

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



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

# Installation Guide: Table of Contents

Not	ices	.2			
A.	Remove Old E2P Forms	.3			
B.	Import the Custom Forms	.4			
C.	Import Flowsheet	.5			
D.	Set Up Reminders	.6			
Ар	oendix	.9			
E	2P Custom Vitals	.9			
Тос	Fool Feedback10				
Nev	New Tool Version Process				
Ove	Overview of Usage Analytics10				



### Notices

#### \*Please be advised of the following common events and issues that occur during the tool

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**Problem:** Some users have found that inserting the "E2P - HF - Main Form Toolkit" custom form directly into the patient chart (instead of viewing the form in its intended pop-up) has resulted in errors when attempting to launch the screening or visit custom forms.

Solution: Since the "E2P - HF - Main Form Toolkit" does not include any data ordocumentation, it is recommended that all instances of this custom form be deletedfromthepatientchart.To do this

To do this,

1.

- 1. Search for "E2P HF Main Form Toolkit" in the notes section of the patient's chart.
- 2. Navigate to the line, right-click, and select "Delete".
- 3. Repeat for all remaining inserts.

For assistance, please reach out to EMRtools@ehealthce.ca and we will be happy to help!

#### 2. Form rendering issue.

Litestlye and self-managemen Considerations	Lab value	Latest result	Lastdone	Goal	Resources and care plan 🔵	
Diabetes management should be an interactive and collaboration offer	rt e Blogen	he clinician and pa	HANY 27-12023		person-centered Afocusing on aire	
Due Erectile dysfunction Nutrice available to them.	HDL-C	0.96	Nov 27, 2023	>=1.6 mmol/L	_	
>150 <sup>3</sup> #1.99%eek <sup>ev</sup> 1719950 Hinsweek distriged se ob B' & western de tiget and a to the state of the secon Tommol/L						
(Smoking status) never done discussed progress and methods to quit						
Sickday management educated patients on planning for sickdays						
Driving guidelines Teducated on driving safely (using insulin or insulin secretagogues)						
Glucose self-monitoring Counselled Referred to diabe	teseducatio	on centre/program				

**Problem:** All sites will experience the form overlapping issue on the first opening of the tools after installation/update.

**Solution:** Unfortunately, this is a known PS Suite error. Once each section of the tool has been opened once: Assessment, Medications, Management, the issue will be resolved.

\*Please note that this will only happen once, you will not encounter this for each patient.



# Evidence2Practice Ontario (E2P) Tool Installation Guide

#### A. Remove Old E2P Forms

\*Please note: For users who have installed previous versions of any E2P tools (ending 1.0.0 or 1.1) and would like to remove the old E2P forms from their EMR, please follow these steps. Otherwise please skip to <u>Step B.</u>

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

😵 Patient Record - Test, Twilight						
Settings Patient View Data Letter 🌼 🛛	5					
Choose Patient Edit Stamps						
Edit Custom Forms						
Edit Searches						
Edit Cohorts						
	d - Test, Twilight          Settings       Patient       View       Data       Letter       (*)       [2]         Edit       Stamps         Edit       Custom       Forms         Edit       Searches         Edit       Cohorts					

 In the Forms window, enter "E2P" into the search bar.

🕈 Forms >					
File					
Only show forms containing: e2p		Create Encounter Assistant			
E2P - Care Plan (old version)	<u>^</u>				
E2p - Care Plan Combined_vDDEdits		Create Form			
E2P - DM - Clinical Assessment PSS					
E2P - DM - Criteria Form		Edit Form			
E2P - DM - Main Form Toolkit PSS					
E2P - DM - Management Plan PSS		Duplicate			
E2P - DM - Medication Module PSS					

 Click on the form line you would like to deactivate, then right-click and select Deactivate Form. Forms

File				
Only show forms containing: e2p	)			Create Encounter Assistant
E2P - DM - Criteria Form			~	
E2P - DM - Main Form Toolkit PS	SS			Create Form
E2P - DM - Management Plan P	SS			
E2P - DM - Medication Module P	SS			Edit Form
E2P - DM - Risk Factors				
E2P - DM - Screening and Diagr	nosis PSS			Duplicate
E2P - DM - Visit Form PSS				
E2P - DM - Visit form_v12				
E2P - DRAFT Care Plan and Res	sources			
E2P - HF - Care Plan				
E2P - HF - Clinical Assessment	PSS v1.0.0			
E2P - HF - Clinical Assessm	Edit Form		Т.	
E2P - HF - Clinical Assessm	cultionn			
E2P - HF - Main Form Toolk	Rename Form			
E2P - HF - Main Form Toolk	Duplicate Form			
E2P - HF - Main Form Toolk	Deactivate Form			
E2P - HF - Management Pla				
E2P - HF - Management Plan PS				
E2P - HF - Management Plan PS				
E2P - HF - Medication Module P	SS			
E2P - HF - Medication Module P	SS Duplicate			Done
E2P - HF - Medication Module P	SS v1.0.0		¥	

