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.

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!

Table of Contents

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.
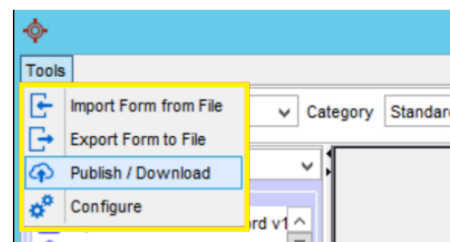
Downloading the E2P Tool

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

From the Accuro EMR, click on the Accuro target menu icon.

Select **Tools** followed by **Form Editor** to launch the form editor window.
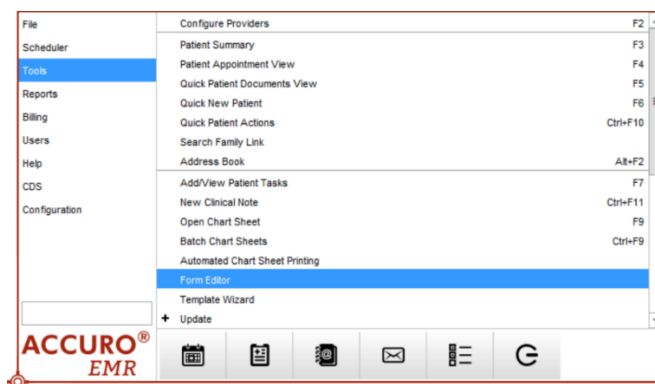
Within the Form Editor, click the top left **Tools** button and select the **Publish/Download** option.

The Form Publisher window will open. To find the tool:
1. In **Red**, you enter "**E2P**" into the search bar, then click on the magnifying glass.
   a. You will see the complete list of the E2P tools.
2. Select "**E2P – DM – Diabetes Tool"** in the list, shown in **Green**.

3. Then, click **Download** to import it into your Accuro EMR, shown in **Orange**.
4. Repeat steps for the 2 remaining tools:
   a. E2P – DM – Care Plan
   b. E2P – DM – Patient Resources

Step 1: Configuring the Lab Results

1. Navigate to the EMR menu option then select **Encounter notes.**
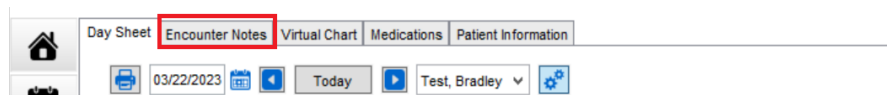
2. Select a test patient, which will reveal the notes, standard forms, and the lab section where the normal labs are listed.
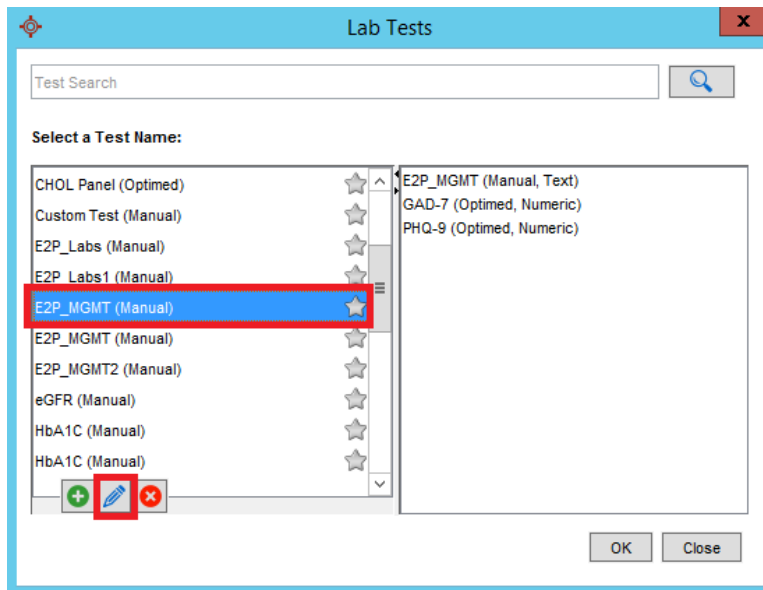
a) Add to Existing Lab Tests

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.**
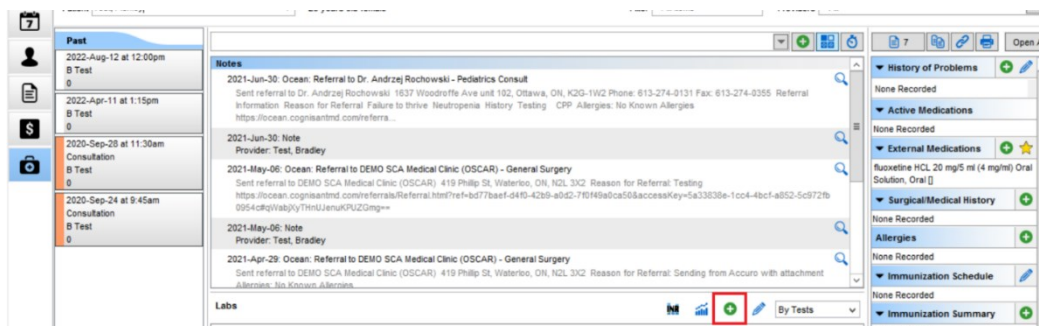
2. Search for "E2P_MGMT" in the lab tests list on the left.

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 Diabetes Management Tool:

Lab Test: E2P_MGMT	
Lab Value Name	Result Criteria
E2P_DM	Source: **Manual** Data Type: **Text**
E2P_DM_PR	Source: **Manual** Data Type: **Text**
Inlows_Score	Source: **Manual** Data Type: **Text**
GAD-7*	Source: **Optimed** Data type: **Numeric** Units: **Score**
PHQ-9*	Source: **Optimed** Data type: **Numeric** Units: **Score**
* = May already exist in the E2P_MGMT lab test. If this is the case <u>do not</u> add it again.	

To add the remaining lab values:

5. Click the **green plus sign** to add the Lab Value.
   a. Click New and title it "E2P_AD".
   b. The Edit the Result window should open, enter the details from the table above.
   c. Then click **"OK".**
   d. Select the "E2P_AD" line and click "OK".

6. Repeat step #6 for E2P_DM_PR and Inlows_Score.
7. Click the **green plus sign** to add the Lab Value.
   a. Search for "GAD-7" or "GAD7" and click the magnifying glass to search.
   b. Review the Results in the Result Criteria Table above.
      i. If there is a match, select the line and click **"OK"** to add it to the lab test.
      ii. If there is no match, skip to this step to create it.
8. Repeat step #7 for PHQ-9 and add it to Lab Test: E2P_MGMT.
9. 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.

