

Disclaimer

Please allocate <u>30-60 minutes</u> for this installation process and note that it is crucial that **ALL Iab results are added** to optimize functionality.

As part of the Evidence2Practice Ontario (E2P) program, <u>Amplify</u> <u>Care</u> (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 <u>EMRtools@amplifycare.com</u> and we will be happy to help!

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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.

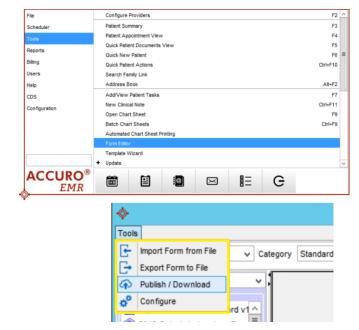
From the Accuro EMR, click on the Accuro target menu icon.

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.



Green.

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



💠 Form Publisher							×
						Repository	Default 🗸 🗸
Download Forms Publish Fo	irms						
E2P					Q		
SpecialtyAll					•		
PublisherAll	~ (Category	Standar	rd Forms	~		
Form	Description		:	Specialty	Date	Publisher	Keywords
E2P - DM - Care Plan			C	General	2023-Nov-30	ehealthcoedev	dm type 2, predm
E2P - DM - Diabetes Tool			0	General	2023-Nov-30	ehealthcoedev	dm type 2, predm
E2P - DM - Patient Resources			0	General	2023-Nov-30	ehealthcoedev	dm type 2, predm
8						Preview	Download

- 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.

Past		Ö	1 7 🗟 🔗 🖶	Ope
2022-Aug-12 at 12:00pm B Test	Notes	^	History of Problems	0
0	2021-Jun-30: Ocean: Referral to Dr. Andrzej Rochowski - Pediatrics Consult Sent referral to Dr. Andrzej Rochowski 1837 Woodroffe Ave unit 102, Ottawa, ON, K2G-1W2 Phone: 613-274-0131 Fax: 613-274-0355 Referral		None Recorded	
2022-Apr-11 at 1:15pm B Test	Information Reason for Referral Failure to thrive Neutropenia History Testing CCP Allergies: No Known Allergies https://ocean.com/isatint/ com/vreferra		▼ Active Medications	
0	2021-Jun-30: Note	=	None Recorded	
2020-Sep-28 at 11:30am Consultation	2021-Jun-30. Note Provider: Test, Bradley	•	External Medications	0 1
B Test 0	2021-May-06: Ocean: Referral to DEMO SCA Medical Clinic (OSCAR) - General Surgery Sent referral to DEMO SCA Medical Clinic (OSCAR) 419 Philip St, Waterloo, ON, N2L 3V2. Reason for Referral: Testing	•	fluoxetine HCL 20 mg/5 ml (4 mg/n Solution, Oral []	mi) Ora
2020-Sep-24 at 9:45am	https://ocean.cognisantmd.com/referrals/Referral.html?ref=bd77baef-d410-42b9-a0d2-710149a0ca508accessKey=5a33838e-1cc4-4bcf-a852-5c972fb 0954c#gWab0VTHnUJenuKPUZGmg==		Surgical/Medical History	C
Consultation B Test	2021-May-06: Note		None Recorded	
0	Provider: Test, Bradley	•	Allergies	<
	2021-Apr-29: Ocean: Referral to DEMO SCA Medical Clinic (OSCAR) - General Surgery		None Recorded	
	Sent referral to DEMO SCA Medical Clinic (OSCAR) 419 Philip St, Waterloo, ON, N2L 3X2 Reason for Referral: Sending from Accuro with attachment Alterning: No Known Alterning	~	Immunization Schedule	6
			None Recorded	
	Labs 🙀 📷 🔘 🤌 By Tests	¥	Immunization Summary	6

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



3. Click the pencil icon to edit the lab test.

\$	Lab Tests X
Test Search	Q
Select a Test Name:	
CHOL Panel (Optimed) Custom Test (Manual) E2P_Labs (Manual) E2P_Labs1 (Manual) E2P_MGMT (Manual)	E2P_MGMT (Manual, Text) GAD-7 (Optimed, Numeric) PHQ-9 (Optimed, Numeric)
E2P_MGMT (Manual) E2P_MGMT2 (Manual) eGFR (Manual) HbA1C (Manual) HbA1C (Manual)	
	OK Close

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

Lab Test: E2P_MGM	ЛТ
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 e	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, <u>you will need to manually create them</u> 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).



