

**Updated: April 2025\***

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](mailto:EMRtools@amplifycare.com) and we will be happy to help!

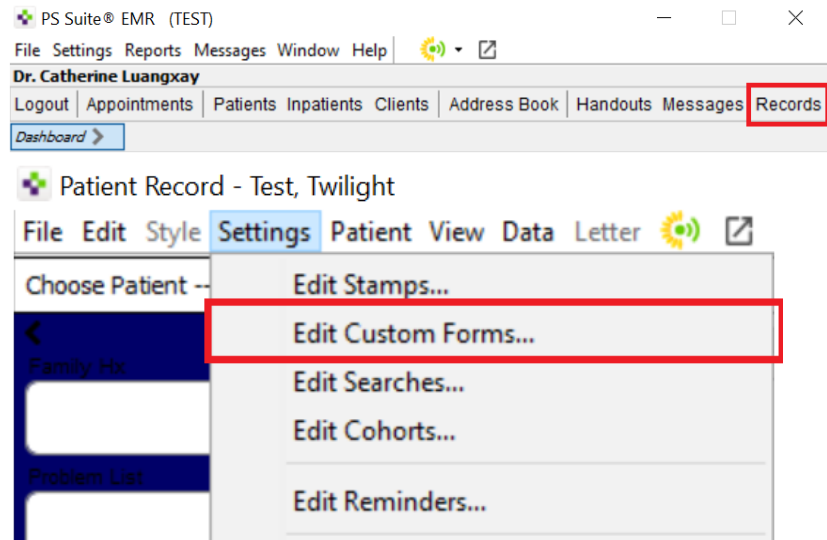
## Installation Guide: Table of Contents

A. Import the Custom Forms.....	2
Optional Toolbar Customization .....	3
B. Import Flowsheet.....	4
C. Set Up Reminders.....	5
D. New Tool Version Process.....	7
Heart Failure Management Tool – Version 3.0 Update .....	7
A. Tool Feedback .....	12
B. Overview of Usage Analytics .....	12
C. Known Issues/Errors .....	12

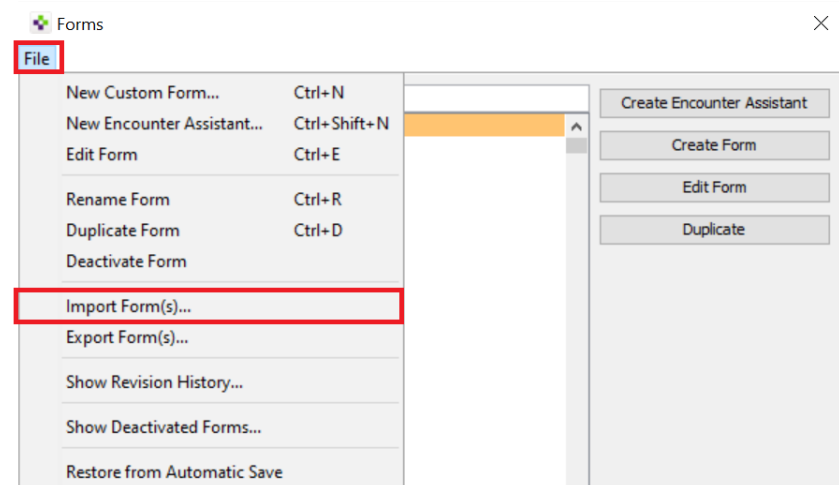
## **Evidence2Practice Ontario (E2P) Tool Installation Guide**

### **A. Import the Custom Forms**

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



2. In the **Forms** window, from the **File** menu, choose **Import Form(s)**.



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.

## Optional Toolbar Customization

By default, the tools open as 'pop-up' windows. Selecting and saving this checkbox will default the launching of tools directly into the progress notes section.