1. To manage Lab Tests, click on the **green plus button** (*Lab Test in Accuro represents a Group of Test Results).
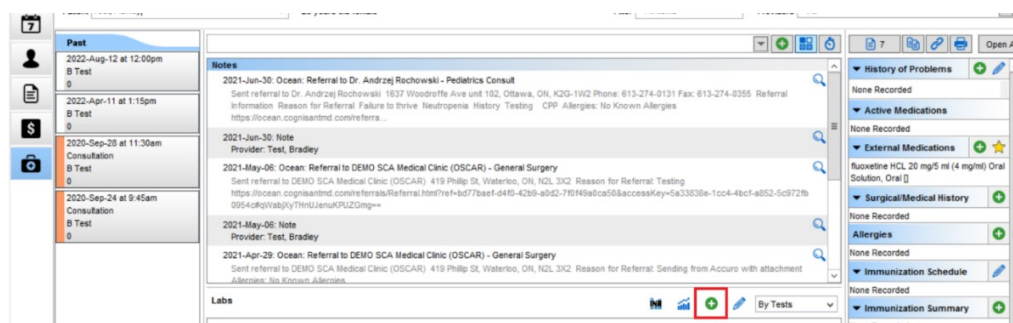
Lab Test: E2P_MGMT

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**.
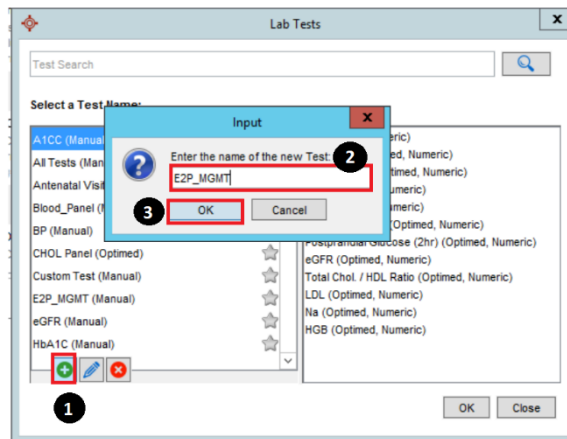
This should open the Edit Lab Test Window.

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

Lab Value: E2P_DM
From here click **New**
Title: "**E2P_DM**".

(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"**

Click on the **E2P_DM** result line and click **OK** to add it to the Lab Test.
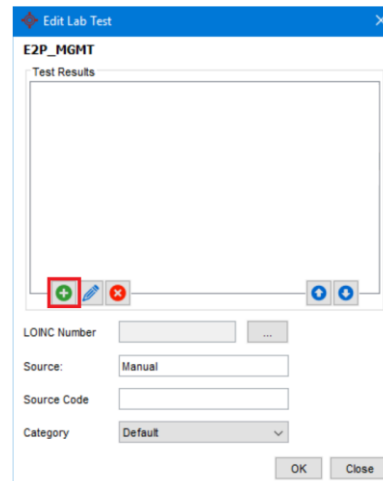
Lab Value: Inlows_Score

Then click the **green plus sign** to add another Lab Value.

From here click **New** then in the Input window enter the name of the new result: "**Inlows_Score**".

Then click "**OK**".

(This will capture the value of the Inlows foot exam score.)

The edit the Result window will open.

Enter the following:
- Source: **Manual**
- Data Type: **Text**

Then click **"OK"**

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

Lab Value: E2P_DM_PR

Then click the **green plus sign** to add another Lab Value.

From here click **New** then in the Input window enter the name of the new result: "**E2P_DM_PR**".

Then click "**OK**".

(This will capture the date of completion, so the form can pull the most recent date the patient resources module was completed.)

The edit the Result window will open. Enter the following:
- Source: **Manual**
- Data Type: **Text**

Then click **"OK"**

Then **Click** on the **E2P_DM_PR** result line and click **OK** to add it to the Lab Test.

Lab Value: GAD-7

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

From here click **New** then in the Input window enter the name of the new result: "**GAD-7**".

Then click "**OK**".

Edit the Result window will open.
Enter the following:
- Source: **Optimed**
- Data Type: **Numeric**
- Units: **Score**

Then click **"OK"**

Then **Click** on the **GAD-7** result line and click **OK** to add it to the Lab Test.

Lab Value: PHQ-9

If it does not already exist, Click the **green plus sign** to add the Lab Value.

From here click **New** then in the Input window enter the name of the new result: "**PHQ-9**".
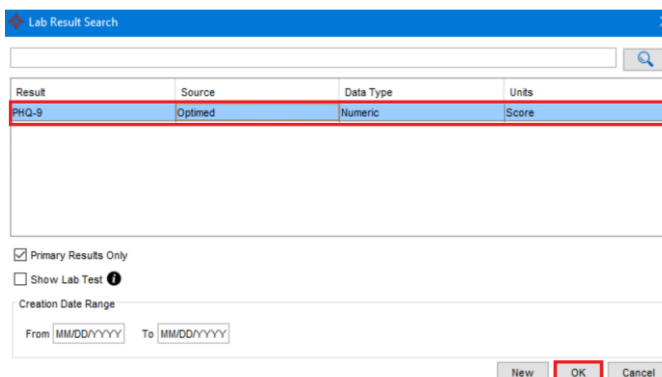
Then click "**OK**".

Edit the Result window will open.
Enter the following:
- Source: **Optimed**
- Data Type: **Numeric**
- Units: **Score**

Then click **"OK"**.

Click on the **PHQ-9**
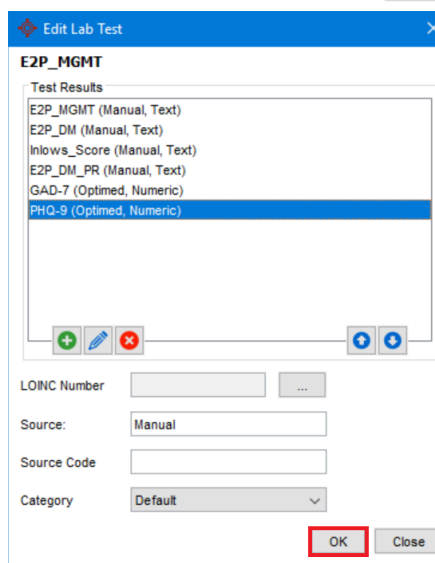result line and click **OK**
to add it to the Lab Test.

