

Updated: April 2025*

This guide is the most recent version of the tool: **Version 1.1.**

As part of the Evidence2Practice Ontario (E2P) program, [Amplify Care](#) (formerly 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@amplifycare.com and we will be happy to help!

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Anxiety Disorders & Depression Tool v. 1.1 – 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: Clinical Assessment, Medication, Management, and Patient Resources. The tools have been developed to support clinicians in the diagnosis, assessment, treatment, and/or management of patients.

The E2P anxiety disorders and depression EMR tool has been designed to support clinicians with early identification, comprehensive assessment, and timely diagnostic clarifications, using digitally embedded validated tools for anxiety disorders and depression in adults (age 18 years and older).

This guide provides a walk-through of the tool and highlights key functionalities.

Background/Summary

The E2P anxiety disorders and depression tool engages a modular approach format to assist primary care providers with capturing critical information during a mental health encounter. The tool helps to standardize documentation and supports clinical best practices by enabling clinicians to gather, document, and reference mental health metrics more efficiently at the point of care.

Anxiety disorders and depression diagnoses are based on a clinical assessment combined with appropriate testing that either supports or rules out their presence. There is no single test that confirms the presence of a mental health disorder. Formulating a diagnosis as soon as possible facilitates rapid symptom management and may help avoid hospitalization.

Purpose of the Tool

Our objective was to create an EMR-integrated tool that supports clinicians in the screening and management of mental health. The E2P anxiety disorders and depression tool for OSCAR Pro EMR supports a more comprehensive picture of the patient's mental health condition, treatment goals, and potential risk for suicide – thereby ensuring that a safety plan for the patient is created where appropriate.

Release Notes

This is version 1.1 of the tool. Find the summary of the release notes [here](#).

Using the Anxiety Disorders and Depression Tool in OSCAR Pro

Navigation Menu:

These modules are based on the core clinical functions of quality standards: Clinical Assessment, Medication, Management, and Patient Resources. Using this tool users can access up-to-date best evidence or access virtual and local supports for patient care. The components related to the provision of care for anxiety disorders and major depression have been broken into 4 modules, allowing for flexibility.

Assessment Management Plan Medication Patient Resources

Features:

- Standardize data inputs captured to improve decision support within the tool as well as provide a means for evaluation
- 11 of 12 quality statements for people with an anxiety disorder embedded within the tool
- 11 of 12 quality statements for people with depression embedded within the tool

Summary Tabs:



From the Summary, the user can simultaneously:

- Update the suspected mental health condition
- Enables the flexibility to support patient encounter needs while also keeping the visit portion of the tool open
- View/update metrics for PHQ-9 and GAD-7
- Filter graphing results for the previous assessments
- Review lab tests and values and launch the lab requisition form
- Complete the patient's full history of stress or trauma

Updating the Diagnosis

The tool documents 5 Mental Health conditions that may affect the patient, any one or more can be selected. The following are the conditions that can also include easy-to-use shortened questionnaires for patients suspected of having anxiety.

- Depression
- Anxiety
- Social Anxiety Disorder
- Panic Disorder
- Specific phobia or agoraphobia

Getting Started with the Anxiety Disorders and Depression Tool

The tool was designed to include decision-support throughout the tool and has implemented tooltips, hover-overs, and pop-up windows to also help inform quality standard information.

Blue text with a dotted underline – indicates [Panic disorder](#)
hover over text.

Blue “i” icons – indicate hover over text.



Blue text with a solid underline – indicates a
hyperlink that will open in a new window. [safety plan](#)

Bolded Purple text w/a solid underline –
indicates an expand/ collapsible section. [\(show details\)](#)
**Clicking this will open the section and
clicking it while the section is opened will
close it.**

White buttons with a Yellow Outline – indicate
a pop-up window.

**Clicking this will open the pop-up window
which will have a close button.**

Tapering medications

White buttons with a Blue Outline – indicate
a separate window for an Oscar built-in
service.

Open consultations

Patient Summary Dashboard

There are two distinct areas of the anxiety disorders & depression tool at the left we have our patient summary dashboard that includes metrics, lab results, history, and patient resources.

The patient summary dashboard can be referenced at any point during the visit to help inform clinical decision-making or support diagnosis. The main portion of the tool consists of the visit form.

Suspected mental health conditions

Please open a new instance of the form from a patient chart to see the contents of this section.

