

**Updated: April 2025\***

This guide is the most recent version of the tool: **Version 2.0**

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

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## Introduction

Setting up the tool involves 3 main activities:

- 1) Downloading the tool
- 2) Configuring lab values
- 3) Mapping those values in the form

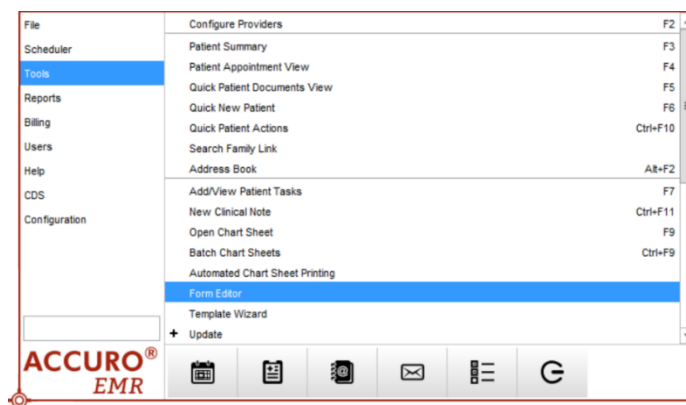
Creating the lab values is a fairly simple process, oftentimes, you may already have some of these lab values already created so you may be able to skip the steps. Some values are specific to the E2P tool and are intended to support the clinical workflow by enabling the date the tool was last completed to be tracked and pulled to the current visit with the patient.

## Step 1: Downloading the E2P Tool

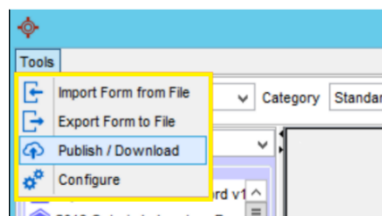
You do not need to have administrative privileges to download the tool.

From the Accuro EMR click on the Accuro target menu icon (insert icon).

Select **Tools** followed by **Form Editor** to launch the form editor window.

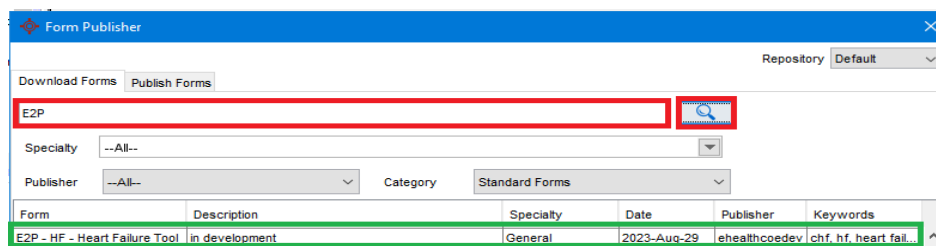


Within the Form Editor, click the top left **Tools** button and select the **Publish/Download** option.



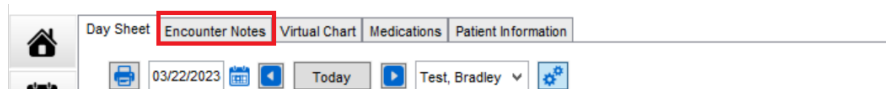
The Form Publisher window will open. To find the tool:

1. Enter **"E2P"** into the search bar, then click the magnifying glass to search.
2. Search and select **"E2P – HF – Heart Failure Tool"** in the list.
3. Finally, click **Download** to import it into your Accuro EMR.



## Step 2: 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.

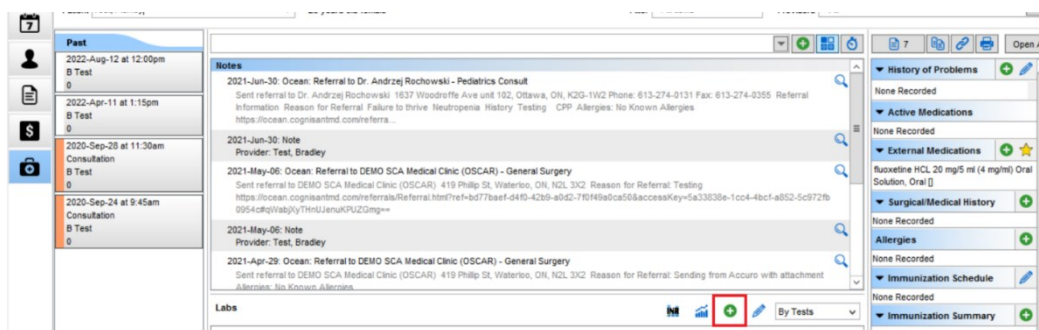
### Instructions for users with pre-existing E2P tools

If you have installed version 1.0 of the HF tool, you will not need to add this lab value to the **E2P\_MGMT** lab test.