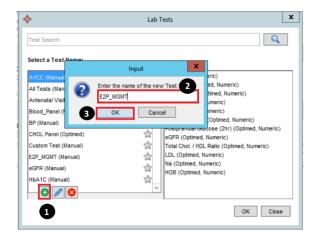


Lab Test: E2P_MGMT

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.

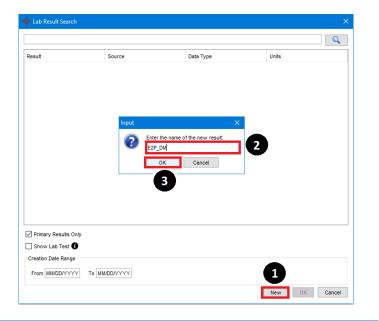
💠 Edit Lab Tes	ŧ	×
E2P_MGMT		
Test Results		
0	0	0
LOINC Number		
Source:	Manual	
Source Code		
	Default ~	
Source Code	Default ~	Close



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"**

💠 Edit Result			×
	E2P_DM		
Source:	Manual]	
Source Co	le:		
Data Type: Numeric Settings Units: Reference Ranges:) Numeric 🔘	Text	There are a couple rules to keep in mind about the relationship between a result and observations of it. 1. You cannot change the data type of a result once an observation
Laboratory Gender	Age	Reference Range	of it has been recorded. 2. Changing the Reference Ranges and Units of a result doesn't affect already recorded observations and is only used for entering new manual lab observations.
Linking	OK Ca	ancel	

Click on the E2P_DM result line and click OK to add it to the Lab Test.

Result	Source	Data Type	Units	
E2P_DM	Manual	Text		
_				
Primary Results Or	ny			
Primary Results Or				



Lab Value: Inlows_Score

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

💠 Edit Lab Tes	t	×
E2P_MGMT		
Test Results		
E2P_MGMT (Ma	nual, Text)	
GAD-7 (Optime		
PHQ-9 (Optimed		
E2P_DM (Manua	al, Text)	
•	0	0
LOINC Number		
Source:	Manual	
Source Code		
Source Code		
Category	Default ~	

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.)

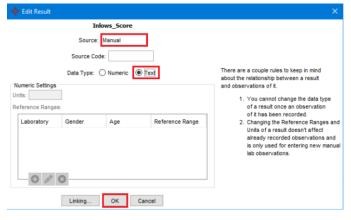
The edit the Result

Enter the following:

window will open.

- Source: Manual
- Data Type: **Text** Then click **"OK"**

💠 Lab Result Search			
			Q
Result	Source	Data Type	Units
	Input Enter the name of Inlows_Score OK 3	the new result. Cancel	
Primary Results Only			
Show Lab Test 👔			
Creation Date Range			
From MM/DD/YYYYY To MM			0
		[New OK Cancel





New OK Cancel

Lab Value: E2P_DM_PR

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

		×
2P_MGMT Test Results		
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DINC Number	0	00
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		00

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.)

				Q
Result	Source	Data Type	Units	
			_	
	Input		×	
		inter the name of the new result: E2P_DM_PR	2	
	L	OK Cancel		
		3		
Primary Results Only				
Show Lab Test				
Show Lab Test				
Creation Date Range				



The edit the Result window will open. Enter the following:

- Source: Manual
- Data Type: **Text** Then click **"OK"**

	Source Source Co	2P_DM_PR) Text	There are a couple rules to keep in mind about the relationship between a result
Numeric Settings Inits: Reference Range Laboratory		Age	Reference Range	and observations of it. 1. You cannot change the data type of a result once an observation of thas been recorded. 2. Changing the Reference Ranges and Units of a result doesn't affect already recorded observations and
00	Linking	ОК	Cancel	is only used for entering new manual lab observations.