Select suspected disorder:

☐ Depression

☐ Anxiety

☐ Social anxiety disorder (Social Phobia Inventory (SPIN) scale)

☐ Panic disorder (Panic disorder severity scale (PDSS))

☐ Specific phobia or agoraphobia (Severity measure for Specific Phobia Scale)

Update Disease Registry

PHQ-9

open new form

Mild

5

Jun 11, 2024

graph

GAD-7

open new form

Moderately

11

May 22, 2024

graph

Recent lab values

Please open a new instance of the form from a patient chart to see the contents of this section.

Update manually

Change frequency

Open lab req

| Lab value | Result | Date | Goal | Frequency |
|------------|--------|------|------------|-----------|
| Hemoglobin | | | ≥115≤170 | 12 months |
| Hb A1C | | | ≤7 | 12 months |
| TSH | | | ≥0.34≤5.60 | 12 months |
| Ferritin | | | ≥11≤336 | 12 months |
| B-12 | | | ≥160≤950 | 12 months |

Comorbid physical health conditions

Consider testing and treating physical health symptoms for the following conditions while concurrently treating and monitoring mental health symptoms as appropriate.

☐ Anemia

☐ Nutrient deficiencies

☐ Diabetes

☐ Pregnant and postpartum

☐ Thyroid dysfunction

☐ Cardiovascular disease

☐ Neurological disorders

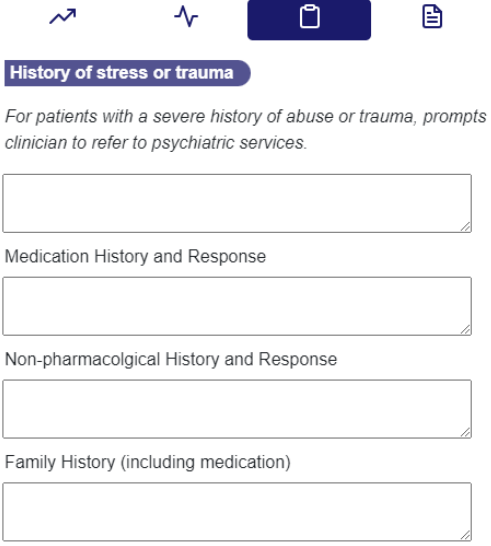
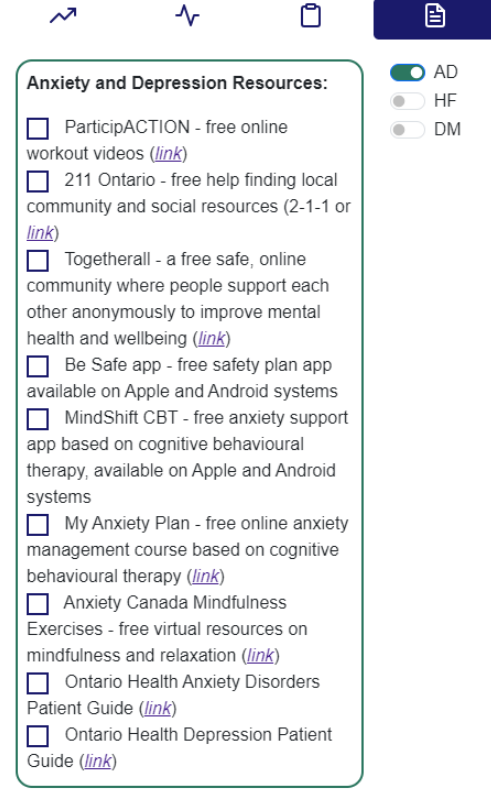
Additional notes...

Metrics Tab:

- Screening questions related to the associated anxiety disorders appear when the mouse hovers over
- The PHQ-9 and GAD-7 forms can be launched from the metrics section.
- The score, severity level, date, as well as graph will be updated once the forms have been completed.
- Ability to update the disease registry directly within the tool

Labs Tab:

- The Lab results can now be updated manually, they also feature a graphing functionality for each Lab Test, as well as the relevant target ranges/frequencies
- Provides the ability to open the lab requisition form directly from the tool.
- Monitoring for comorbid physical health conditions can be found in this tab

| | |
|--|--|
|  | <p>History Tab:</p> <ul style="list-style-type: none"> This section allows the user to document the patient's history of stress or trauma, medication, non-pharmacological treatment, and family history. The text areas that are embedded with form-memory will populate the next time the form is opened. |
|  | <p>Patient Resources Tab:</p> <ul style="list-style-type: none"> Pulls in the patient resources that were given and/or recommended for anxiety and depression Users also have the option to review the patient resources for heart failure and diabetes |

Launching Clinical Modules

The components related to the provision of care for anxiety disorders and depression have been broken into 4 modules, allowing for flexibility. By no means does this require all 4 modules to be completed during a visit but rather allows you to navigate to a module of your choosing that you would like to focus on during the patient encounter.