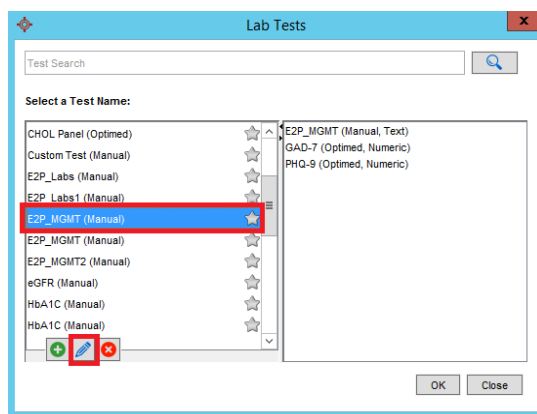
For users who have already installed other E2P tools, the lab test E2P\_MGMT may have been previously created.

### Adding to Lab Test #1 E2P\_MGMT

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 Heart Failure Tool:

Lab Test: E2P_MGMT	
Lab Value Name	Result Criteria
E2P_HF	Source: <b>Manual</b> Data Type: <b>Text</b>

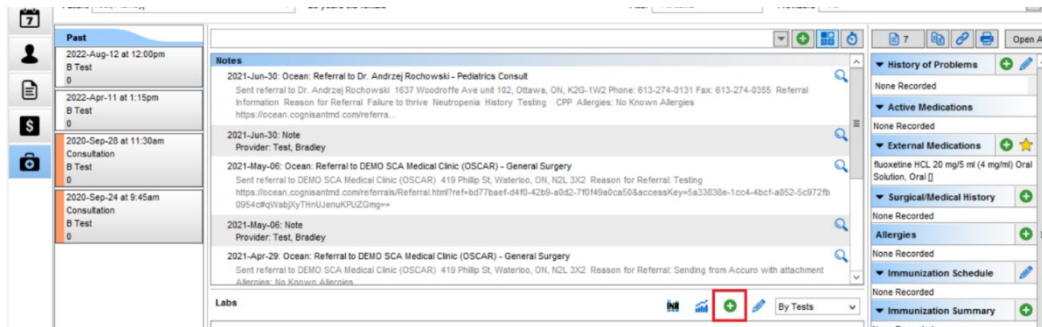
5. Click the **green plus sign** to add the Lab Value.
  - a. Click New and title it "E2P\_HF".
  - b. The Edit the Result window should open, enter the details from the table above.
  - c. Then click **"OK"**.
  - d. Select the "E2P\_HF" line and click "OK".

## Instructions for users new to E2P tools

Users who do not yet have E2P tools in their EMR must create the following lab tests:

- E2P\_MGMT – This lab test will house the last done date values for the all E2P tools
- HF (E2P) – This lab test will house the lab investigation/assessment values for the HF tool

1. To create Lab Tests, click the **green plus button**.

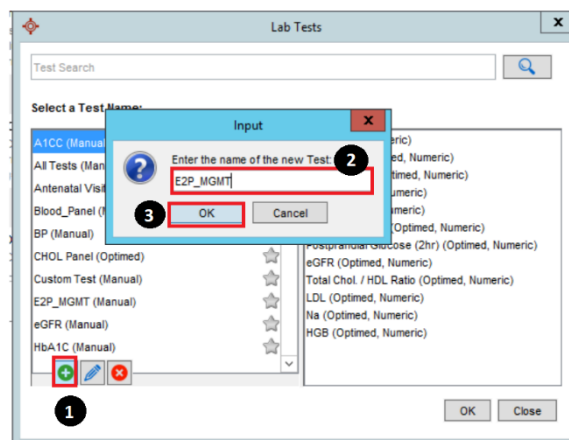


## Creating Lab Test #1: E2P\_MGMT

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 the Lab Value.

