

**Disclaimer**

Please allocate **30–60 minutes** for this installation process and note that it is crucial that ALL lab results are added to optimize functionality. The change management team at the eHealth Centre of Excellence (supporting the E2P program) would be happy to help if you require assistance with installation. Please reach out to [EMRtools@ehealthce.ca](mailto:EMRtools@ehealthce.ca) to schedule a time.



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**Introduction**

Configuring the tool involves 2 main activities: 1) creating lab values and 2) mapping those values in the form.

Creating the lab values is a fairly simple process, oftentimes, you may already have some of these lab values already created so you may be able to skip the steps. Some values are specific to the E2P tool and are intended to support the clinical workflow by enabling the date the tool was last completed to be tracked and pulled to the current visit with the patient.

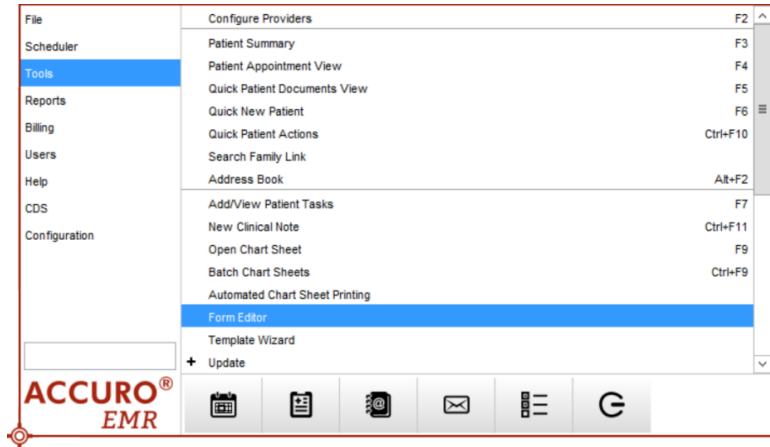
The purpose of mapping the lab values is to enable lab results to be pulled into the tool automatically allowing you to review all relevant labs quickly and easily during a patient appointment.

## Downloading the E2P Tool

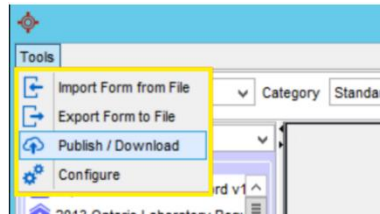
You do not need to have administrative privileges to download the tool.

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.

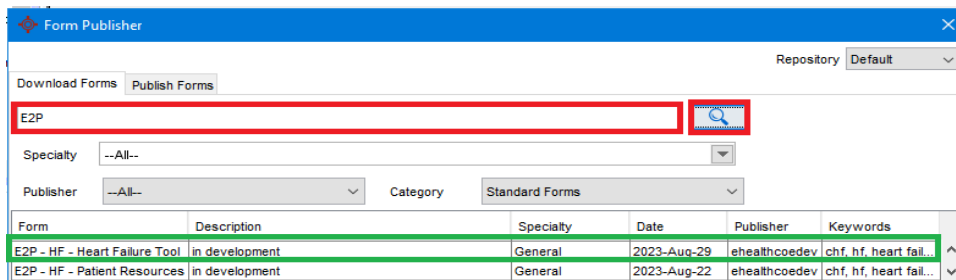


Within the Form Editor, click the top left **Tools** button and select the **Publish/Download** option.



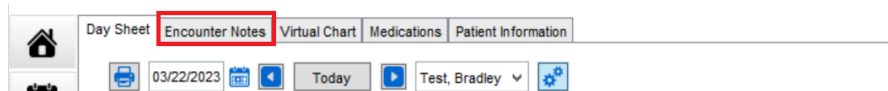
The Form Publisher window will open. To find the tool:

1. In **Red**, you enter "E2P" into the search bar, then click the magnifying glass to search.
2. Search and select "**E2P – HF – Heart Failure Tool**" in the list, shown in **Green**.
3. Finally, click **Download** to import it into your Accuro EMR, shown in **Purple**.