1. Navigate to **Settings** and select **Edit Custom Forms**

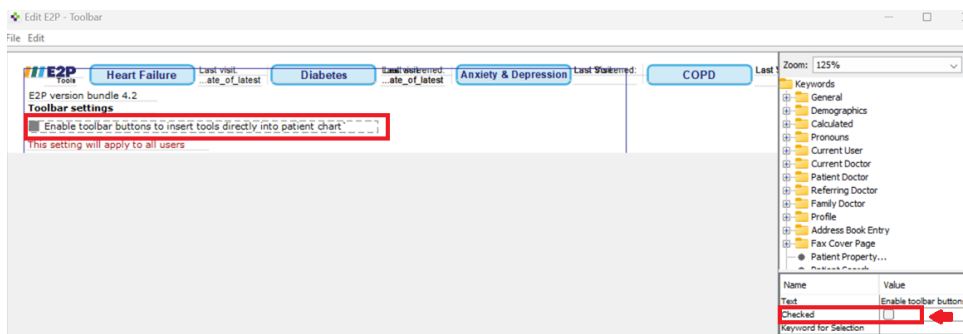
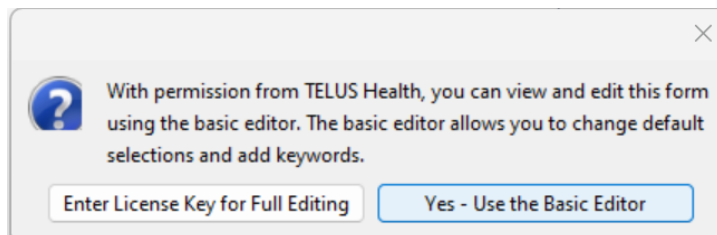
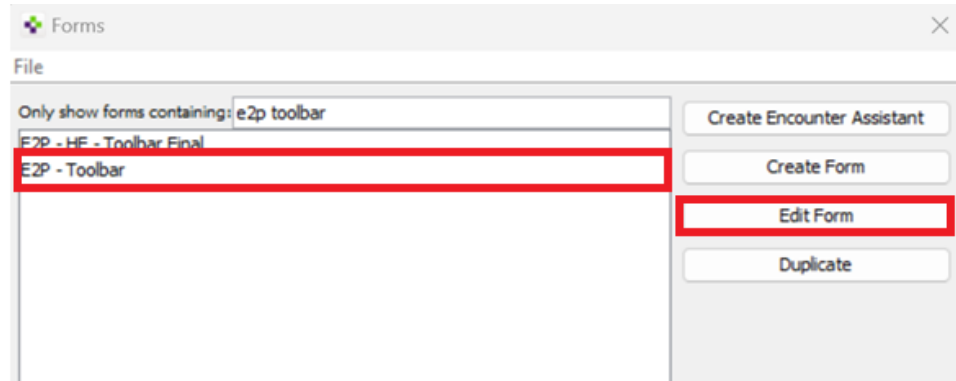
2. In the search bar, type in **"E2P"**.

Search for the form titled:  
**"E2P – Toolbar"**  
Click **"Edit Form"**.

In the pop-up window, choose Basic Editor.

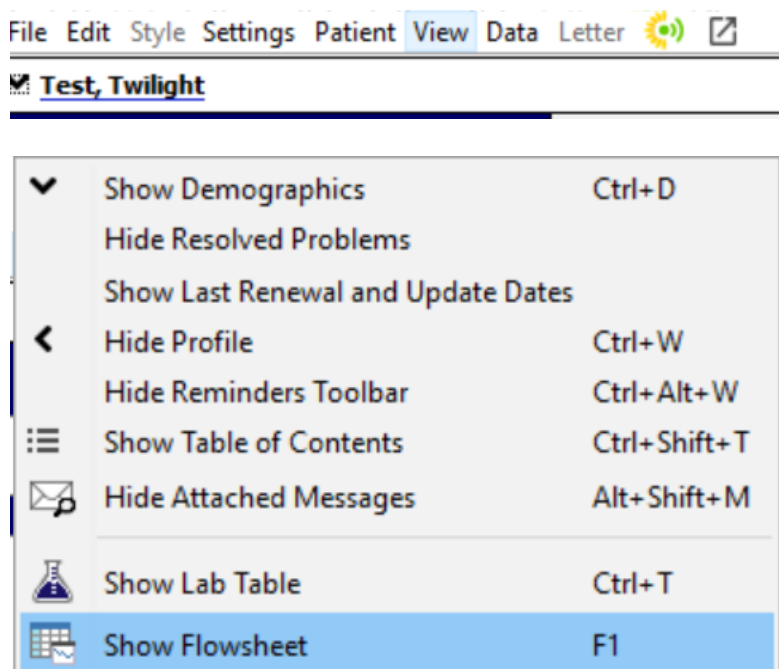
Select the box  
"Enable toolbar buttons to insert tools directly into patient chart"

Click "Checked" in the box on the right.