Then click **"OK"** to save
your work.
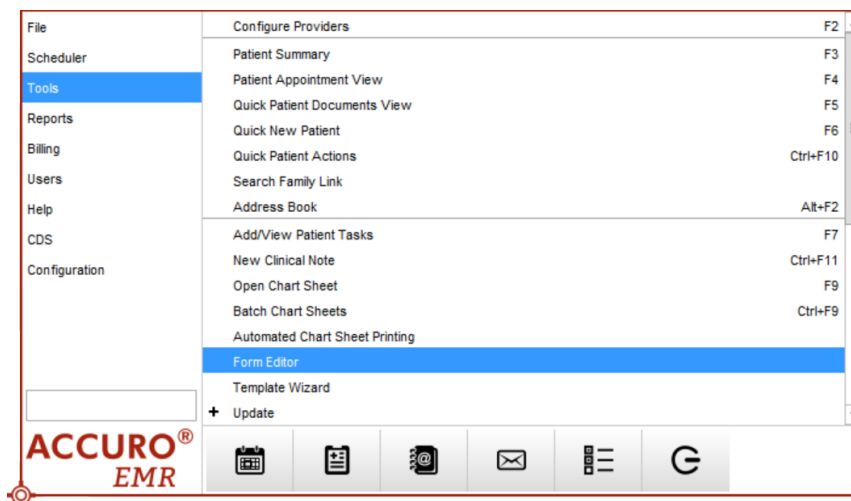
Step 2: Mapping Form Elements

1. E2P – DM- Diabetes Tool

Choose **Tools** then
Form Editor.

Look for the
E2P – **DM- Diabetes Tool** in the **Standard Forms list**.

Click on the tool name line to select the tool.

Stay on Page 1: Assessment Module.
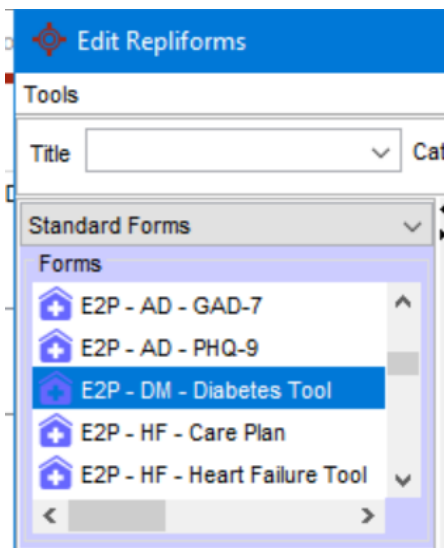
Once the tool appears, select **Last Completed:** Right-click and select **Edit**.
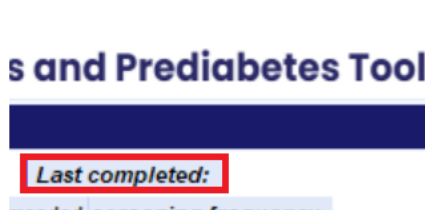
Select **Query**

Click Lab Test and select "**E2P_MGMT**".

Click Lab Result and select "**E2P_DM (Manual, Text)"**.

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

Beside Inlows foot exam, select **Score:** Then right-click and select **Edit**.
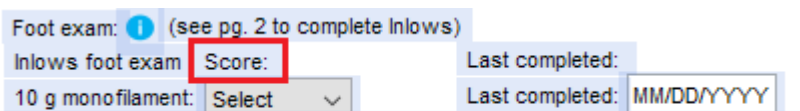
The Component Editor window will open.

Select **Query**
Click Lab Test and select "**E2P_MGMT**".

Click Lab Result and select "**Inlows_Score (Manual, Text)**".

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

Beside Inlows foot exam score, select **Last completed:**
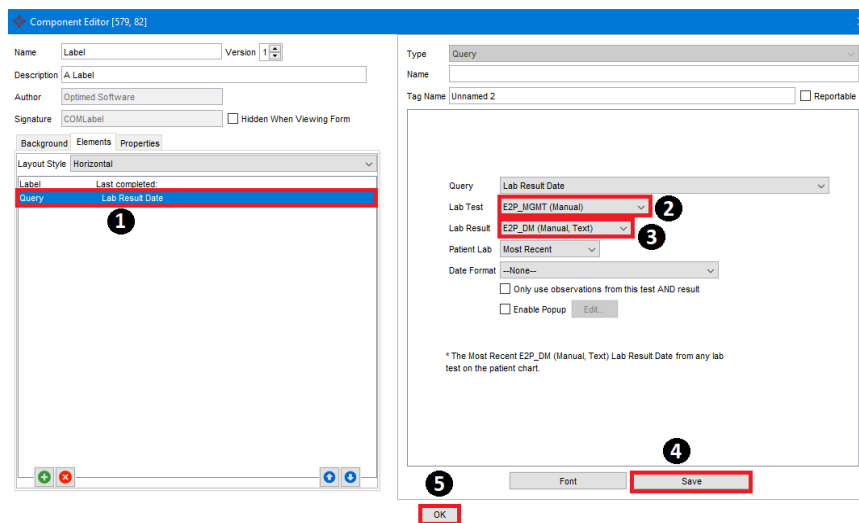
Then right-click and select **Edit**.

The Component Editor window will open.

Select **Query**.

Click Lab Test and select "**E2P_MGMT**".

Click Lab Result and select "**Inlows_Score (Manual, Text)**".

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

Select: **PHQ-9: Latest score**.
Then right-click and select **Edit**.
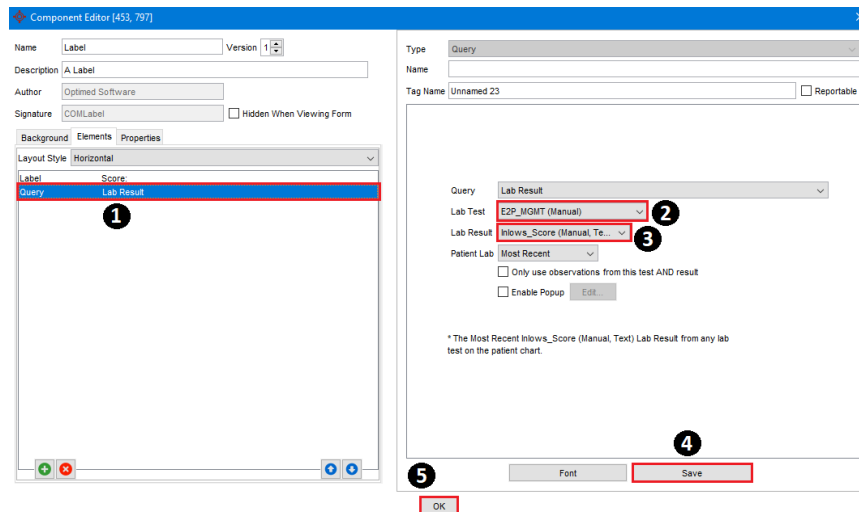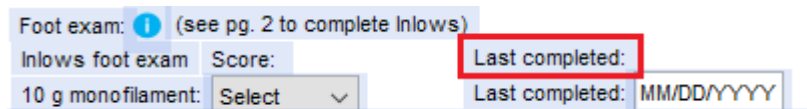
The Component Editor window will open.