## Step 1: Configuring the Lab Results

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



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

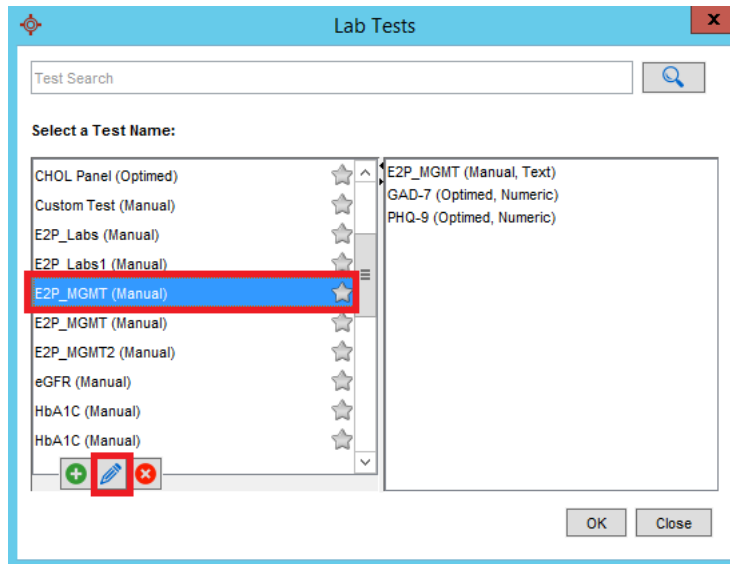
**a) Add to Existing Lab Tests**

For users who have installed other E2P tools, the lab tests: E2P\_MGMT & E2P\_Labs may have already been created. Users will still be required to add the lab values to the lab tests.

1. To manage Lab Tests, click on the **green plus button**.



2. Search for “**E2P\_MGMT**” in the lab tests list on the left.
3. Click the pencil icon to edit the lab test.



4. The following are the values you will need to be added for the E2P Heart Failure Tool:

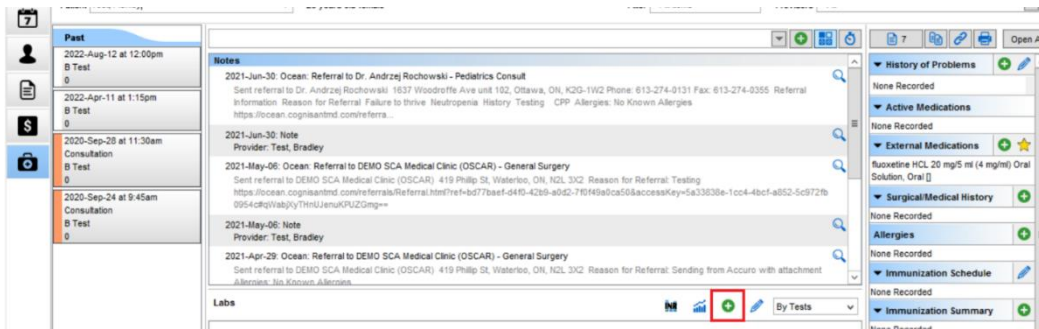
Lab Test: E2P_MGMT	
Lab Value Name	Result Criteria
E2P_HF	Source: <b>Manual</b> Data Type: <b>Text</b>

5. To add the remaining lab values:
6. Click the **green plus sign** to add the Lab Value.
  - a. Click New and title it “E2P\_HF”.
  - b. The Edit the Result window should open, enter the details from the table above.
  - c. Then click “**OK**”.
  - d. Select the “E2P\_HF” line and click “OK”.
7. [Then skip to mapping the lab values to the form.](#)

**b) Create New Lab Tests**

If the lab results do not exist, you will need to manually create them for the tool to function properly.

- To manage Lab Tests, click on the **green plus button** (\*Lab Test in Accuro represents a Group of Test Results).

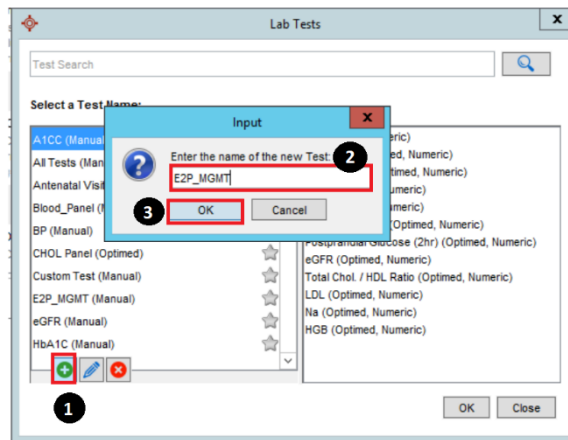


**Lab Test: E2P\_MGMT**

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

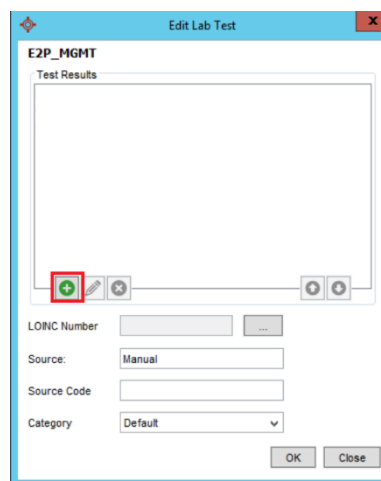
Then Enter the name for the new Lab Test: **"E2P\_MGMT"**.