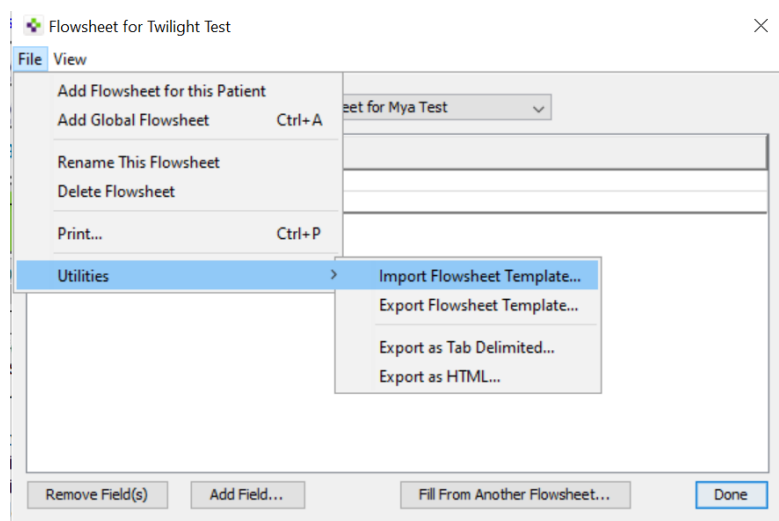


## B. Import Flowsheet

6. In PS Suite EMR, from the **Records** window, choose **View > Show Flowsheet**.



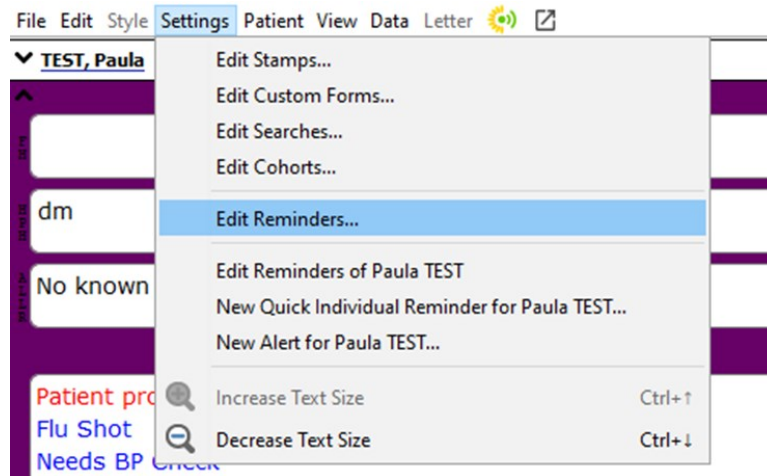
7. Click **File > Utilities > Import Flowsheet Template**.



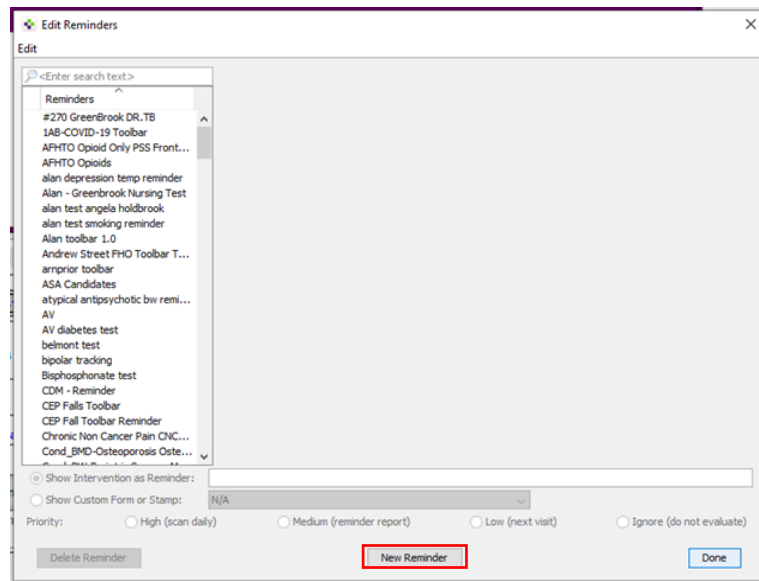
8. Navigate to your **computer's desktop** and double-click the folder that contains the flowsheet files.
9. Click the **flowsheet(s)** in the list that you want to import. The flowsheets will be **".flowsheet"** files.
10. Click the **Choose** button. The import may take 30 seconds or more. A message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

