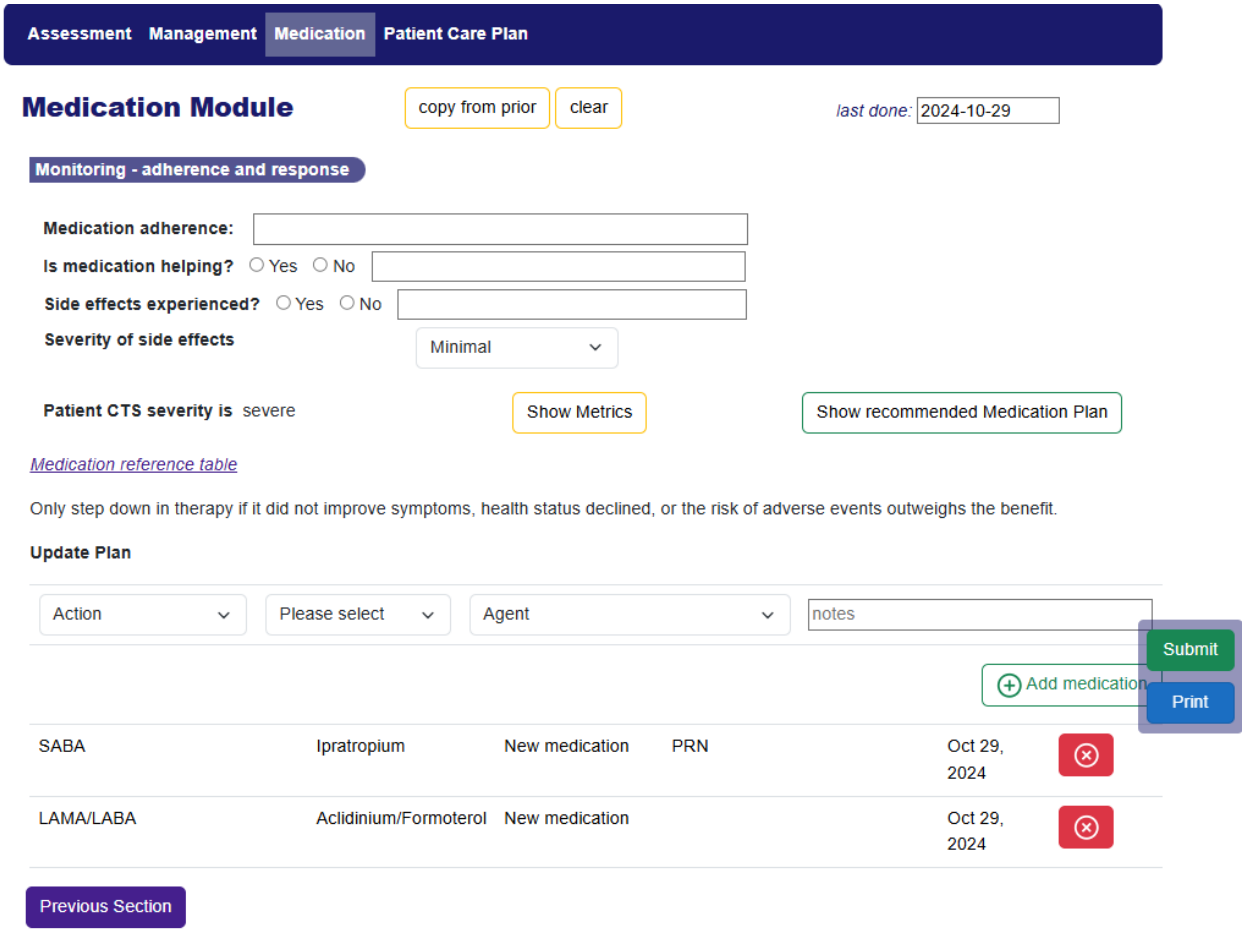
The section also includes functionality for sending Ticklers (internal messages within the EMR), as well as the ability to open the consultations window for seamless communication and collaboration among healthcare clinicians.



Medication Module

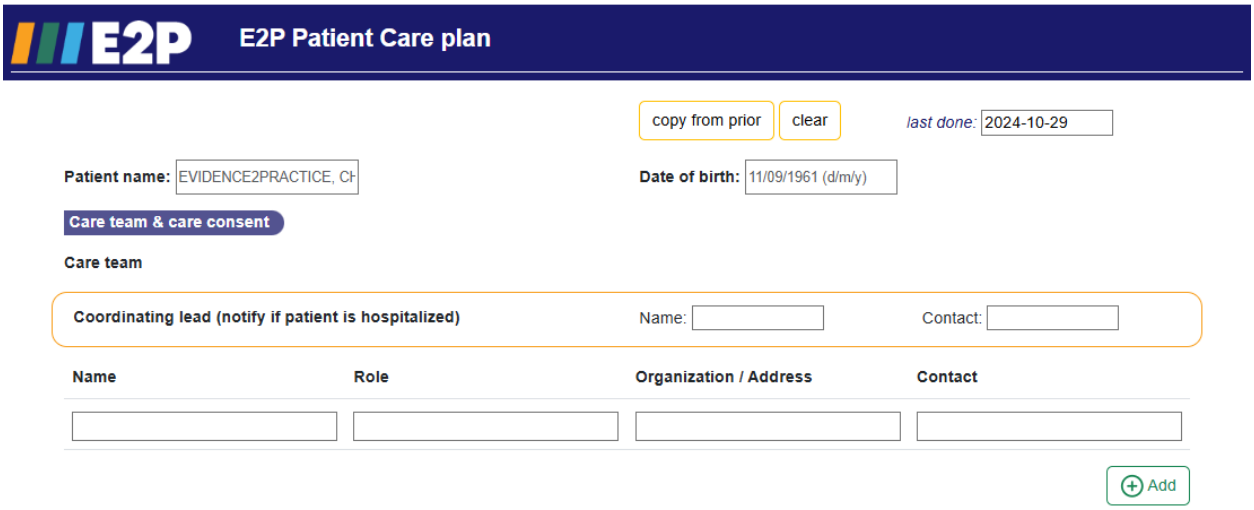
The emphasis of this section is the two key components related to medication management: the first addresses the patient's adherence and response to treatment, while the second outlines the comprehensive medication plan tailored to the patient's current health status and needs. Here users can view the recommended medication plan for the patient using an algorithm pulling in the information gathered in the tool i.e. CAT/MMRC scores, spirometry results, and acute exacerbations. Updating the plan creates a history of changes made to support achieving optimal treatment and documenting specific response and symptoms.