### Creating the Lab Value: E2P\_HF

From here click

**New** Title it:

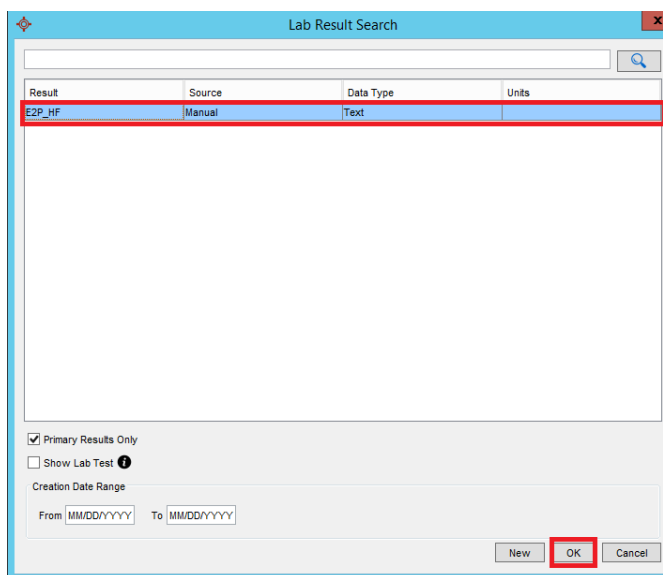
**E2P\_HF.**

Edit the Result window will open.  
Enter the following:

- Source:  
**Manual**
- Data Type:  
**Text**

Then click **OK**

Then **Click** on the  
E2P\_HF result line  
and click **OK** to  
add it to the Lab  
Test.

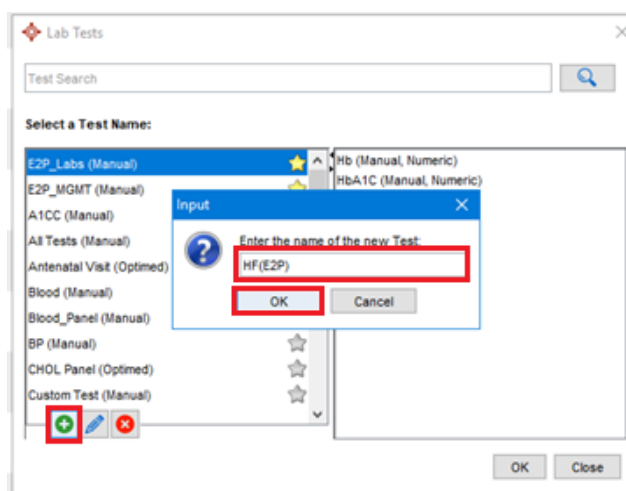


### Creating Lab Test #2: HF (E2P)

To create the first lab test,  
Click the **green plus**  
**button**.

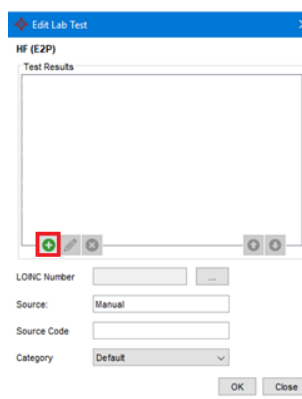
Then enter the name for  
the new Lab Test:  
**HF (E2P)**.

Then click **OK**.



This should open the Edit  
Lab Test Window.

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



The following are the values you will need to be added to the HF (E2P) lab test:

Lab Value Name	Result Criteria
1. NYHA	Source: <b>Manual</b>

	Data Type: <b>Numeric</b> Units: <b>Score</b>
2. LVEF	Source: <b>Manual</b> Data Type: <b>Numeric</b> Units: <b>%</b>
3. dxStatusHF	Source: <b>Manual</b> Data Type: <b>Text</b>

### Creating Lab Result NYHA

From here click **New**

Enter the name: **NYHA**.

Edit the Result window will open.

Enter the following:

- Data Type: **Numeric**
- Units: **Score**

Then click **OK**

Then **select** the **NYHA** result line and click **OK** to add it to the Lab Test.

The 'Lab Result Search' window displays a table with the following data:

Result	Source	Data Type	Units
NYHA	Manual	Numeric	Score

Below the table, there are checkboxes for 'Primary Results Only' (checked) and 'Show Lab Test' (unchecked). A 'Creation Date Range' section includes 'From' and 'To' date pickers. At the bottom right, the 'OK' button is highlighted with a red box.

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

The 'Edit Lab Test' window shows the 'Test Results' section with 'NYHA (Manual, Numeric)' listed. A green plus sign icon is highlighted with a red box at the bottom left of the results list. Below this, there are input fields for 'LONC Number', 'Source' (set to 'Manual'), 'Source Code', and 'Category' (set to 'Default'). 'OK' and 'Close' buttons are at the bottom right.