Select **Query**.

Click Lab Test and select "**E2P_MGMT**".

Click Lab Result and select "**PHQ-9 (Optimed, Numeric)**".

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

Beside PHQ-9: Latest score, select: **Last completed:**

Then right-click and select **Edit**.

The Component Editor window will open.

Select **Query**

Click Lab Test and select "**E2P_MGMT**".

Click Lab Result and select "**PHQ-9 (Optimed, Numeric)**".

Click **Save** and **OK**.
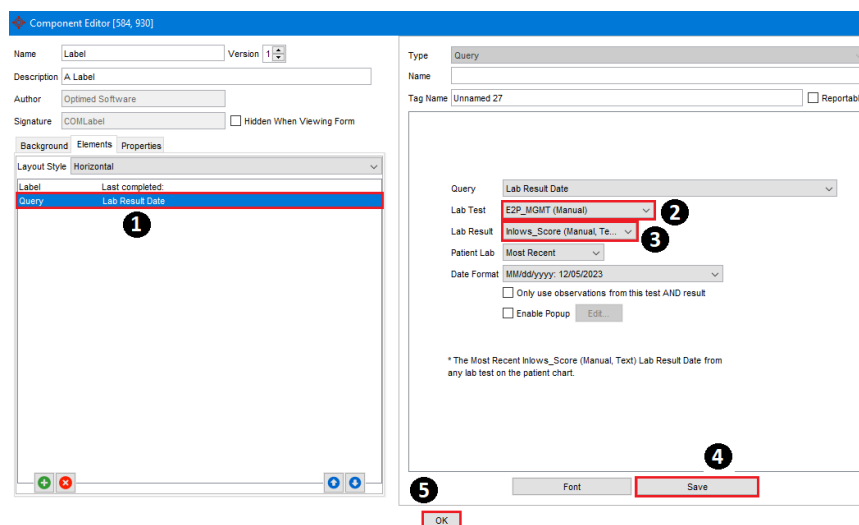
Select: **GAD-7: Latest score**

Then right-click and select **Edit**.

The Component Editor window will open.

Select **Query**.

Click Lab Test and select "**E2P_MGMT**".

Click Lab Result and select "**GAD-7 (Optimed, Numeric)**".

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

Beside GAD-7 Latest score, select: **Last completed:**
Then right-click and select **Edit**.

The Component Editor window will open.

Select **Query**.

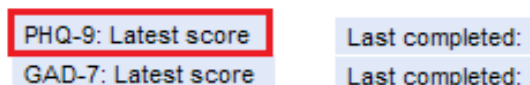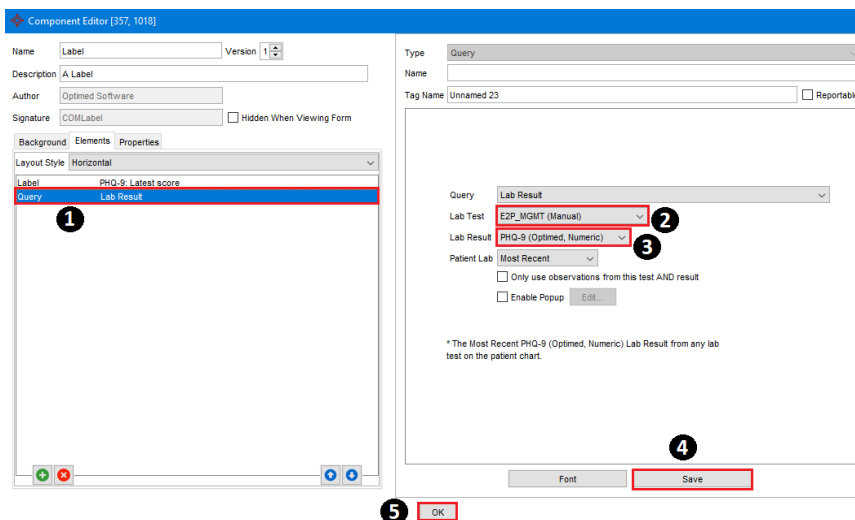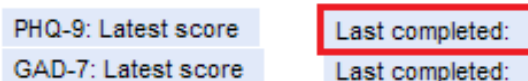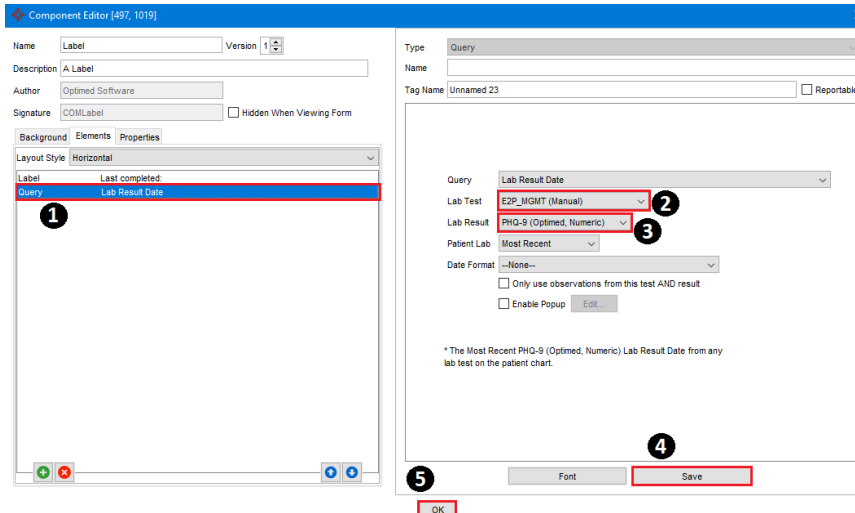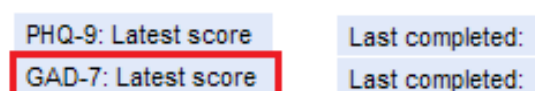Click Lab Test and select "**E2P_MGMT**".