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#### **B. Import the Custom Forms**

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

1.	In PS Suite EMR, from the <b>Records</b> window, choose <b>Settings &gt; Edit</b> <b>Custom Forms</b> .	PS Suite® EMR (TEST) File Settings Reports M Dr. Catherine Luangxay Logout   Appointments   Dashboard > Patient Recor	essages Window Help 🔅 🗸 🗹 Patients Inpatients Clients   Address Book   Handouts Messages Records d - Test, Twilight
		File Edit Style	Settings Patient View Data Letter (*)
		<	Edit Custom Forms
		Family Hx	Edit Searches Edit Cohorts
		Problem List	Edit Reminders
0	la tha <b>F</b> arman air daon	Forms	×
2.	In the <b>Forms</b> window, from the <b>File</b> menu, choose <b>Import Form(s)</b> .	New Custom Form. New Encounter Ass Edit Form	Ctrl+N Create Encounter Assistant istant Ctrl+Shift+N Ctrl+E Create Form
		Rename Form Duplicate Form Deactivate Form	Ctrl+R Ctrl+D Duplicate
		Import Form(s) Export Form(s) Show Revision Histo	Dry

- 3. Navigate to your computer's desktop and double-click the folder that contains the custom form files.
- 4. Click the **custom form(s)** in the list that you want to import.
- 5. Click the Choose button. If you are importing multiple forms at once, and depending on the speed of your computer, the import may take 30 seconds or more. A message will prompt you when the import is successful.



## **C. Import Flowsheet**

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

~	Show Demographics	Ctrl+D
	Hide Resolved Problems	
	Show Last Renewal and Update D	ates
<	Hide Profile	Ctrl+W
	Hide Reminders Toolbar	Ctrl+Alt+W
:=	Show Table of Contents	Ctrl+Shift+T
ø	Hide Attached Messages	Alt+Shift+M
	Show Lab Table	Ctrl+T
	Show Flowsheet	F1

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

Add Flowsheet for this Patient Add Global Flowsheet	Ctrl+A	eet for Mya Test 🗸 🗸
Rename This Flowsheet Delete Flowsheet		
Print	Ctrl+P	
Utilities	>	Import Flowsheet Template
		Export Flowsheet Template
		Export as Tab Delimited
		Export as HTML

- 3. Navigate to your **computer's desktop** and double-click the folder that contains the flowsheet files.
- 4. Click the **flowsheet(s)** in the list that you want to import. The flowsheets will be "**.flowsheet**" files.
- 5. Click the **Choose** button. The import may take 30 seconds or more. A message will prompt you when the import is successful.



### **D. Set Up Reminders**

 In PS Suite EMR, click Settings > Edit Reminders.



2. Click **New Reminder** at the bottom.



3. Enter **"E2P Toolbar**" as the name for the reminder. Then click **Add Line**.

CEnter search text>	_	Reminder Name: E	2P Toolbar			
Reminders						
E2P Toolbar	~					
1AB-COVID-19 Toolbar						
AFHTO Opioid Only PSS Front						
AFHTO Opioids						
alan depression temp reminder						
Alan - Greenbrook Nursing Test						
alan test angela holdbrook						
alan test smoking reminder						
Alan toolbar 1.0						
Andrew Street FHO Toolbar T						
amprior toolbar						
ASA Candidates						
atypical antipsychotic bw remi						
AV						
AV diabetes test						
belmont test						
bipolar tracking						
Bisphosphonate test						
CDM - Reminder		Dolo	to Line		-	Add Lina
Chronic Non Cancer Pain CNC		Dele	te une	т	•	Add Life
CND OHT IFMT - Frailty Remin		Inda	ntline ->		Edit Line	<- Outdast Line
Cond_BMD-Osteoporosis Oste		Inde	and Line ->		Luit Line	<- Outdent Line
Cond_BW-Bariatric Surgery M	v	Comments:				
Show Intervention as Reminder:						
chan Carlos Francisco Channel	h					
Show Custom Form or Stamp:		N/A			$\sim$	
ritu O High (acon d	ailv	) () ()	1edium (reminder repo	rt)	<ul> <li>Low (next visit)</li> </ul>	<ul> <li>Ignore (do not evalu</li> </ul>



Option 1: To enable the toolbar to only show for ONE user: follow step 4a, then proceed to step 5.