Users also will have access to the medication reference table to help make informed decisions on the best practice medication options.

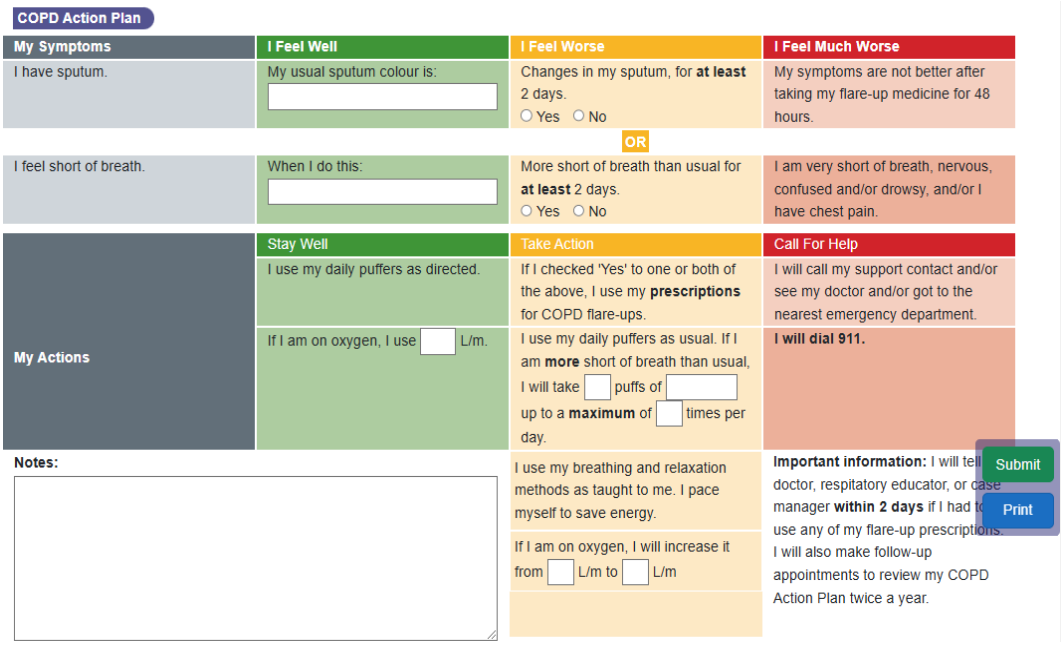


Patient Care Plan Module

The care plan module is a shared tool for all the E2P Tools and is meant to be a patient-facing resource. The Patient Care Plan is a comprehensive resource that outlines the patient's care team, consent, goals, allergies, lifestyle changes, medication plan, and follow-up/next steps. It also provides access to education resources for patients and caregivers, empowering them to better understand their chronic condition(s), and manage their condition(s) effectively.



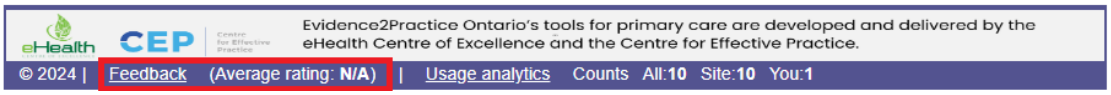
The COPD Action Plan can be found here as well, primary care clinicians can complete this document and share it with the patient via email or hard copy.



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 links can be found at the bottom of every module. It will look like this:



Usage Analytics

The eHealth Centre of Excellence tracks usage to understand the extent to which our tools are being used. We are committed to protecting the data we are collecting and sharing. With our EMR usage analytics program, we collect general information about your usage (e.g., clinic name, name of tool used, date of usage, clinician type, anonymized clinician ID, and anonymized patient ID). **There is absolutely no Personal Health Information (PHI) collected by usage analytics**, and no assessment of clinical knowledge or expertise is made. Information collected by usage analytics may be shared with external organizations, such as funding bodies and evaluators, to support program evaluation, sustainability, and future funding opportunities.

Participation in usage analytics is optional and you may withdraw your participation at any time. Your participation ensures that E2P tools are meeting the needs of frontline clinicians. You would be supporting the meaningful adoption of clinical guidelines, as well as the development of future tools and updates. It's an easy method of supporting quality improvement - you don't have to do anything!

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

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.