Then click **OK**.



This should open the Edit Lab Test Window.

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



### Creating the Lab Value: E2P\_HF

From here click

**New** Title it:

"E2P\_HF".

(Value of completed, so the form can pull the last done date.)

Edit the Result window will open.

Enter the following:

- Source: **Manual**
- Data Type: **Text**

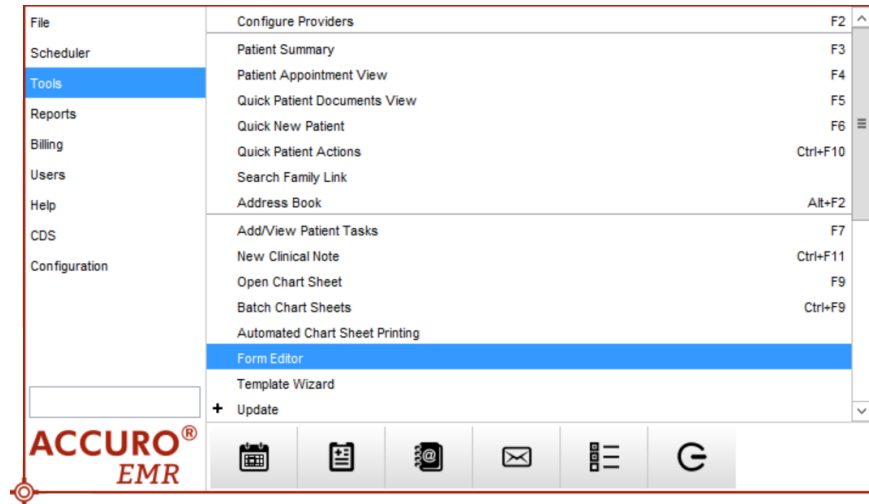
Then click "OK"

Then **Click** on the E2P\_HF result line and click **OK** to add it to the Lab Test.

Result	Source	Data Type	Units
E2P_HF	Manual	Text	

## Step 2: Mapping Form Elements

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

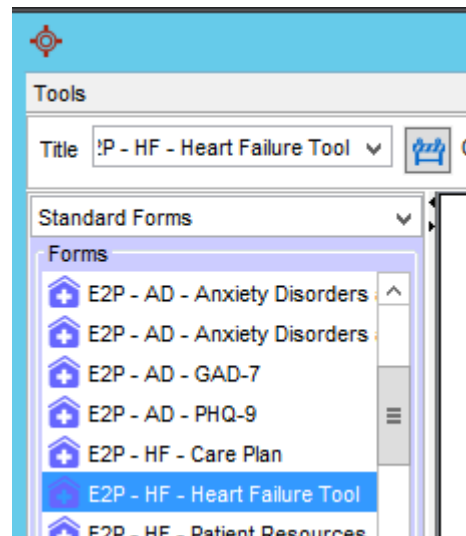


Look for the **E2P Heart Failure Tool** in the **Standard Forms list**.

**Click** on the tool name line to select the tool.

### Page 1

Stay on Page 1: Assessment Module.



Once the tool appears, select **Last Completed:** Right-click and select **Edit**.