Click Lab Result and select "**GAD-7 (Optimed, Numeric)**".

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

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_DM (Manual, Text)**".

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

Go to page 3.

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

The Component Editor window will open.

Click Lab Test and select "**E2P_MGMT**".

Click Lab Result and select "**Inlows_Score (Manual, Text)**".

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

Go to page 4: Management and Medication.

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

| Assessment | Management and Medication | Patient Resources | P |

Last completed:

The Component Editor window will open.

Click Lab Test and select "**E2P_MGMT**".

Click Lab Result and select "**Inlows_Score (Manual, Text)**".

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

Go to page 5: Patient Resources.

| Patient Resources | Patient Care Plan |

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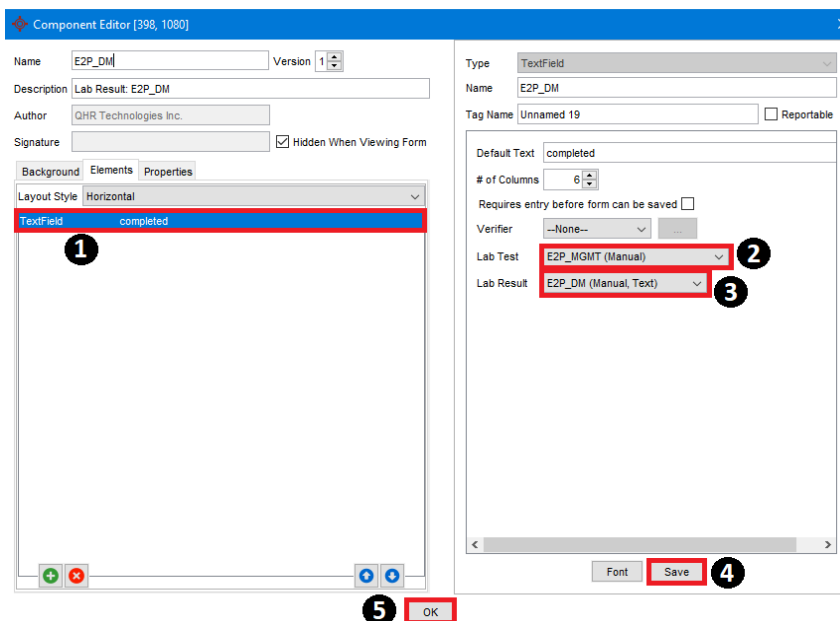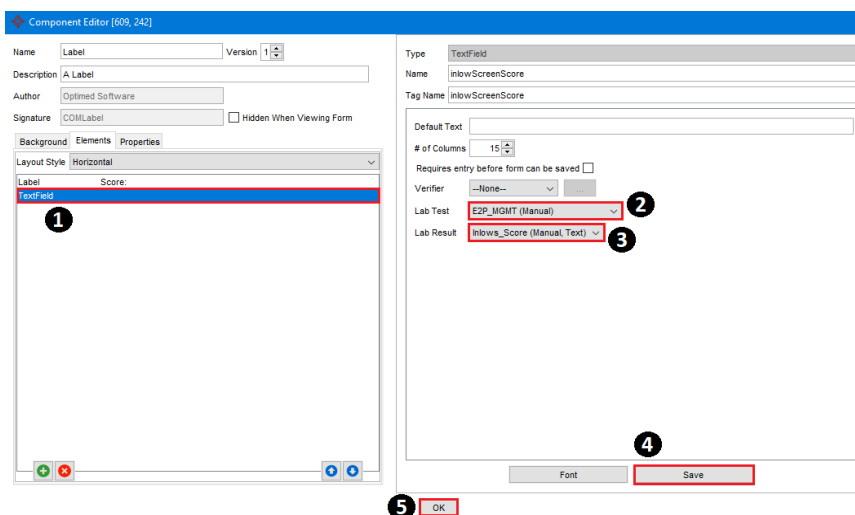
Select **Last completed:** Right-click and select **Edit**.

The Component Editor window will open. Click Lab Test and select "**E2P_MGMT**".

Click Lab Result and select "**E2P_DM_PR (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_DM_PR (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 Safe Form window.
4. And finally, click **Close** at the bottom to close this window.

If you have not downloaded "E2P – DM – Patient Resources", you are now ready to use the tool!

If it was   the proceed to Step B. Mapping Form Elements to C. E2P – DM – Patient Resources.

2. E2P – DM- Patient Resources

Staying in the **Form Editor**:

Look for the **E2P** – **DM- Patient resources** in the **Standard Forms list**.
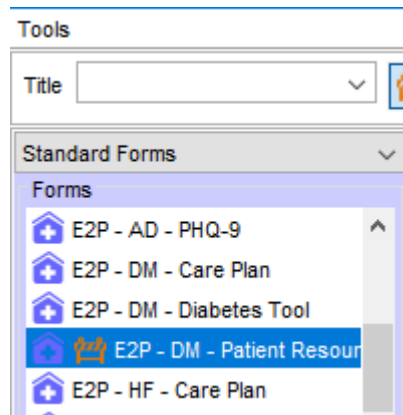
Click on the tool name line to select the tool.

Once the tool appears,

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_DM_PR (Manual, Text)"**.

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

At the bottom of the page.
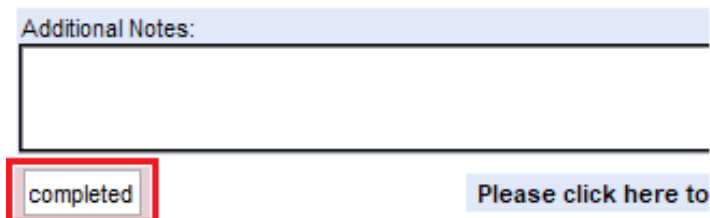
Select: **completed**. Right-click and select **Edit.**

The Component Editor window will open.

Click Lab Test and select "**E2P_MGMT**".