### Creating Lab Result LVEF

From here click **New**  
Enter the name: **LVEF**.

The 'Lab Result Search' window is shown with an 'Input' dialog box open. The dialog box prompts 'Enter the name of the new result:' and has 'LVEF' entered in the text field. The 'OK' button in the dialog is highlighted with a red box. In the background window, the 'New' button at the bottom right is also highlighted with a red box.

Edit the Result window will open.



Enter the following:

- Data Type: **Numeric**
- Units: **%**

Then click **OK**

**Edit Result**

**LVEF**

Source: Manual

Source Code:

Data Type: ☒ Numeric ☐ Text

Numeric Settings

Units: %

Reference Ranges:

Laboratory	Gender	Age	Reference Range

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 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** Cancel

Then **select** the **LVEF** result line and click **OK** to add it to the Lab Test.

**Lab Result Search**

Result Source Data Type Units

LVEF	Manual	Numeric	%
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☒ Primary Results Only

☐ Show Lab Test ⓘ

Creation Date Range

From MM/DD/YYYY To MM/DD/YYYY

New **OK** Cancel

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

**Edit Lab Test**

**HF (E2P)**

Test Results

- NYHA (Manual, Numeric)
- LVEF (Manual, Numeric)

**+** **-** **↺** **↻**

LOINC Number

Source: Manual

Source Code

Category: Default

OK Close

## Creating Lab Result dxStatusHF

From here click **New**

Enter the name:

**dxStatusHF.**

Lab Result Search

Result	Source	Data Type	Units
--------	--------	-----------	-------

Input

Enter the name of the new result:

dxStatusHF

OK Cancel

☒ Primary Results Only

☐ Show Lab Test ⓘ

Creation Date Range

From MM/DD/YYYY To MM/DD/YYYY

New OK Cancel

Edit the Result window will open.

Enter the following:

- Data Type: **Text**

Then click **OK**

Edit Result

dxStatusHF

Source: Manual

Source Code:

Data Type: ☐ Numeric ☒ Text

Numeric Settings

Units:

Reference Ranges:

Laboratory	Gender	Age	Reference Range
------------	--------	-----	-----------------

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 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 Cancel

Then **select** the

**dxStatusHF** result line and click **OK** to add it to the Lab Test.

Lab Result Search

Result	Source	Data Type	Units
dxStatusHF	Manual	Text	

☒ Primary Results Only

☐ Show Lab Test ⓘ

Creation Date Range

From MM/DD/YYYY To MM/DD/YYYY

New OK Cancel

Finally, click **OK**.  
Close the lab test  
windows.

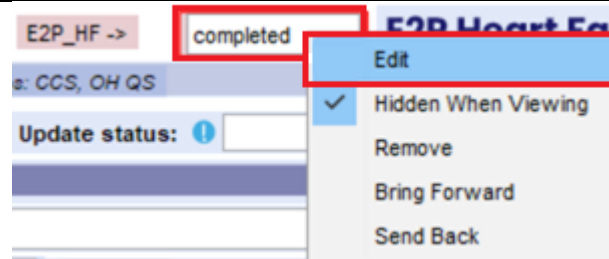
### Step 3: Mapping Form Elements

<p>Choose <b>Tools</b> then <b>Form Editor</b>.</p>	
<p>Look for the <b>E2P Heart Failure Management Tool</b> in the <b>Standard Forms</b> list.</p> <p><b>Click</b> on the tool name line to select the tool.</p> <p>Wait for the tool to appear.</p>	

Follow the red highlighted textboxes with an arrow directing to where to right-click on the mouse.

On page 1

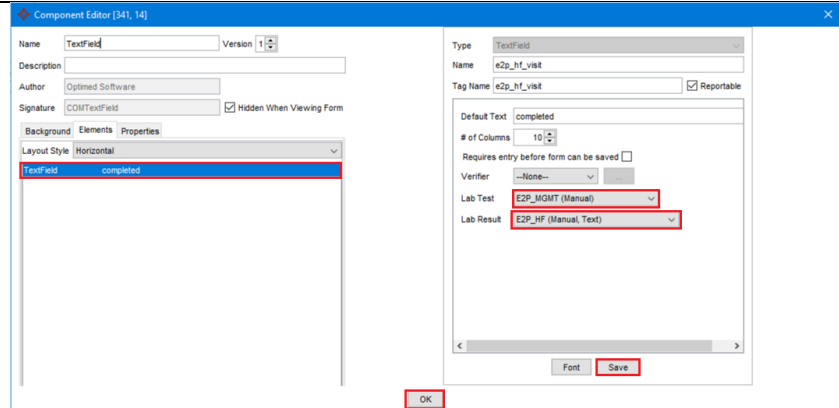
- Select **completed**
- Right-click and click **Edit**.