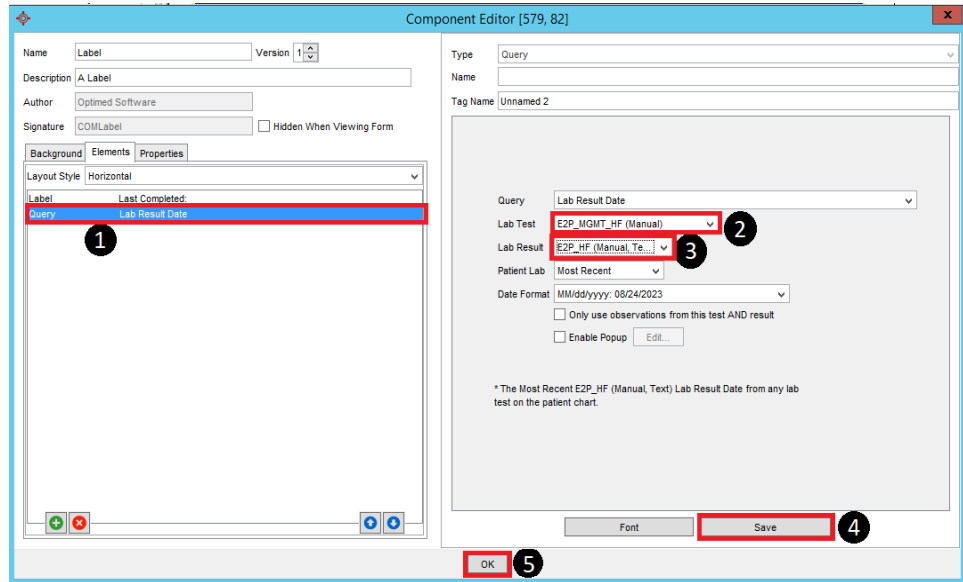


Navigate to Elements.

Select **Query**  
Click Lab Test and select **"E2P\_MGMT"**.

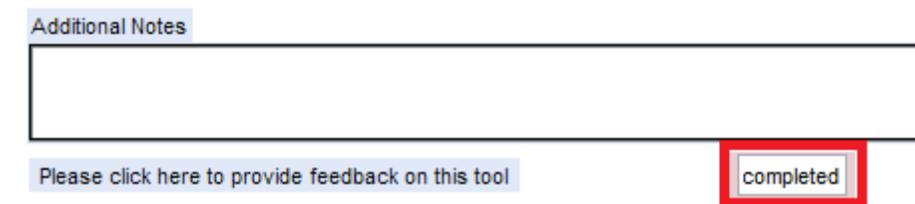
Click Lab Result and select **"E2P\_HF (Manual, Text)"**.

Click **Save** and **OK**.



Scroll to the bottom of the page.

Select: **completed**  
Right-click and select **Edit**.

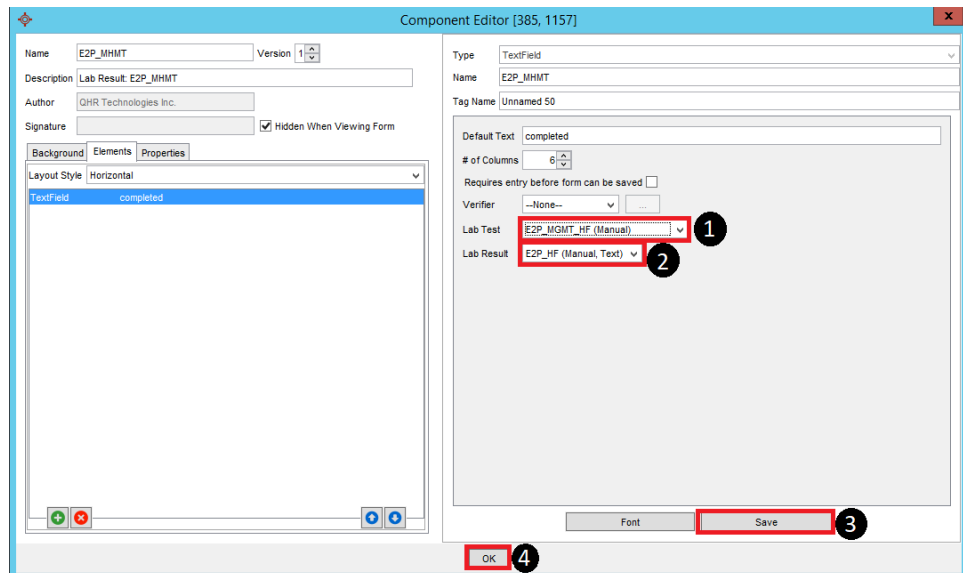


The Component Editor window will open.

Click Lab Test and select **"E2P\_MGMT"**.

Click Lab Result and select **"E2P\_HF (Manual, Text)"**.

Click **Save** and **OK**.



**Page 2**

Go to page 2:  
Management &  
Medications  
Module.

Select **Last Completed:**  
Right-click and  
select **Edit**.