Assessment Module

In the assessment module, users can document what the patient is here to discuss, whether the visit with the patient is due to a chronic or recent episodic event, as well as the estimated symptom onset date.

The main elements of this module are the mental status examination, recent stressful or traumatic life events, suicide risk assessment, personal and psychosocial stressors & supports, lifestyle, social determinants of health, comorbid mental health conditions, and physical examination.

This module has form memory, which enables any text entered within the textboxes or checkboxes, and options selected from a previous visit will populate upon selecting the pull from the previous button. This allows users to add to existing notes or update the notes with any changes that occurred, therefore supporting a more comprehensive picture of the patient to be captured.

The screenshot displays the 'Assessment Module' interface. At the top, there's a navigation bar with tabs: 'Assessment' (selected), 'Management', 'Medication', and 'Patient Care Plan'. Below this, the 'Assessment Module' title is shown alongside 'copy from prior' and 'clear' buttons, and a 'last done' date of '2024-06-11'. A 'Select type' dropdown and 'Est. date of symptoms onset' field (with a date picker) are present. The main section is titled 'Patient here to discuss:' followed by a text area. Below this is a 'Since last visit, feels:' dropdown and a 'Document overall patient progress' text area. The 'Mental status examination' section includes a list of considerations (Affect/behaviour, Dress/groom, Speech, Perception, Thoughts, Insights) and a large text area. The 'Recent stressful or traumatic life events' section has a text area with a prompt to consider asking about work, school, divorce/breakups, bereavement, trauma, abuse, etc. The 'Suicide risk assessment' section features radio buttons for 'Low risk' and 'High risk', and a text area with instructions on what to consider when assessing risk. Below this is a link to the 'Columbia-Suicide Severity Rating Scale (C-SSRS)'. The 'Personal and psychosocial stressors & supports' section has a text area with a prompt to consider asking about family, friends, and community. The 'Lifestyle' section is partially visible at the bottom. On the right side, there are 'Submit' and 'Print' buttons.

Management Module

The management section offers the opportunity for clinicians to document that information has been provided to the patient about psychotherapy, lifestyle considerations, natural health products, and management of anxiety disorders and/or depression with the overall goal of improving patient engagement and enhancing their ability to make decisions about their care.

All checkboxes and text areas that are embedded with form-memory that will populate the next time the form is opened by clicking Copy from prior as well as populate the patient care plan with the management options that were selected.

Assessment
Management
Medication
Patient Care Plan

Management Module

copy from prior
clear

last done: 2024-06-11

Open consultations

Psychotherapy and medication contribute to improved outcomes. Management of depression should include psychotherapy and/or medication, with a combination of the two for severe or persistent symptoms. Management of anxiety disorders should include psychotherapy and/or medication and follow a stepped approach to ensure the least intensive and most effective management strategy is started first.

Engage the patient in shared decision-making about their management options and plan, taking into consideration:

- Results from the comprehensive assessment
- Symptom severity
- Previous response to management strategies
- Lifestyle considerations
- Needs and preferences
- Cost and health insurance coverage

☐ Patient referred out for management

Psychotherapy

Decide together whether psychotherapy should be used as monotherapy or as an adjunctive therapy. [Learn more](#)

Patient referred to **free psychotherapy options** ([show details](#))

☐ Ontario Structured Psychotherapy ([go to website](#))
☐ GP/FP psychotherapy ([go to website](#))

At cost options

☐ Psychologist
☐ Psychotherapist or social worker

Lifestyle considerations

Lifestyle considerations should be optimized for all patients.

Patient plan includes:

Evidence-based lifestyle considerations

☐ [Physical activity](#): First line monotherapy for mild to moderate depression, and second line adjunctive therapy for moderate to severe depression.
☐ [Light therapy](#): First line monotherapy for seasonal depression, and second line adjunctive or monotherapy therapy for moderate to severe depression.

Lifestyle considerations

☐ [Sleep hygiene](#)
☐ [Nutrition](#)

Submit
Print

Medication Module

The purpose of the medication module is to create and document medication management plans based on the latest best practice guidelines for anxiety disorders and major depression, which in turn also populate the patient care plan with the most recent updates to their medication plan using the dynamic table available in this module.