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

2P_DM_PR	Manual	Text	
ts Only			
Show Lab Test 👔			
Orantino Data Danas			
Creation Date Range			

Lab Value: GAD-7

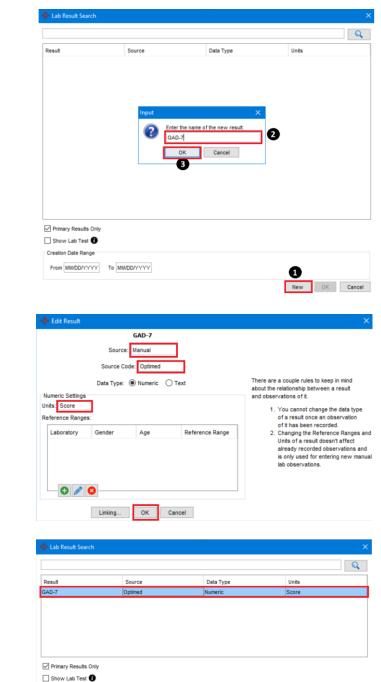
Click the **green plus sign** to add the Lab Value.

E2P_MGMT Test Results Converting the second secon	🔶 Edit Lab Test	1	×
LONC Number Source: Manual Source Code Category Defaut	E2P_MGMT		
LOINC Number Source: Manual Source Code Category Defaut ~	Test Results		
LOINC Number Source: Manual Source Code Category Defaut ~			
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Source: Manual Source Code Category Defaut	• •	00	
Source Code Category Default ~	LOINC Number		
Category Default ~	Source:	Manual	
	Source Code		
01/	Category	Default ~	
OK Close		OK	Close



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

Then click "OK".



Enter the following:

Source: Optimed

Edit the Result window

- Data Type:
 Numeric
- Units: Score

will open.

Then click "OK"

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

Show	Lab Test 🚺	
Creation	Date Range	

New OK Cancel



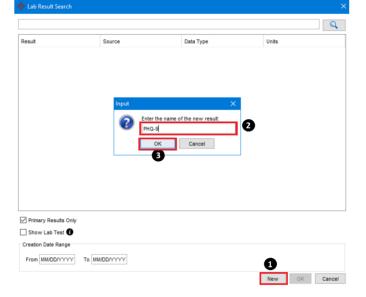
Lab Value: PHQ-9

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

E2P_MGMT		
Test Results		
-0/	0	00
LOINC Number	0	00
		00
LOINC Number		00

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.

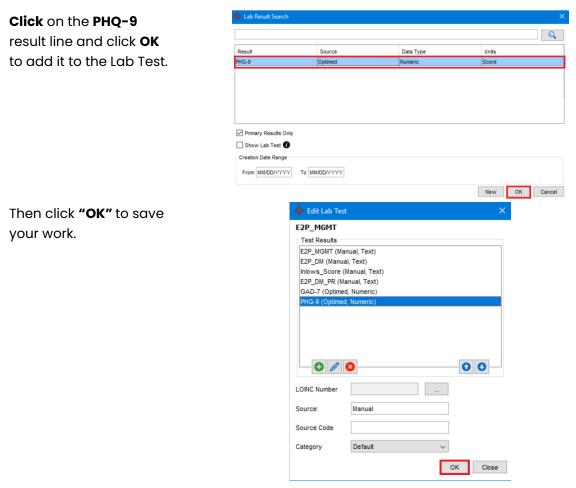
Enter the following:

- Source: Optimed
- Data Type:
 Numeric
- Units:
- Score

Then click "OK".

		PHQ-9		
umeric Settings its: Score ference Range	Source Co Data Type:	: Manual ode: Optimed) Text	There are a couple rules to keep in mind about the relationship between a result and observations of it. 1. You cannot change the data type of a result once an observation
Laboratory	Gender	Age	Reference Range	of it has been recorded. 2. Changing the Reference Ranges : Units of a result doesn't affect already recorded observations an is only used for entering new mar lab observations.





Step 2: Mapping Form Elements

1. E2P - DM- Diabetes Tool

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

File	Configure Providers					
Scheduler	Patient Summary					
Tools	Patient Appointment View					
Reports	Quick Patient Documents View	F5				
	Quick New Patient	F6				
Billing	Quick Patient Actions	Ctrl+F10				
Users	Search Family Link					
Help	Address Book	Alt+F2				
CDS	Add/View Patient Tasks					
Configuration	New Clinical Note C					
	Open Chart Sheet					
	Batch Chart Sheets					
	Automated Chart Sheet Printing					
	Form Editor					
	Template Wizard					
	► Update					
ACCURO [®] EMR						



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.