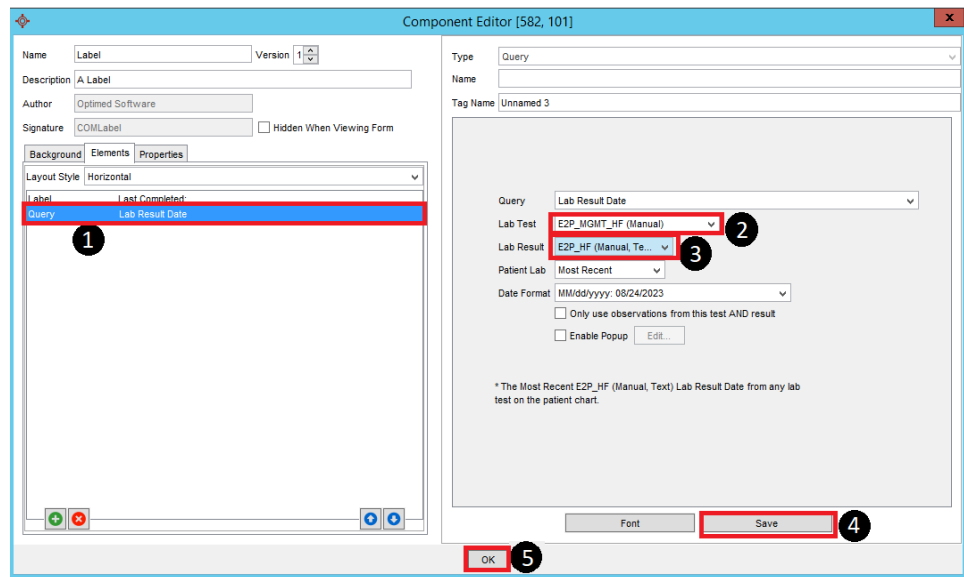


The Component Editor window will open.

Click Lab Test and select  
"E2P\_MGMT".

Click Lab Result and select  
"E2P\_HF (Manual, Text)".

Click **Save** and  
**OK**.





Scroll to the bottom of the page.

Additional Notes

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Please click here to provide feedback on this tool completed

Select: **completed**.

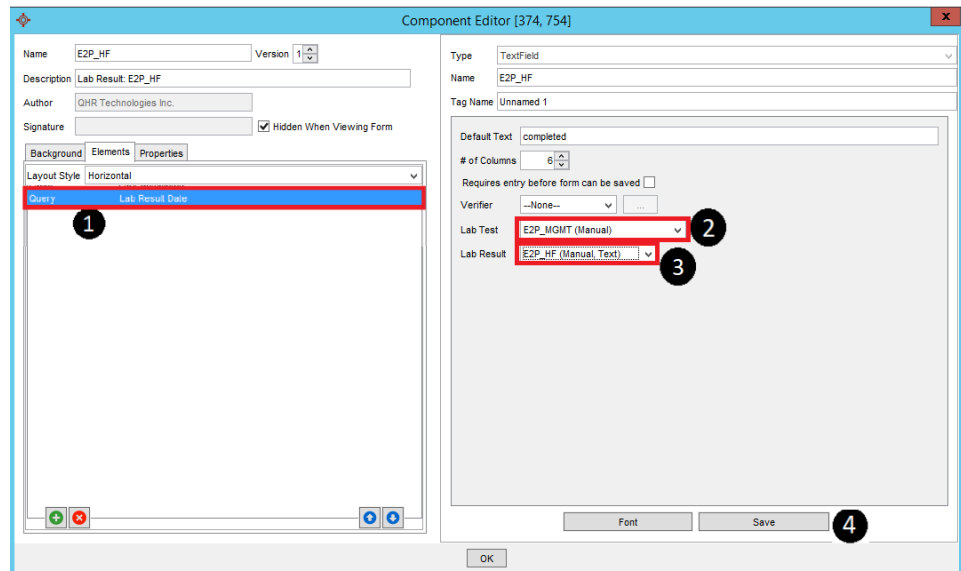
Right-click and select **Edit**.

The Component Editor window will open.

Click Lab Test and select **"E2P\_MGMT"**.

Click Lab Result and select **"E2P\_HF (Manual, Text)"**.

Click **Save** and **OK**.



1. Make sure to click on the **orange construction sign** to make it available; it will turn blue.
2. Click on the top right **file button** to save.
3. Then click **OK** in the Save Form window.
4. And finally, click **OK** at the bottom to save your work.

The screenshot shows the 'Patient care plan' form in the E2P Heart Failure Tool. The form is divided into three zones: GREEN (All Clear), YELLOW (Caution), and RED (Medical alert). The 'Save Form' dialog box is open, showing 'Save completed.' and an 'OK' button. The bottom of the form has a 'View', 'OK', and 'Close' button bar. The form includes sections for 'Palliative Approach to Care' and 'Physical support plan'.