## C. Set Up Reminders

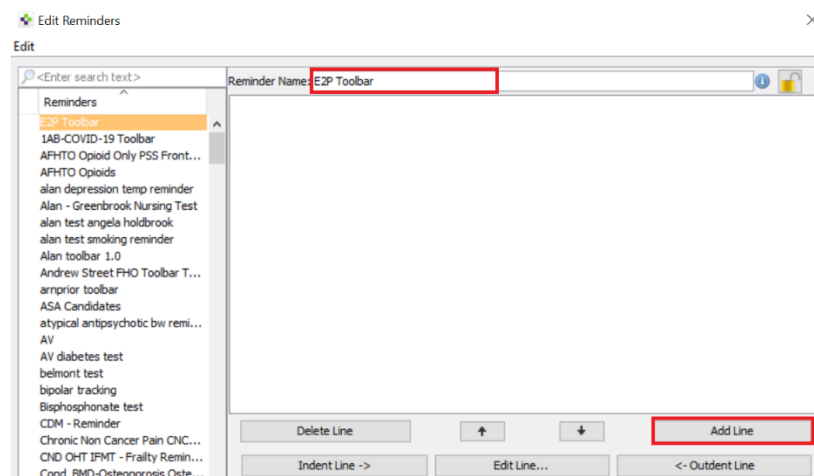
- In PS Suite EMR, from the **Records** window, choose **Settings > Edit Reminders**.



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



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



14. Click **Other** >  
**Current User**  
**Initials** >  
**contains** >  
enter PSS  
initials.

**Add Search Criterion**

Demographics	Current Doctor Initials	contains	AAV
Patient Profile	Current User's Role	contains the word	
Visits	Current User Initials	does not contain the word	
Vitals	Today's Date	does not contain	
Immunizations		is	
Treatment		is not	
Allergies		is empty	
CPP Problems		is not empty	
CPP Past Medical History		starts with	
CPP Family History		ends with	
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			
<b>Other</b>			
Restrictions			
Nested Reminder			
Scoring			

15. Click **Show**  
**Custom Form**  
**or Stamps** and  
select  
**"E2P –**  
**Toolbar"**. Then  
click **Done** to  
save your  
work.

**Edit Reminders**

Reminder Name: E2P - Toolbar

Current User Initials contains CL

Comments:

☐ Show Intervention as Reminder:  
☒ Show Custom Form or Stamp: E2P - Toolbar

Priority: ☐ High (scan daily) ☒ Medium (reminder report) ☐ Low (next visit) ☐ Ignore (do not evaluate)

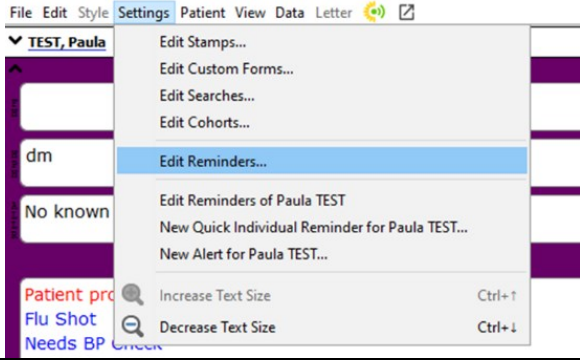
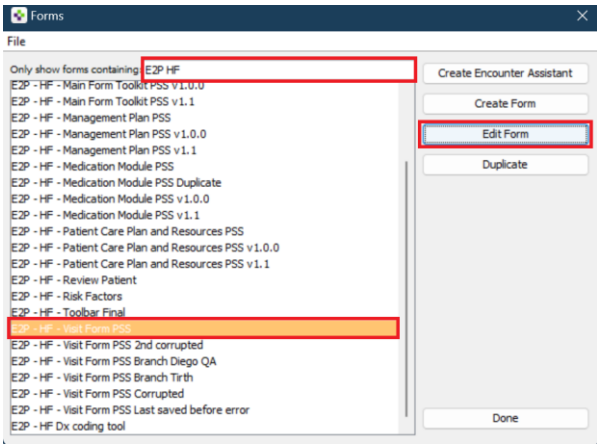
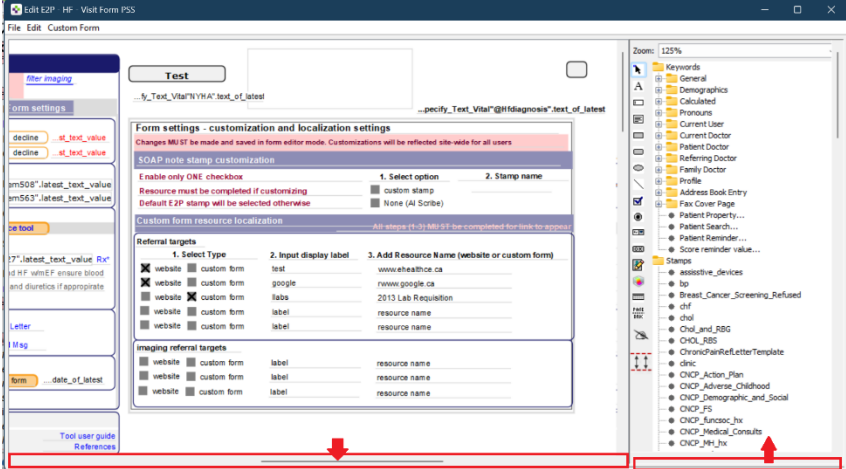
Delete Reminder Cancel Add Done