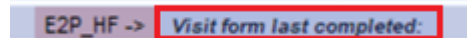
On the left panel, select:  
**TextField - completed**

On the right panel,  
Click Lab Test and select  
"E2P\_MGMT".  
Click Lab Result and select  
"E2P\_HF (Manual, Text)".

**Important\*** Click **Save** and then click **OK**.



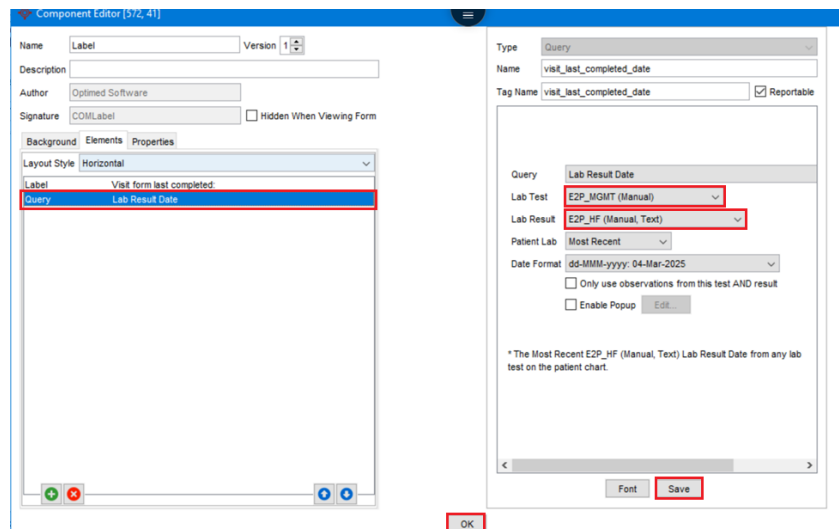
Following the red highlighted area, click: **"Visit form last completed:"**  
Right-click and select **Edit**.



On the left panel, select:  
**Query - Lab Result Date**

On the right panel,  
Click Lab Test and select  
"E2P\_MGMT".  
Click Lab Result and select  
"E2P\_HF (Manual, Text)".

**Important\*** Click **Save** and then click **OK**.



Click the area to the left of the red highlighted box titled: "**dxStatusHF (3)**".

Right-click on the blue area/textbox and select **Edit**.



The screenshot shows a software interface with a red highlighted box containing the text "Update status: ⓘ" followed by an empty white text input field. To the right of this box is a light red rectangular button with the text "<dxstatusHF (3)".

### dxStatusHF Step 1/3:

On the left panel, select:

#### Query – Lab Result

On the right panel,  
Click Lab Test and select  
"HF(E2P)".

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

#### Important\*

Click **Save** but **do not click**  
**OK.**

Proceed to **dxStatusHF Step**  
**2/3.**

Component Editor [5, 64]

Name: Diagnosis Version: 1.0

Description: Stratification by ejection fraction

Author: Optimed Software

Signature: COMLabel Hidden When Viewing Form: ☐

Background Elements Properties

Layout Style: Horizontal

Label: Diagnosis status

Query: Lab Result

Label: |

Query: Last updated: Lab Result Date

Label: |

Label: Update status: tip.png

TextField

Type: Query

Name: dxStatus

Tag Name: dxStatus Reportable: ☒

Query: Lab Result

Lab Test: HF (E2P) (Manual)

Lab Result: dxStatusHF (Manual, Text)

Patient Lab: Most Recent

☐ Only use observations from this test AND result

☐ Enable Popup Edit

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

Font Save

### dxStatusHF Step 2/3:

On the left panel, select:

#### Query – Lab Result Date

On the right panel,  
Click Lab Test and select  
"HF(E2P)".