Click Lab Result and select "**E2P_DM_PR (Manual, Text)**".
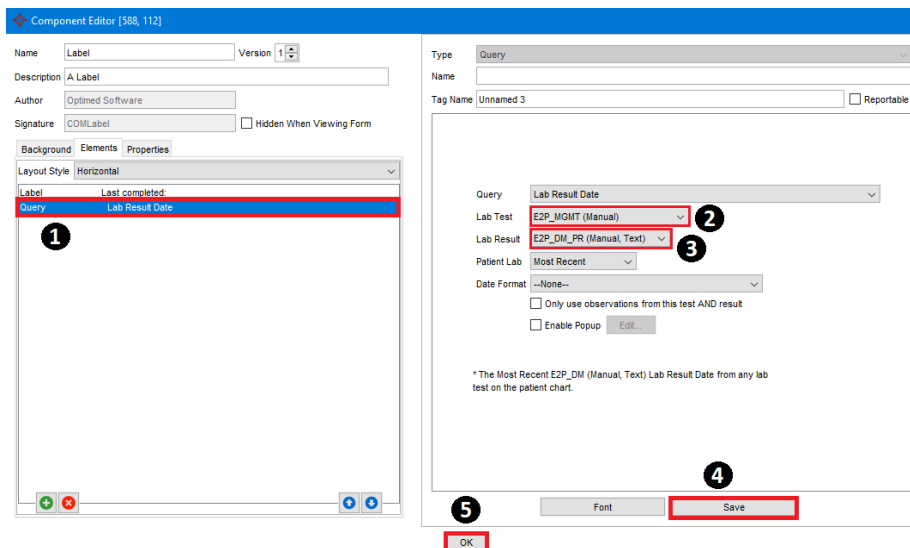
Click **Save** and **OK**.
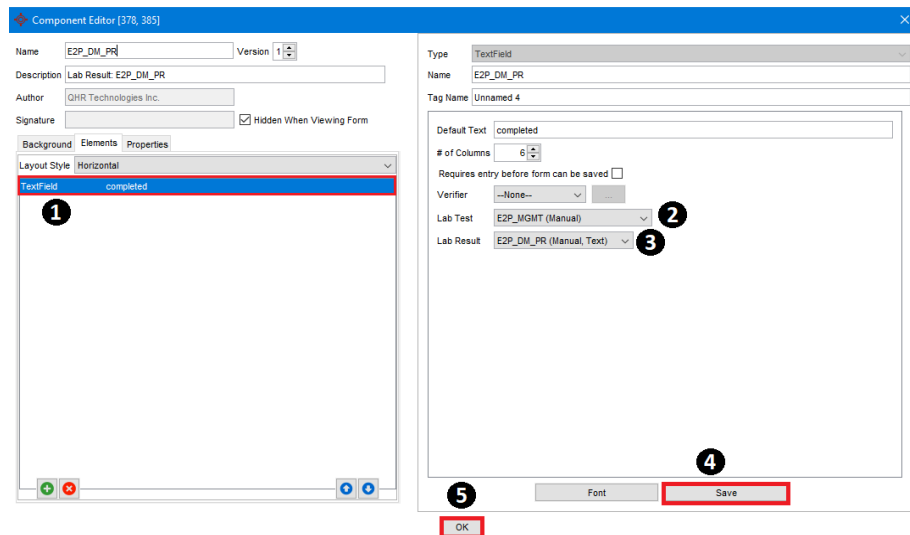
1. Make sure to click on the **orange construction sign** to make it available; it will turn blue.
2. Click on the top right **file button** to **save**.
3. Then click **OK** in the Safe Form window.
4. And finally, click **Close** at the bottom to close this window.
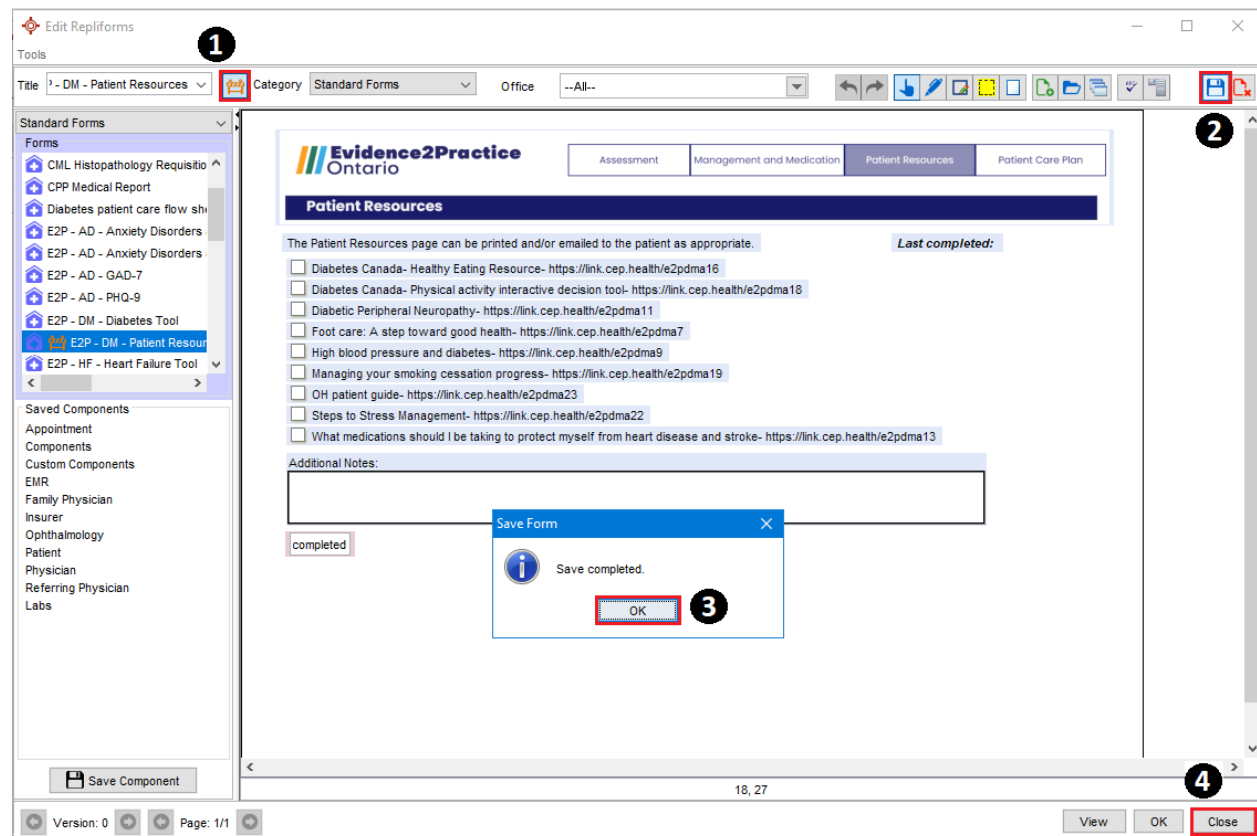
You are now ready to use the tool!