## D. New Tool Version Process

After you have downloaded the updated tool package, follow these steps to [import the tool into the EMR](#).

### Heart Failure Management Tool – Version 3.0 Update

Before using the updated Heart Failure Management Tool, you must complete the form customizations and localization settings for certain features to work.

<p>1. Navigate to <b>Settings</b> and select <b>Edit Custom Forms</b></p>	
<p>2. In the search bar, type in <b>"E2P HF"</b>.</p> <p>Search for the form titled: <b>"E2P – HF – Visit Form PSS"</b> Click <b>"Edit Form"</b>.</p> <p>In the pop-up window, choose Basic Editor.</p>	
<p>3. Drag the button scroll bar to the center to reveal the "form settings – customization and localization setting" window.</p> <p>Please ensure to pull the bottom right up to reveal the editor settings.</p>	

**To customize the SOAP note stamp to a different stamp follow these instructions.**  
If you would like to use the default stamp developed by E2P, please skip this step.

1. Click on the **custom stamp** box.

In the window on the right, scroll down to the line for "Checked".

Then click on the box next to it to check it off.

2. Stamp name

- Click on the corresponding **blank** box.

On the **top right half** of the window:

- Scroll down to the **Stamps list** and search for the stamp you would like to embed.

Then on the **bottom right half** of the window:

- Scroll down to the line for **"Text"**.
- Then enter the **name** of the stamp you wish to add.

If you are using AI Scribe, you may wish to disable the stamp functionality.

Click on the box for  
**None (AI Scribe)**

In the window on the right, scroll down to the line for "Checked".

Then click on the box next to it to check it off.

**Form settings - customization and localization settings**  
Changes MUST be made and saved in form editor mode. Customizations will be reflected site-wide for all users

**SOAP note stamp customization**

Enable only ONE checkbox  
Resource must be completed if customizing  
Default E2P stamp will be selected otherwise

1. Select option  
☒ custom stamp  
☐ None (AI Scribe)

2. Stamp name

**Custom form resource localization**  
All steps (1-3) MUST be completed for link to appear

**Referral targets**

1. Select Type	2. Input display label	3. Add Resource Name (website or custom form)
<input checked="" type="checkbox"/> website	test	www.ehealthoc.ca
<input type="checkbox"/> website	custom form	google
<input type="checkbox"/> website	custom form	ilabs
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	resource name
<input type="checkbox"/> website	custom form	resource name

**Imaging referral targets**

1. Select Type	2. Input display label	3. Add Resource Name (website or custom form)
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	resource name
<input type="checkbox"/> website	custom form	resource name
<input type="checkbox"/> website	custom form	resource name

**Name**      **Value**

Show Edit Text Border ☒

Include In Printout ☒

Compact Stamp Text ☒

Graph As

Graph Date Field Id

Resource Name

Tab Order 0

Radio Button ☐

**Checked** ☒ ←

Keyword for Selection

Event Triggered undoUserEditInLaunchMode

Custom Height 9

### To customize the form resources, follow these instructions.

To set a **website referral** or **Imaging referral** targets, follow these steps:

1. Select Type:

Click on the box for **website**.

- In the window on the right, scroll down to the line for "Checked".
- Then **click on the box** next to it to check it off.