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

#### Important\*

Click **Save** but **do not click**  
**OK.**

Proceed to **dxStatusHF Step**  
**3/3.**

Component Editor [5, 64]

Name: Diagnosis Version: 1.0

Description: Stratification by ejection fraction

Author: Optimed Software

Signature: COMLabel Hidden When Viewing Form: ☐

Background Elements Properties

Layout Style: Horizontal

Label: Diagnosis status

Query: Lab Result

Label: |

Query: Last updated: Lab Result Date

Label: |

Label: Update status: tip.png

TextField

Type: Query

Name: dxStatusDate

Tag Name: dxStatusDate Reportable: ☒

Query: Lab Result Date

Lab Test: HF (E2P) (Manual)

Lab Result: dxStatusHF (Manual, Text)

Patient Lab: Most Recent

Date Format: dd-MMM-yyyy; 04-Mar-2025

☐ Only use observations from this test AND result

☐ Enable Popup Edit

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

Font Save

### dxStatusHF Step 3/3:

On the left panel, select:

**TextField**

On the right panel,

Click Lab Test and select

**"HF(E2P)".**

Click Lab Result and select

**"dxStatusHF (Manual, Text)".**

**Important\*** Click **Save** and then click **OK**.

Click the area to the left of the red highlighted box titled: **"LVEF"**.

Right-click on the blue area/textbox and select **Edit**.

On the left panel, select:

**LabComboBox**

On the right panel,

Click Lab Test and

select **"HF (E2P)".**

Click Lab Result and select

**"LVEF (Manual, Text)".**

**Important\*** Click **Save** and then click **OK**.

Click the area to the left of the red highlighted box titled: **"NYHA"**.

Right-click on the blue area/textbox and select **Edit**.

### NYHA Step 1/3:

On the left panel, select:  
**Query – Lab Result**

On the right panel,  
Click Lab Test and select  
"HF(E2P)".

Click Lab Result and select  
"NYHA (Manual, Numeric)".

#### Important\*

Click **Save** but **do not click OK**.

Proceed to **NYHA Step 2/3**.

### NYHA Step 2/3:

On the left panel, select:  
**Query – Lab Result Date**

On the right panel,  
Click Lab Test and select  
"HF(E2P)".

Click Lab Result and select  
"NYHA (Manual, Numeric)".

#### Important\*

Click **Save** but **do not click OK**.

Proceed to **NYHA Step 3/3**.

### NYHA Step 3/3:

On the left panel, select:  
**TextField**

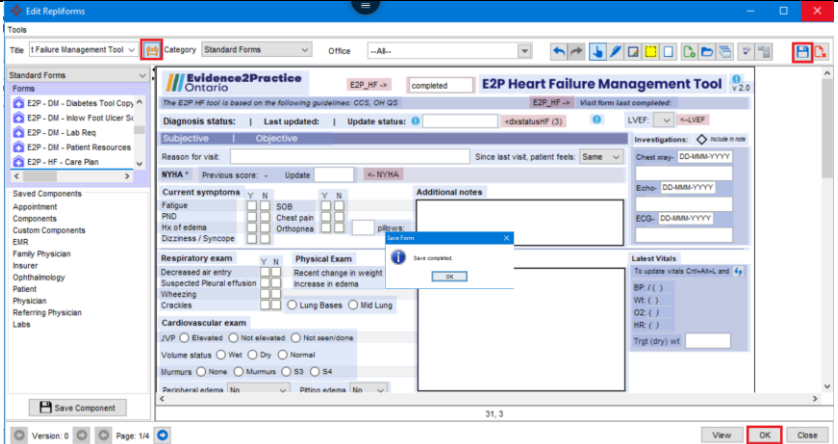
On the right panel,  
Click Lab Test and select  
"HF(E2P)".

Click Lab Result and select  
"NYHA (Manual, Numeric)".

**Important\*** Click **Save** and  
then click **OK**.



1. In the top left corner, click the **orange construction sign** to make it available; it will then turn blue.
2. Click on the top right **file button** to save.
3. The Safe Form window will open, click **"OK"** to save.



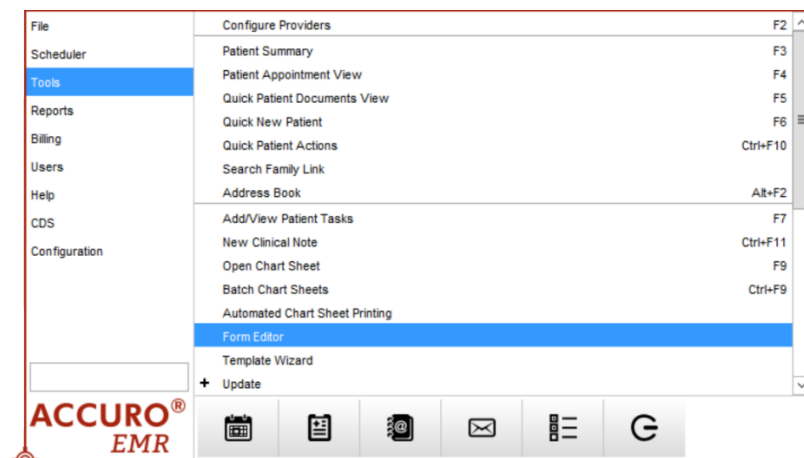
You are now ready to use the tool!