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 diabetes 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.
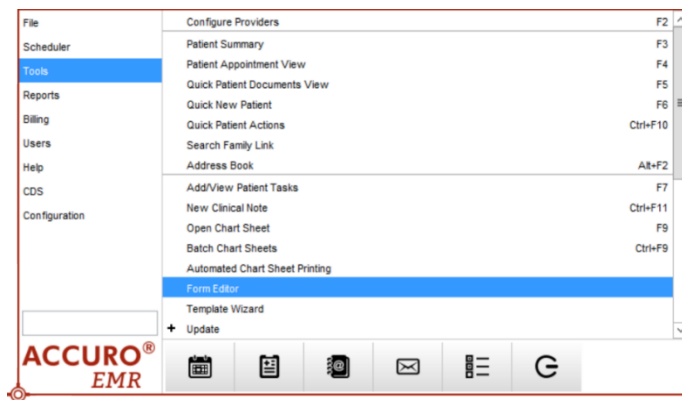
Within the Form Editor, click the top left **Tools** button and select the **Publish/Download** option.
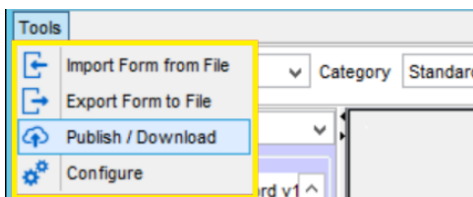
The Form Publisher window will open. To find the tool:
1.   In **Red**, you enter "**E2P**" into the search bar.
2.   Select **"E2P-DM-Diabetes Tool"** in the list, shown in green.
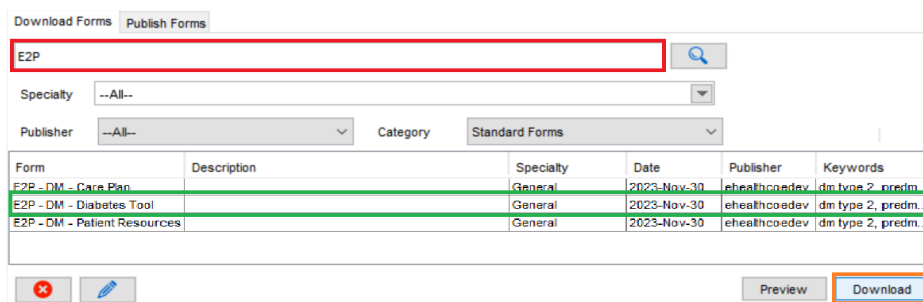
3.   Finally, click **Download** to import it into your Accuro EMR, shown in **Orange**.

*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 each page. It will look like this:

Please click here to provide feedback on this tool ⓘ

It will open a new window to the feedback form:

E2P - DM - Diabetes Tool

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@amplifycare.com and we will be happy to help!

Appendix

Table of Contents

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.
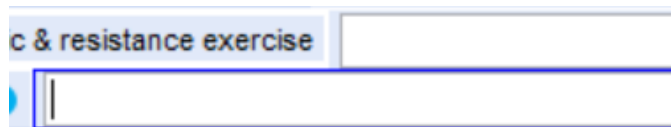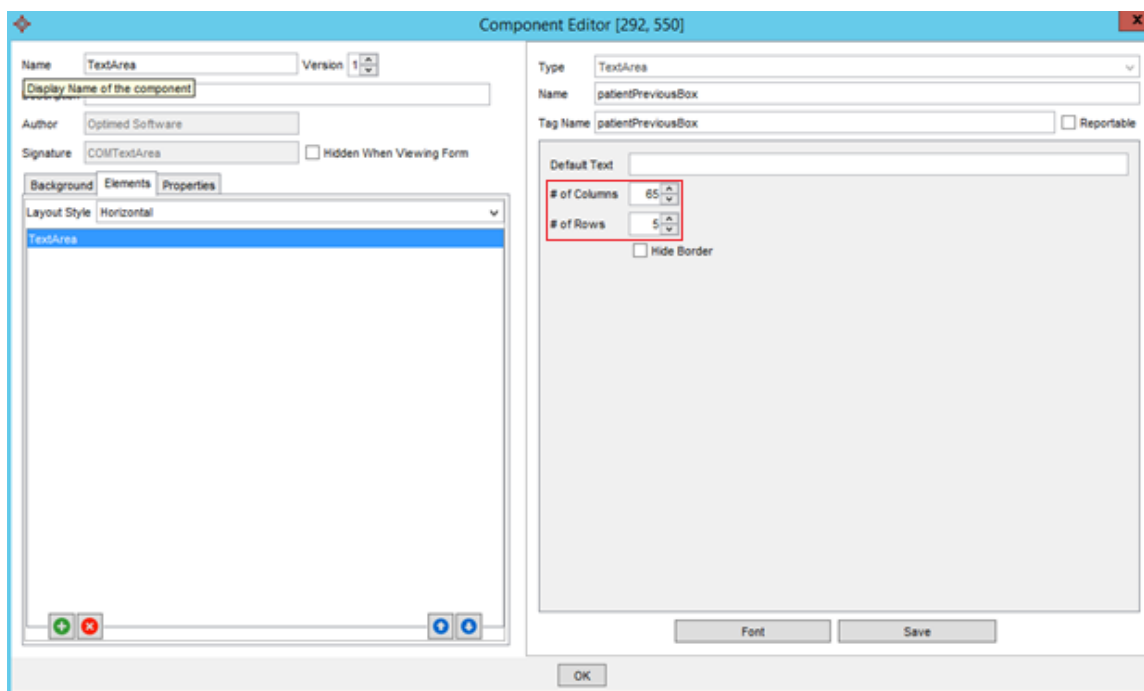2. Double click on the E2P tool to open the form.
3. Right click on the text box you want to adjust the size of then choose Edit.