4a. Click <b>Other &gt;</b>	💽 Add Search Criterion			
Current User	Demographics	Current Doctor Initials	contains	<b>a</b>
Initials > contains	Patient Profile Visits	Current User's Role Current User Initials	contains the word does not contain the word	
> enter PSS initials.	vitais Immunizations Treatment Allergies CPP Problems	l oday s Date	does not contain is is not is empty is not empty starts with ends with	
Then click " <b>OK</b> ".	I reatment Allergies CPP Past Medical History CPP Past Medical History CPP Risk Factors Lab Values Lab Text Diagnostic Imaging Diagnostic Test Reports Consultation Report Miscellaneous Letters Medical Report Custom Forms Cohorts Pending Tests/Consults Bills Appointments All Text Notes Other Restrictions Nested Reminder Scoring			

Option 2: To enable the toolbar to show for ALL users: follow step 4b, then proceed to step 5.





🔹 Edit Reminders

×

_		Edit		
5.	Click Show	Center search text>	Reminder Name: F2P Toolbar	
	Custom Form	Reminders	Current User Initials contains CL	
	or Stamps and	E2P Toolbar A 1AB-COVID-19 Toolbar		
	select	AFHTO Opioid Only PSS Front AFHTO Opioids		
	"E2P –	alan depression temp reminder Alan - Greenbrook Nursing Test		
	Toolbar".	alan test angela holdbrook alan test smoking reminder Alan toolbar 1.0 Andrew Street FHO Toolbar T		
6.	Ensure the	arnprior toolbar ASA Candidates		
	Priority is set to	atypical antipsychotic bw remi AV		
	"Medium".	AV diabetes test belmont test bipolar tracking Bisphosphonate test		
		CDM - Reminder Chronic Non Cancer Pain CNC	Delete Line	Add Line
		CND OHT IFMT - Frailty Remin Cond_BMD-Osteoporosis Oste	Indent Line -> Edit Line	<- Outdent Line
	Then click <b>Done</b>	Cond_BW-Bariatric Surgery M	Comments:	
	to save your	Show Intervention as Reminder:		
	work.	Show Custom Form or Stamp: Priority:     High (scan daily	()  Medium (reminder report)  Low (next visit)	◯ Ignore (do not evaluate)
		Delete Reminder	Cancel Add	Done



# Appendix

#### **E2P Custom Vitals**

Tool	Custom Vital	Purpose
	Name	
Heart Failure	<ul> <li>@Hfdiagnosis</li> <li>Suspect</li> <li>Reduced</li> <li>Midrange</li> <li>Preserved</li> <li>Recovered</li> <li>Riskreviewed</li> <li>@LVEF</li> </ul>	Gives the tool the ability to track the diagnosis progression. Records the left ventricular ejection fraction.
	@NYHA	Records the New York Heart Association score dyspnea.
Anviety	@SPIN	Records the rating for social anxiety disorder or social phobia via Social Phobia Inventory Test.
Disorders & Depression	@PDSS	Records the severity of panic attacks and panic disorder symptoms via Panic Disorder Severity Scale.
	@SpecificPhobia	Records the severity of specific phobia.
Anxiety Disorders &	@PHQ-9	Records the severity of depression via Patient Health Questionnaire-9.
Depression + Diabetes	@GAD-7	Records the severity of anxiety via Generalized anxiety disorder-7 assessment.
	<ul><li>@COPDDX</li><li>Suspect</li><li>Confirmed</li><li>Unconfirmed</li></ul>	Records the COPD Diagnosis Status. Also gives the tool the ability to track the diagnosis progression.
	@AECOPD	Records number of acute COPD exacerbations.
COPD	@DyspneaScale	Records the mMRC Dyspnea Scale Score.
	@CAT	Records the COPD Assessment Tool Score.
	@FEV1	Records the FEV1 (Spirometry Result).
	@FEV1FVC	Records the Absolute FEV1/FVC ratio (Spirometry).
	@LLN	Records the lower limit of normal value for spirometry.s



## **Tool Feedback**

We would love to hear your feedback! Using the newly embedded feedback link, you are welcome to share your thoughts and opinions regarding the tool. We've also included the ability to share your input anonymously or you have the option to include your email address if you would like to be contacted in the future.

\*Links can be found at the footer of each tool next to the usage analytics link

	Feedback for: E2P - HF - Main Form Toolkit PSS		
New	Submit feedback anonymously Not satisfied Comments:	Ratings Average 8.38	Tool Versio
	I am willing to be contacted in the future to provide feedback on this tool.	-	Proces

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

- 1. Download the tool file package on the eHealth Centre of Excellence's Community Portal.
- 2. Follow this guide to import the tool into the EMR.

Please note that you will not need to delete the old tool file from your EMR, but you are free to do so if you would like to keep your EMR clean and avoid any confusion.

### **Overview of 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 way to support quality improvement - you don't have to do anything!

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

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.