The four elements of this plan are monitoring adherence, and response, as well as adjusting medications, all while emphasizing the focus on considering patient and medication factors when initiating treatment throughout the tool. We've included Dropdown medication lists that can be used to select the name-specific medication you wish to prescribe. Additionally, dropdowns and text boxes for the quantity and direction make it easy for documentation purposes.

*This module is strictly for planning and documentation purposes and prescribing medications will still need to follow the usual workflow in Oscar by opening the built-in medications window.

Medication Module copy from prior clear last done: 2024-06-11

Engage the patient in shared decision-making about their medications, taking into consideration: [patient factors & medication factors](#)

Set realistic expectations when initiating treatment

"People who stick to their treatment plan are the ones who see the most improvement over time. So, we are going to work together to make sure that happens."

"Side effects are normal and should wear off by 4-6 weeks. If you feel worried about this, we can chat about it some more."

Monitoring, adherence and response

Current Medications:

Taking medication(s) as directed:

Is the medication helping? ☐ Yes ☐ No

Side effects ☐ Yes ☐ No

Severity of side effects:

For information on side effect management see [CEP's Anxiety Disorders and Depression tool](#)

Indicators of suicide risk ☐ Yes ☐ No

☐ Discussed [safety plan](#)

Additional notes:

Follow up with patient to ensure they have timely access to the agreed upon medications

Follow-up appointment booked for:

Medication plan Initial onset, effect and duration Medication after remission

Fluoxetine

+ Add medication

| Medication | Dose | Direction | Date |
|------------|------|----------------|--------------|
| Fluoxetine | 2 mg | Increased dose | Jun 11, 2024 |

Adjusting medication Tapering medications Switching medications Switching monotherapy vs. adding adjunctive medication

Patient Resources Module

The Patient Care plan module tab will launch consolidated care plan for all E2P tools. The purpose of the top section is intended to document the patient's care team, gather consent, determine patient goals, plan the purpose of the appointment, and review lifestyle changes & therapies, treatments and allergies, medications, and plan follow-up and next steps.

E2P Patient Care plan

copy from prior clear last done: 2024-06-11

Patient name: TEST, ARCHER Date of birth: 11/01/1991 (d/m/y)

Care team & care consent

Care team

Coordinating lead (notify if patient is hospitalized) Name: Contact:

| Name | Role | Organization / Address | Contact |
|------|------|------------------------|---------|
| | | | |

Add

Health care consent and advance care planning

Support Decision Maker

Name Relationship Phone

☐ I have shared my wishes, values, beliefs with my future SDM as it relates to my future health care

Update substitute decision maker information

Name Relationship Phone Alternate Contact

Goals

Add Submit Print

The patient resources section contains a collection of curated resources related to heart failure, diabetes, and anxiety and depression for the patient and their caregivers. Clicking on the purple link will open the resource. Selecting the checkbox will document which resources were given to the patient during this visit.

At the bottom of this page, features the option to complete the palliative approach to care plan.

Resources

Heart Failure related resources: [show all resources](#) [hide unchecked resources](#)

Diabetes related resources: [show all resources](#) [hide unchecked resources](#)

Anxiety and Depression related resources: [show all resources](#) [hide unchecked resources](#)

☐ ParticipACTION - free online workout videos - <https://www.youtube.com/@participaction>

☐ 211 Ontario - free help finding local community and social resources - 211 or <https://link.cep.health/e2pmho15>

☐ Togetherall - a free safe, online community where people support each other anonymously to improve mental health and wellbeing - <https://link.cep.health/e2pmho16>

☐ Be Safe app - free safety plan app available on Apple and Android systems

☐ MindShift CBT - free anxiety support app based on cognitive behavioural therapy, available on Apple and Android systems

☐ My Anxiety Plan - free online anxiety management course based on cognitive behavioural therapy - <https://link.cep.health/e2pmho18>

☐ Anxiety Canada Mindfulness Exercises - free virtual resources on mindfulness and relaxation - <https://link.cep.health/e2pmho19>

☐ Ontario Health Anxiety Disorders Patient Guide - <https://link.cep.health/e2pmho20>

☐ Ontario Health Depression Patient Guide - <https://link.cep.health/e2pmho21>

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:



Overview of Usage Analytics

Please visit our website to review our [overview of usage analytics](#).

E2P brings together multi-disciplinary, cross-sector expertise under the joint leadership of the [Centre for Effective Practice](#), [Amplify Care](#), 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.