💠 Edit Repliforms	
Tools	
Title	√ Ca
Standard Forms	~
Forms	
🚹 E2P - AD - GAD-7	^
🚹 E2P - AD - PHQ-9	
💼 E2P - DM - Diabetes Tool	
👔 E2P - HF - Care Plan	
🚹 E2P - HF - Heart Failure Tool	~
< >	

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

s and Prediabetes Tool

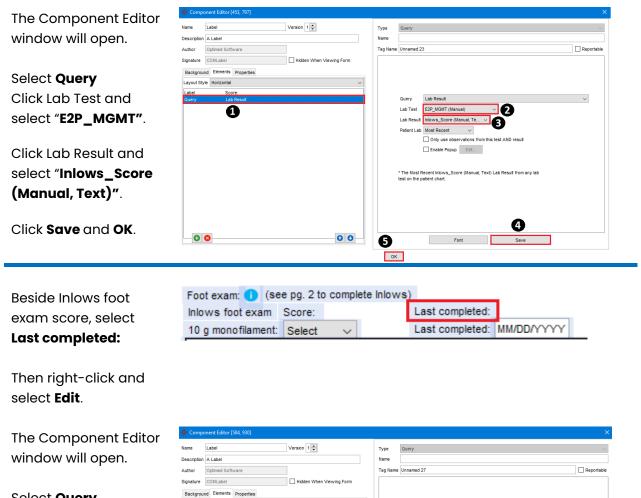


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Click Lab Test and	Background Layout Style	Elements Properties					
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select " E2P_MGMT" .	Query	Lab Result Date				ib Test E2P_MGMT (Manual) V	
		0			Lat	E2P_DM (Manual, Text) V	
Click Lab Result and					Pat	atient Lab Most Recent ~	
Click Lab Result and					Dat	ate Format	
select "E2P_DM						Only use observations from this test AND result Enable Popup Edit	
						_ Enable Popup _ EOL	
(Manual, Text)".						he Most Recent E2P_DM (Manual, Text) Lab Result Date from any lab t on the patient chart.	
Click Save and OK .							
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	- 3 8		00	1	6	Font Save	
					ОК		

Beside Inlows foot exam, select Score: Then right-click and select Edit.

Foot exam: 🕕 (se	m: 🕕 (see pg. 2 to complete Inlows)						
Inlows foot exam	Score:		Last completed:				
10 g monofilament:	Select	~	Last completed:	MM/DD/YYYY			





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.

PHQ-9: Latest score GAD-7: Latest score

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Last completed: Last completed:

6

ОК

Lab Result Date

Lab Result Inlows_Score (Manual, Te... >

Font

Only use observations from this test AND result Enable Popup Edit...

* The Most Recent Inlows_Score (Manual, Text) Lab Result Date from any lab test on the patient chart.

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4

Lab Test E2P_MGMT (Manual)

Date Format MM/dd/yyyy: 12/05/2023

Patient Lab Most Recent

Query

00



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The Component Editor Label Version 1 🜩 Query Name Туре window will open. Name Description A Label Reportable Optimed Software Tag Name Unnamed 23 Author Signature COMLabel Hidden When Viewing Form Background Elements Properties Select Query. ayout Style Horizontal Lab Result Query 0 Lab Test E2P_MGMT (Manual) 20 Click Lab Test and Lab Result PHQ-9 (Optimed, Numeric 8 select "E2P_MGMT". Patient Lab Most Recent ~ Only use observations from this test AND result Enable Popup Edit... Click Lab Result and * The Most Recent PHQ-9 (Optimed, Numeric) Lab Result from any lab test on the patient chart. select "PHO-9 (Optimed, Numeric)". 4 00 08 Click Save and OK. Font Save 5 ок Beside PHQ-9: Latest PHQ-9: Latest score Last completed: score, select: Last GAD-7: Latest score Last completed: 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**.

🔶 Compo	nent Editor [497, 1019]					
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PHQ-9: Latest score	Last completed:
GAD-7: Latest score	Last completed:



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T I O I F ⁽¹⁾	💠 Component Editor [357, 1036]	_×
The Component Editor window will open.	Name Label Version 1 () Type Query Description A Label Name Name Author Optimed Software Tag Name Unnamed 25	Reportable
Select Query .	Background Elements Properties Layout Style Horizontal Label GAD-7: Latest score Duesy Lab Result Ouery Lab Result Ouery	~
Click Lab Test and select " E2P_MGMT" .	Lab Test Lab Test Lab Result GAD-7 (Manual) Data Result GAD-7 (Manual) Patient Lab Most Recent Chry use observations from this test AND result Enable Popup Edd.	
Click Lab Result and select " GAD-7 (Optimed, Numeric)".	* The Most Recent GAD-7 (Optimed, Numeric) Lab Result from any lab test on the patient chart.	
Click Save and OK .	C C C C C C C C C C C C C C C C C C C	
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ore, select: **Last** completed: Then right-click and select Edit.