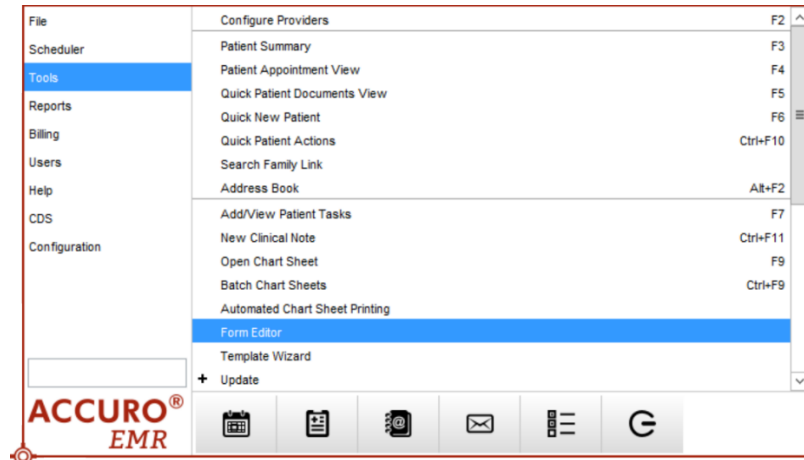
You are now ready to use the tool!

## New Tool Version Process

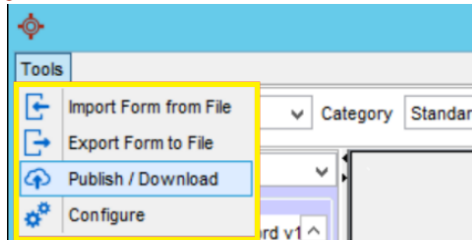
Once a new tool version has been released, please follow these steps to update the tool in your EMR. You might have been notified that a new version for the E2P heart failure tool is available via email.

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.



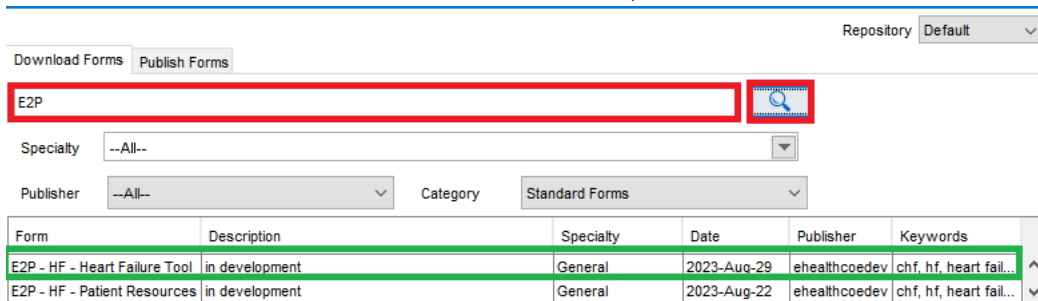
Within the Form Editor, click the top left **Tools** button and select the **Publish/Download** option.



The Form Publisher window will open.

To find the tool:

1. In **Red**, you enter “E2P” into the search bar.
2. Select “E2P – HF – Heart Failure Tool” in the list, shown in **Green**.



3. Finally, click **Download** to import it 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 links can be found at the bottom of pages: 1, 4, and 5. It will look like this:

Please click here to provide feedback on this tool



## E2P - HF - Heart Failure Tool Feedback

Feedback is anonymous by default. If you would like to be contacted regarding your feedback, please fill out the contact information section below.

Feedback:

How would you rate your experience with the tool?

Comments

\*Please do not add any identifiable or potentially identifiable data in your response  
e.g., Personal Health Information or sensitive data\*

## Contact

If you have any questions or need support, please reach out to [EMRtools@ehealthce.ca](mailto:EMRtools@ehealthce.ca) and we will be happy to help!



## Appendix

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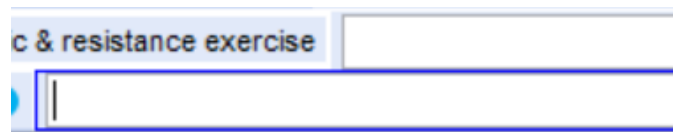
[How to Change the Size of a Text Box.....](#)13