**Form settings - customization and localization settings**  
Changes MUST be made and saved in form editor mode. Customizations will be reflected site-wide for all users

**SOAP note stamp customization**

Enable only ONE checkbox  
Resource must be completed if customizing  
Default E2P stamp will be selected otherwise

1. Select option  
☐ custom stamp  
☐ None (AI Scribe)

2. Stamp name

**Custom form resource localization**  
All steps (1-3) MUST be completed for link to appear

**Referral targets**

1. Select Type	2. Input display label	3. Add Resource Name (website or custom form)
<input checked="" type="checkbox"/> website	label	resource name
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	label

**Imaging referral targets**

1. Select Type	2. Input display label	3. Add Resource Name (website or custom form)
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	resource name
<input type="checkbox"/> website	custom form	resource name
<input type="checkbox"/> website	custom form	resource name

**Name**      **Value**

Event Handlers

Section ID settings

Text website

Font Name Helvetica

Size 9

Style plain

Width 100

Required ☐

Show Edit Text Border ☒

Include In Printout ☒

Compact Stamp Text ☒

Graph As

Graph Date Field Id

Resource Name 1

Tab Order 0

Radio Button ☐

**Checked** ☒ ←

Keyword for Selection

Event Triggered undoUserEditInLaunchMode

Custom Height 0

Provide Reason Name

2. Input display label

- Click on the **label** box.

In the window on the right, scroll down to the line for "Text".

- Then enter a **name** for the referral you wish to add.

**Form settings - customization and localization settings**  
Changes MUST be made and saved in form editor mode. Customizations will be reflected site-wide for all users

**SOAP note stamp customization**

Enable only ONE checkbox  
Resource must be completed if customizing  
Default E2P stamp will be selected otherwise

1. Select option  
☐ custom stamp  
☐ None (AI Scribe)

2. Stamp name

**Custom form resource localization**  
All steps (1-3) MUST be completed for link to appear

**Referral targets**

1. Select Type	2. Input display label	3. Add Resource Name (website or custom form)
<input checked="" type="checkbox"/> website	label	resource name
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	label

**Imaging referral targets**

1. Select Type	2. Input display label	3. Add Resource Name (website or custom form)
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	label
<input type="checkbox"/> website	custom form	resource name
<input type="checkbox"/> website	custom form	resource name
<input type="checkbox"/> website	custom form	resource name

**Name**      **Value**

Item Type text

Item Id Item-488

Name CustomDisplayLabel

Y 1193

X 253

Colour black

Visible ☐

Opaque ☐

Event Handlers

Section ID settings

Text **Diagnostic Regimen** ←

Font Name Helvetica

Size 9

Style plain

Width 100

Required ☐

Show Edit Text Border ☒

Include In Printout ☒

Compact Stamp Text ☒

Graph As

Graph Date Field Id

Resource Name

Tab Order 0

Editable ☐

Justification left

3. Add Resource Name (website or custom form)

- Click on the **resource name** box.

In the window on the right, scroll down to the line for **"Text"**.

- Then enter the **link** for the referral you wish to add.

To set a **custom form referral** target follow these steps:

1. Select Type: Click on the box for **custom form**.

- In the window on the right, scroll down to the line for **"Checked"**.
- Then **click on the box** next to it to check it off.

2. Input display label

- Click on the **label** box.

In the window on the right, scroll down to the line for **"Text"**.

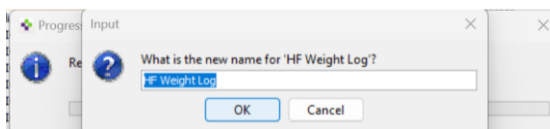
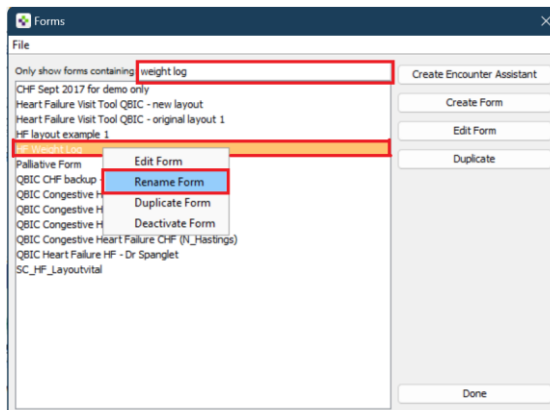
- Then enter a **name** for the referral you wish to add.