## New Tool Version Process

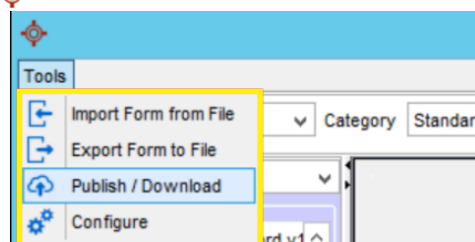
Once a new tool version has been released, please follow these steps to update the tool in your EMR. You might have been notified that a new version of the E2P heart failure tool is available via email.

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 – HF – Heart Failure Tool**” in the list.
3. Finally, click **Download** to import it into your Accuro EMR.

\*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.

[Please click here to provide feedback on this tool](#)

## Contact

If you have any questions or need support, please reach out to [EMRtools@amplifycare.com](mailto:EMRtools@amplifycare.com)!

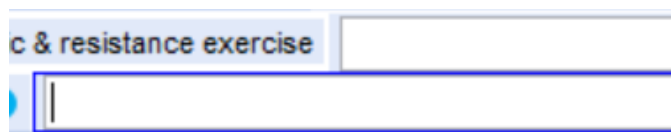
## Appendix

### Table of Contents

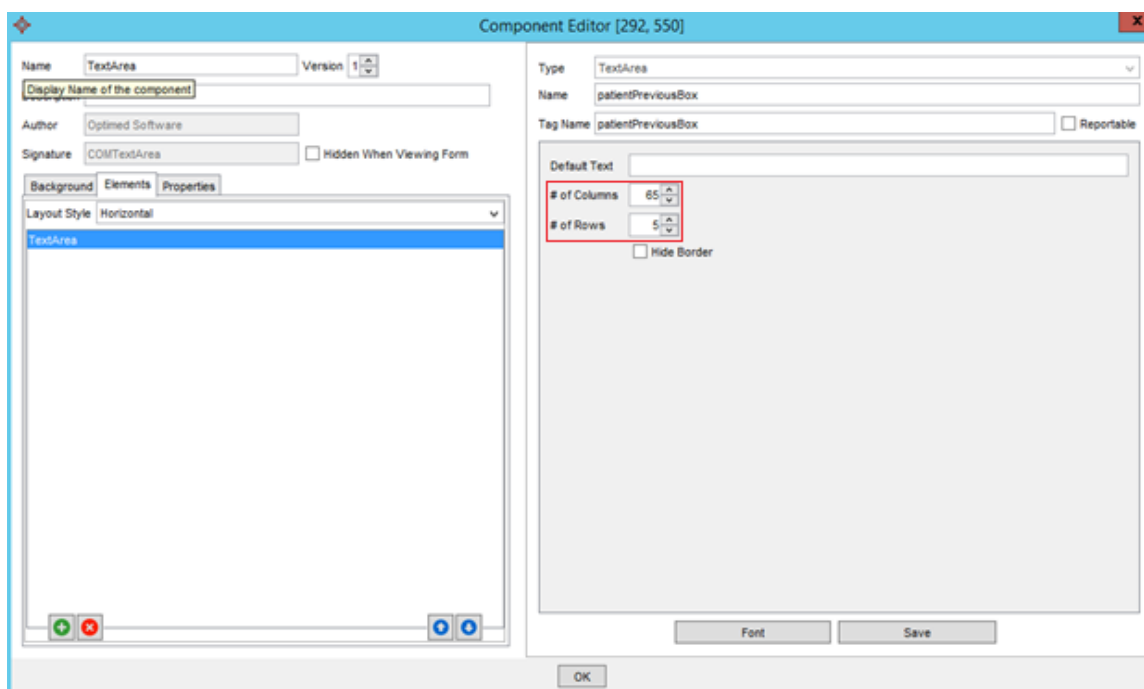
<a href="#">How to Change the Size of a Text Box.....</a>	<a href="#">13</a>
<a href="#">How to Change the orientation of the medication list .....</a>	<a href="#">14</a>
<a href="#">How to fix the checkboxes in the patient resources page .....</a>	<a href="#">15</a>