[How to Change the orientation of the medication list .....](#)14

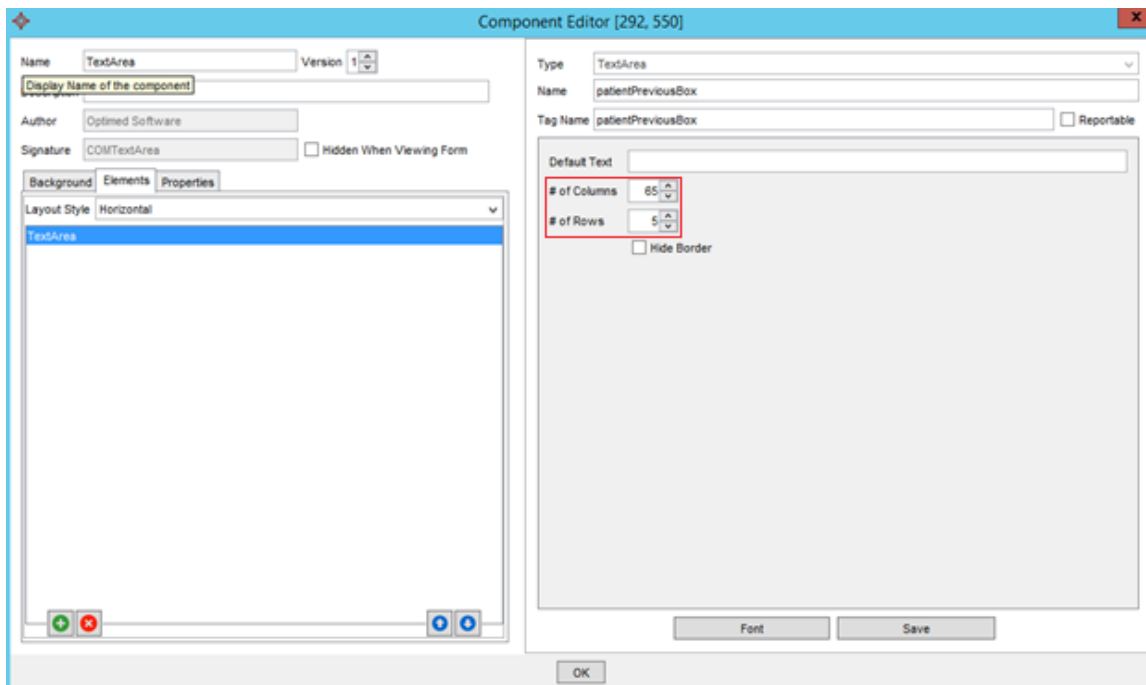
[How to fix the checkboxes in the patient resources page .....](#)15

### How to change the size of a text box

1. From the Accuro EMR, click on the Accuro target menu icon. Then select **Tools** followed by **Form Editor** to launch the form editor window.
2. Double click on the E2P tool to open the form.
3. Right click on the text box you want to adjust the size of then choose Edit.



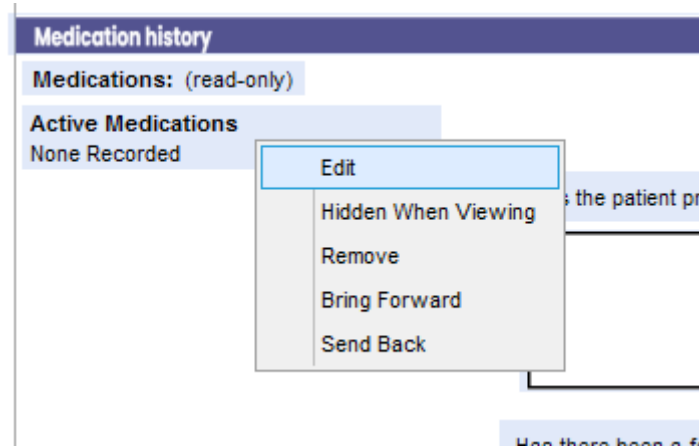
4. Options for editing the # of columns and # of rows which will change the size of the box are listed on the right of the screen.
  - a. We suggest noting the original dimensions of the areas you are editing in case you want to revert.