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**.
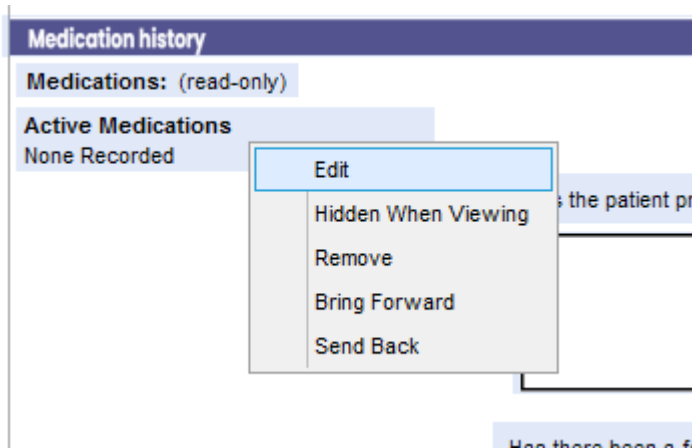

2. The default setting for the medication section is vertical. Horizontal and custom options are also available where the columns can be adjusted as needed.
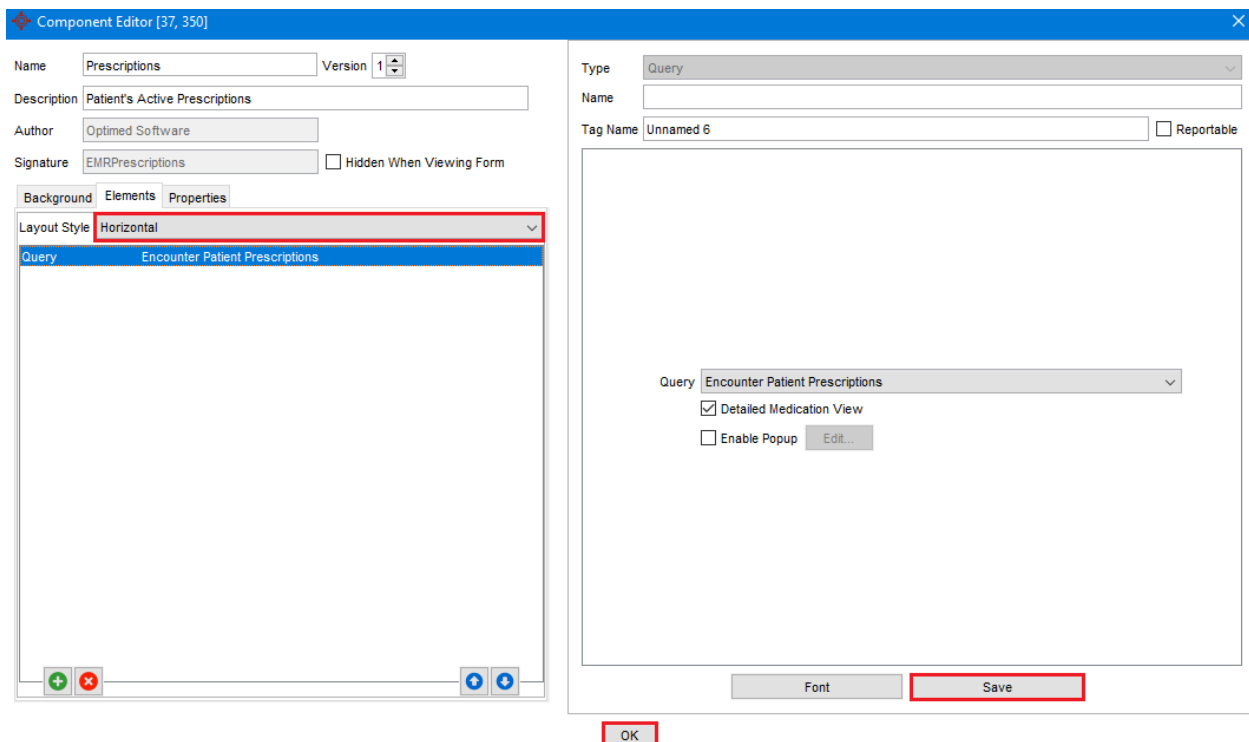
3. Once you are happy with the new layout, click **Save**, then **OK**.

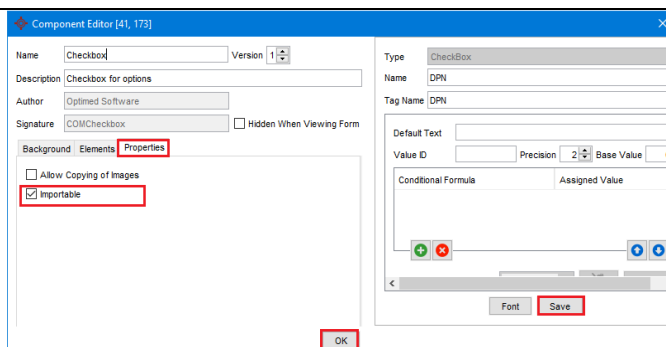## How fix the checkboxes in the patient resources page:

1. Navigate to Form Editor
2. Search for **E2P – DM – Patient Resources**, and double click to open.
3. Navigate to the checkbox titled: "**Diabetic Peripheral Neuropathy**", right-click and select **"Edit"**.
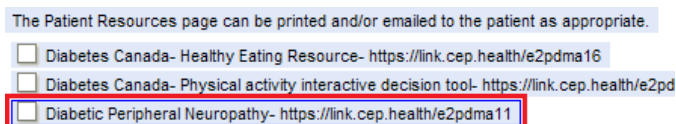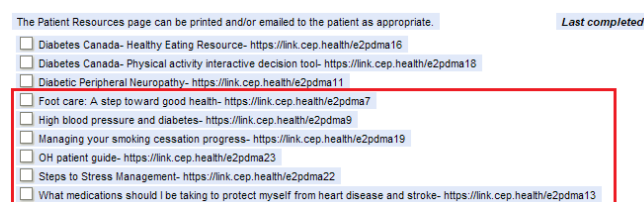

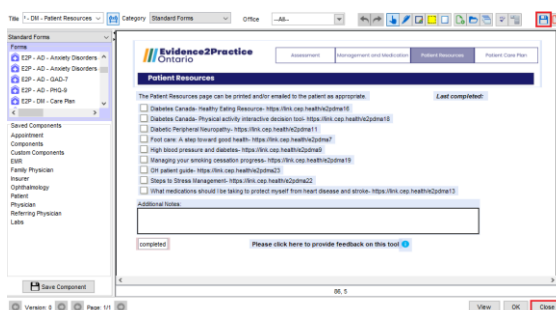|	
On the Left-hand side, click on **"Properties"**. Check the checkbox titled **"Importable"**. Click **Save,** then **OK.**	
4. Repeat for the remaining checkboxes.	
5. Once finished, click the **save icon** on the top right corner of the window. 6. Then click **closed**.	

E2P brings together multi-disciplinary, cross-sector expertise under the joint leadership of the Centre for Effective Practice, 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.