3. Find the form name:

Go to the forms search bar, **select the custom form, right-click**, and choose **"Rename Form."**

**Copy (Ctrl +C)** the form name. Then click **cancel** to close the window.

Navigate back to the HF Tool form settings window.



3. Add Resource Name

Click on the **resource name** box.

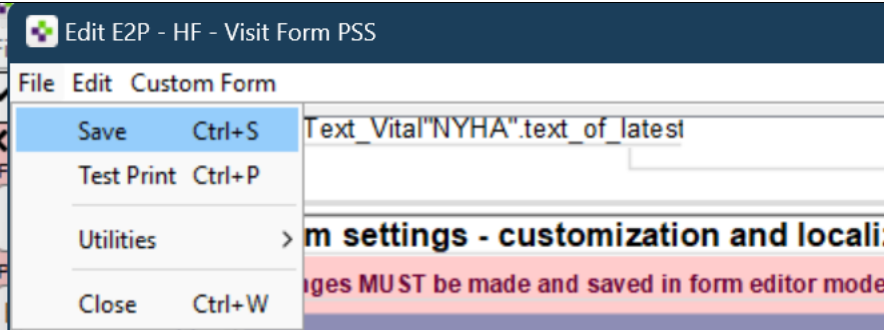
In the window on the right, scroll down to the line for **"Text"**.

**Paste (CTRL +V)** the **name** of the referral you wish to add.

1. Select Type	2. Input display label	3. Add Resource Name (website or custom form)
<input checked="" type="checkbox"/> website	test	www.ehealthca.ca
<input checked="" type="checkbox"/> website	google	www.google.ca
<input checked="" type="checkbox"/> website	Weight log	HF Weight log
<input checked="" type="checkbox"/> website	label	HF Weight log
<input checked="" type="checkbox"/> website	label	resource name

Navigate to the top left corner to save your work!

Or use your keyboard **CTRL +S** to Save.



## A. Tool Feedback

We would love to hear your feedback! Users are welcome to share their thoughts and opinions regarding the tool. We've also included the ability to share your feedback anonymously or you can also include your email address if you would like to be contacted in the future.

\*Links can be found at the footer of the screening & visit tools next to the usage analytics link

## B. Overview of Usage Analytics

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

## C. Known Issues/Errors

### 1. Rendering custom form issues:

**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. Open each E2P form and if this issue is seen, close the window and re-open. Please note that this will only happen once, you will not encounter this for each patient.

The screenshot shows a patient form titled "Lifestyle and self-management". It includes sections for "Diabetes management", "Smoking status", "Sick day management", "Driving guidelines", and "Glucose self-monitoring". Each section has checkboxes for various actions and input fields for dates and times. The form is partially obscured by a window titled "Resources and care plan".

### 2. Tool Installation Troubleshooting:

**Problem:** Some users have experienced an error message during installation resulting in a cancelled installation with no forms being imported. This is most often seen when importing the "E2P – MH – Anxiety Disorders and Depression Visit Tool". We believe this may occur due to the EMRs temporary files folder being full, the file size of the forms, and the long file path of forms.

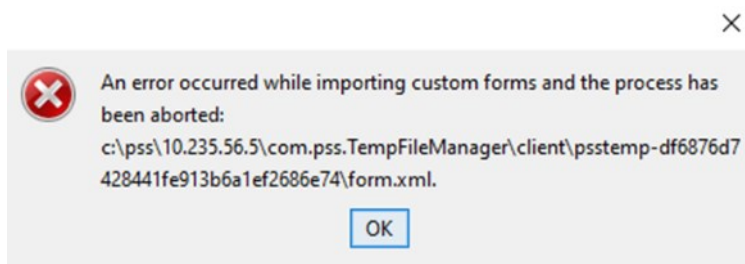
#### Troubleshooting:

1. Try importing forms in smaller batches (5 or less has been found to be helpful)

2. Do not import the largest files together or import the largest files individually (i.e. separate the installation of the Inlow's and 'E2P – MH – Anxiety Disorders and Depression Visit Tool').
3. Logging out and back in of the EMR can sometimes help clear the temp folder and fix installation
4. Try placing the folder temporarily on your desktop before installing to reduce the file path.

If you are still unable to import the form and would like support, contact us at [EMRtools@amplifycare.ca](mailto:EMRtools@amplifycare.ca).

Please take a screenshot of the error message so that we can best assist you.



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.