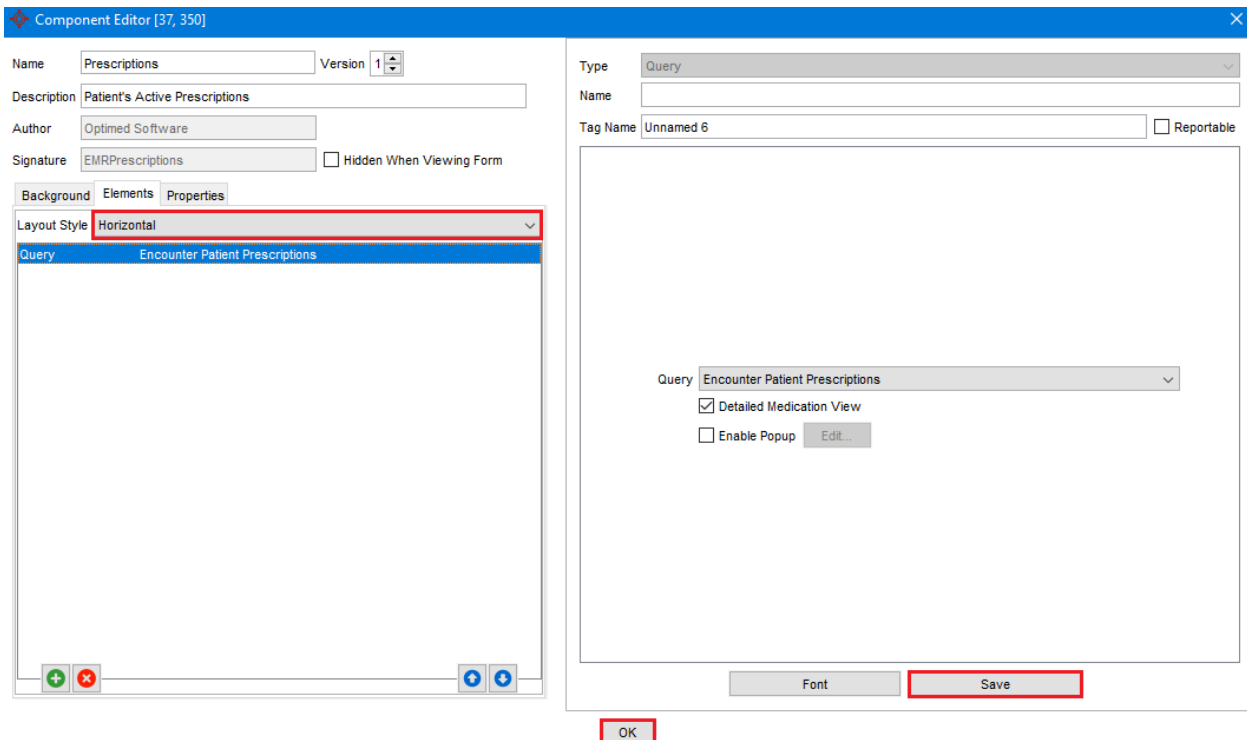
5. Once you are happy with the new dimensions, click **Save**, then **OK**.

## How to change the orientation of the active or external medication list

1. To edit the medication History box right click on **Active Medications** and choose **Edit**.



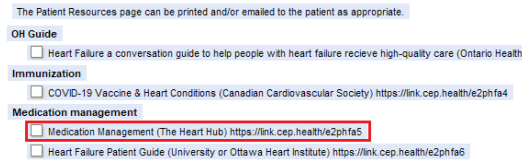
2. The default setting for the medication section is vertical. Horizontal and custom options are also available where the columns can be adjusted as needed.



3. Once you are happy with the new layout, click **Save**, then **OK**.

## How fix the checkboxes in the patient resources page:

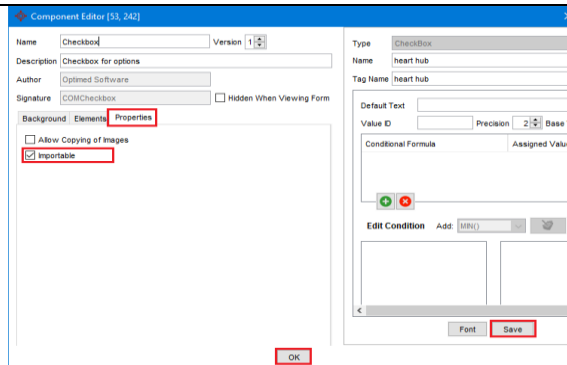
1. Navigate to the **Form Editor**.
2. Search for **E2P – HF – Patient Resources**, and double-click to open.
3. Navigate to the checkbox titled: **“Medication Management (The Heart Hub)”**, right-click and select **“Edit”**.



On the Left-hand side, click on **“Properties”**.

Check the checkbox titled **“Importable”**.

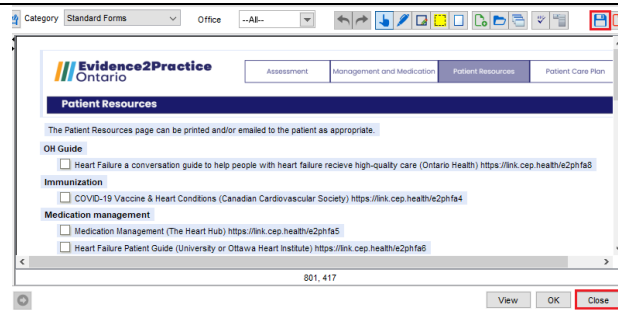
Click **Save**, then **OK**.



4. Repeat for the remaining checkboxes.



5. Once finished, click the **save icon** on the top right corner of the window.
6. Then click **closed**.



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.