PHQ-9: Latest score	
GAD-7: Latest score	

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Click Lab Test and		0			Lab Test	E2P_MGMT (Manual) 2				
		•				GAD-7 (Optimed, Numeric) V				
select "E2P_MGMT".					Patient La	ab Most Recent Only use observations from this test AND result				
						Enable Popup Edit				
Click Lab Result and						st Recent GAD-7 (Optimed, Numeric) Lab Result from any lab				
select "GAD-7					test on the	e patient chart.				
(Optimed, Numeric)".										
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Click Save and OK .	-0	0	00	6)	Font Save				
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Select: completed Right-click and select Edit.

Please click here to provide feedback on this tool	completed	



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The Component Editor	💠 Component Editor [398, 1080]			×			
window will open.	Name E2P_DM	Version 1	Туре	TextField ~			
window win open.	Description Lab Result: E2P_DM		Name	E2P_DM			
	Author QHR Technologies Inc.]	Tag Name	Unnamed 19 Reportable			
Click Lab Test and	Signature	Hidden When Viewing Form	Default	Text completed			
select "E2P_MGMT".	Background Elements Properties		# of Col	umns 6 🜩			
Select EZF_IVIGIVIT .	Layout Style Horizontal TextField completed	~	Requires entry before form can be saved				
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 (Manual, Text)".							
Click Save and OK .							
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	- 🗢 😆	00		Font Save 4			
		5 ок					

Go to page 3.

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

Score:	
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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**.

💠 Component Editor [609, 242]	
Name Label Version	Type TextField
Description A Label	Name inlowScreenScore
Author Optimed Software	Tag Name inlowScreenScore
Signature COMLabel Hidden When Viewing Form	Default Text
Background Elements Properties	# of Columns 15 🜩
Layout Style Horizontal 🗸	Requires entry before form can be saved
Label Score:	VerifierNone
TextField	Lab Test E2P_MGMT (Manual) V
0	
_	Lab Result Inlows_Score (Manual, Text) V
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00	Font Save
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Go to page 4: Management and Medication.					
Select Last completed: Right-click and select Edit .	Assessment	Management and Medication	Patient Resources	Pc ed:	
The Component Editor window will open.	Component Editor (574, 99) Name Label Description A Label Author Optimed Software Signature COMLabel	Version 12	Type Query Name Tag Name Unnamed 2		×
Click Lab Test and select " E2P_MGMT" .	Background Elements Properties Layout Style Horizontal Label Last completed Query Lab Result Date	~	Lab Result E2P_DM	MT (Manual) 2 (Manual, Text) 2	~
Click Lab Result and select "Inlows_Score (Manual, Text)".			Enabi	cent	
Click Save and OK .	-00	00-	•	Font Save	
Go to page 5: Patient Resources.	Patient Resources	Patient Care Plan	OK		
Select Last completed: Right-click and select Edit .	Last com	pleted:			



completed

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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.

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1									Lab Result	COD, DM, DD (Manual Taut)	
									Patient Lab	Most Recent V	
									Date Format	None V	
										Only use observations from this test AND result	
										Enable Popup Edit	
									* The Most Re test on the pa	ecent E2P_DM (Manual, Text) Lab Result Date from any lab atlent chart.	
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Scroll to the bottom of the page.

Additional Notes:

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.

🔶 Compo	onent Editor [378, 385]				×
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- 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.

💿 Edit Repliforms	_	
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Title E2P - DM - Diabetes Tool V	Category Standard Forms V OfficeAll	
Standard Forms 🗸 🗸		
Forms	/// Evidence2Practice	9
CML Histopathology Requisitio ^	Evidence2Practice Assessment Management and Medication Patient Resources Patient Care Plan	
CPP Medical Report		
Diabetes patient care flow she	Patient Resources	
E2P - AD - Anxiety Disorders	The Patient Resources page can be printed and/or emailed to the patient as appropriate.	
E2P - AD - Anxiety Disorders	Diabetes Canada- Healthy Eating Resource- https://ink.cep.health/e2pdma16	
6 E2P - AD - GAD-7	Diabetes Canada- Physical activity interactive decision tool- https://link.cep.health/e2pdma18	
E2P - AD - PHQ-9	Diabetic Peripheral Neuropathy- https://link.cep.heath/e2pdma11	
🙆 🚧 E2P - DM - Diabetes Tool	Foot care: A step toward good health- https://ink.cep.health/e2pdma7	
E2P - HF - Care Plan	High blood pressure and diabetes- https://ink.cep.health/e2pdma9	
E2P - HF - Heart Failure Tool ∨	Managing your smoking cessation progress- https://link.cep.health/e2pdma19	
< >	OH patient guide- https://link.cep.health/e2pdma23	
Saved Components	Steps to Stress Management- https://link.cep.health/e2pdma22	
Appointment Components	What medications should I be taking to protect myself from heart disease and stroke- https://link.cep.health/e2pdma13	
Custom Components	Additional Notes:	
EMR		
Family Physician		
Insurer Ophthalmology	Save Form X	
Patient		
Physician	Save completed.	
Referring Physician		
Labs	ок З	
		~
Save Component	<	^`
	18, 27	<u> </u>
Version: 0 O Page: 5/7	View	OK Close

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 <u>C. E2P – DM – Patient</u> <u>Resources.</u>



* The Most Recent E2P_DM (Manual, Text) Lab Result Date from any lab test on the patient chart.

Font

4

Save

2. E2P - DM- Patient Resources

Staying in the Form		Tools					
Editor:		Title		```	~ 😢		
Look for the		Standard Forms			\sim		
E2P – DM- Patient		Forms					
resources in the		🙆 E2P - AD -	PHQ-	-9	^		
Standard Forms list.		💿 E2P - DM -	Care	Plan			
		💿 E2P - DM -	Diabe	etes Tool			
Click on the tool name		🙆 🚧 E2P - I	DM - F	Patient Resou			
line to select the tool.		6 E2P - HF -					
Once the tool appears,		Patient Resources	5	Patient Ca	re Plan		
Select Last completed:	_						
Right-click and select							
Edit.		Last com	nlote	od:			
		Last com	prete				
The Component Editor	💠 Component Editor [588, 112]						
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select "E2P_DM_PR				Patient Lab Most Recent	~	3	
(Manual, Text)".				Date FormatNone	ervations from this t	est AND result	
-				Enable Popup	Edit		

Click Save and OK.

08

At the bottom of the page.

Select: completed. Right-click and select Edit.

Additional Notes:	
completed	Please click here to

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ОК

Reportable



Installation Guide Accuro QHR EMR

The Component Editor	💠 Component Editor [378, 385]			×	
•	Name E2P_DM_PR	Version 1	Туре	TextField ~	
window will open.	Description Lab Result: E2P_DM_PR		Name	E2P_DM_PR	
·	Author QHR Technologies Inc.		Tag Name	e Unnamed 4	
	Signature	Hidden When Viewing Form	Default	Text completed	
Click Lab Test and	Background Elements Properties		# of Co		
	Layout Style Horizontal V		Requires entry before form can be saved		
select "E2P_MGMT".	TextField completed		Verifier		
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Click of Decult and			Lab Re	suit E2P_DM_PR (Manual, Text) V	
Click Lab Result and					
select "E2P_DM_PR					
(Manual, Text)".					
Click Save and OK .					
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- 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.

Edit Repliforms		
Title - DM - Patient Resources ~	Category Standard Forms V OfficeAll	"I 💾 🕒
Standard Forms Forms CILL Histopathology Requisitio CILL Histopathology Patient Physician Labs Save Component	Image: Second	
Version: 0 O Page: 1/1	18, 27	OK Close

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.

File	Configure Providers			
Scheduler	Patient Summary			
Tools	Patient Appointment View			
	Quick Patient Documents View			
Reports	Quick New Patient	F6	≡	
Billing	Quick Patient Actions	Ctrl+F10		
Users	Search Family Link			
Help	Address Book Alt+F2			
CDS	Add/View Patient Tasks F7		П	
Configuration	New Clinical Note Ctrl+F11			
comgaration	Open Chart Sheet F9			
	Batch Chart Sheets Ctrl+F9			
	Automated Chart Sheet Printing			
	Form Editor			
	Template Wizard			
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Tools				
Ŀ	Import Form from File	¥	Category	Standard
G•	Export Form to File			
P	Publish / Download		<u>~</u> }	
¢°	Configure	rd v1 ·		

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

- 1. In **Red**, you enter "**E2P**" into the secret bar.
- 2. Select "E2P-DM-Diabetes Tool" in the list, shown in

E2P Specialty	All					v		
Publisher	All		 ✓ Cate 	gory	Standard Forms	~		
Form		Description			Specialty	Date	Publisher	Keywords
E2P - DM - C	are Plan				General	2023-Nov-30	ehealthcoedev	dm type 2 predm
E2P - DM - D	iabetes Tool				General	2023-Nov-30	ehealthcoedev	dm type 2, predm.
E2P - DM - P	atient Resources				General	2023-Nov-30	ehealthcoedev	dm type 2, predm.

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: <u>Mapping</u> 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 <u>EMRtools@amplifycare.com</u> and we will be happy to help!



Appendix

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How to Change the Size of a Text Box	
How To Change the Orientation of the Medication List	26
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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.

c & resistance exercise	

- 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.

Name Type Type Teddress Author Optimed Software Sipatare Outfresdares Type Teddress Type Teddress <	Comj	ponent Editor [292, 550]
	Name TextArea Version Image: Component Display Name of the component Image: Component Image: Component Author Optimed Software Signature COMTextArea Image: ComtextArea Background Elements Properties Layout Style Horizontal Image: Component	Type TexArea Name patientPreviousBox Tag Name patientPreviousBox Default Text # of Columns 65 # of Rows 5 # of Rows
		Font Save

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**.

Medication history	
Medications: (read-or	ıly)
Active Medications None Recorded	Edit
	Hidden When Viewing the patient pr
	Remove
	Bring Forward
	Send Back
	Has there been a fi

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.

Component Editor [37, 350] ×									
Name	Prescriptions	Version 1	Туре	Query				\sim	
Description	Patient's Active Prescriptions		Name						
Author	Optimed Software		Tag Name	Unnamed	6			Reportable	
Signature	EMRPrescriptions	Hidden When Viewing Form							
Backgrou	nd Elements Properties								
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Query	Encounter Patient Prescriptions								
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					Detailed Medication View				
				L	Enable Popup Edit				
	8	00			Font		Save		
	<u> </u>				Font		3475		
			OK						

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".**

The Patie	nt Resources page can be printed and/or emailed to the patient as appropriate.							
Diab	etes Canada- Healthy Eating Resource- https://link.cep.health/e2pdma16							
Diabetes Canada- Physical activity interactive decision tool- https://link.cep.health/e2pd								
Diab	atic Peripheral Neuropathy- https://link.cep.health/e2pdma11							
On the Left-hand side,	Component Editor [41, 173]							
click on "Properties" .	Name Checkbox Version 1 + Type CheckBox Description Checkbox for options Name DPN							
	Author Optimed Software Tag Name DPN							
	Signature COMCheckbox Hidden When Viewing Form							
Check the checkbox titled	Background Elements Properties Value D Precision 2 2 Base Value 0							
"Importable".	Allow Copying of Images Conditional Formula Assigned Value Images							
	-00-							
Click Save, then OK.								
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	OK							
4. Repeat for the	The Patient Resources page can be printed and/or emailed to the patient as appropriate. Last completed:							
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remaining	Diabetes Canada- Physical activity interactive decision tool- https://link.cep.health/e2pdma18 Diabetic Peripheral Neuropathy-https://link.cep.health/e2pdma11							
checkboxes.	Foot care: A step toward good health- https://link.cep.health/e2pdma7							
	High blood pressure and diabetes- https://link.cep.health/e2pdma9 Managing your smoking cessation progress- https://link.cep.health/e2pdma19							
	OH patient guide- https://link.cep.health/e2pdma23							
	Steps to Stress Management- https://link.cep.health/e2pdma22 What medications should I be taking to protect myself from heart disease and stroke- https://link.cep.health/e2pdma13							
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o. Then click closed .	See Grappert 0.5							
	Version 2 O Page 17 O							

E2P brings together multi-disciplinary, cross-sector expertise under the joint leadership of the <u>Centre for</u> <u>Effective Practice</u>, <u>Amplify Care</u>, and <u>North York General Hospital</u>. Funding and strategic guidance for E2P is provided by Ontario Health in support of Ontario's Digital First for Health Strategy.