### 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.



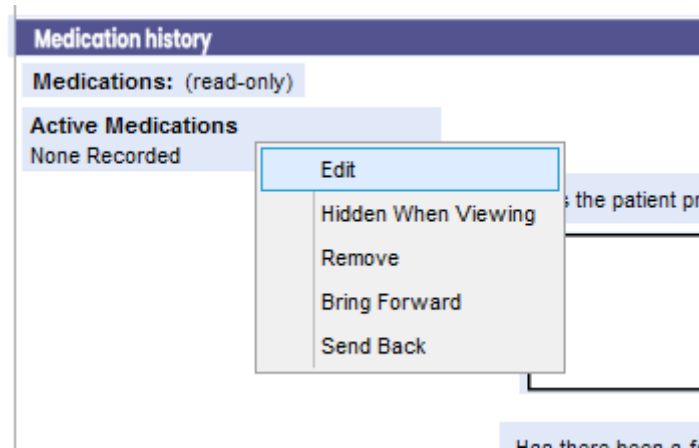
4. Options for editing the # of columns and # of rows which will change the size of the box are listed on the right of the screen.
  - a. We suggest noting the original dimensions of the areas you are editing in case you want to revert.



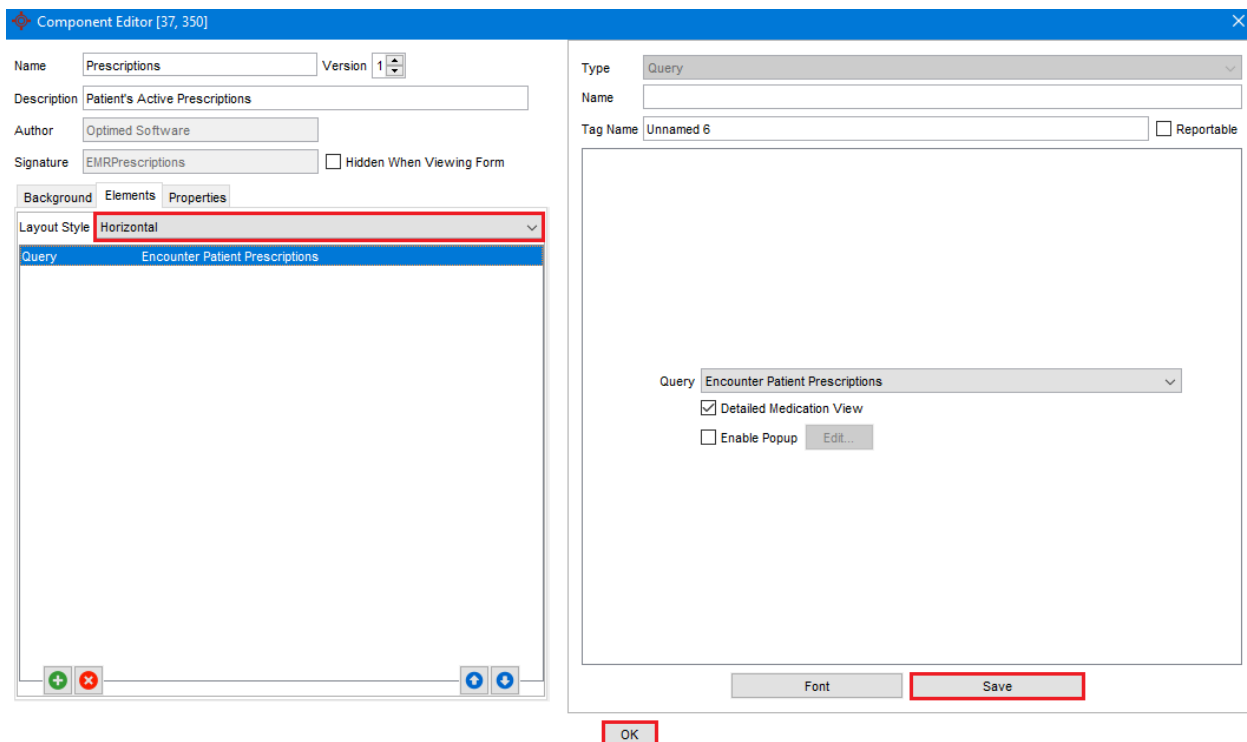
5. Once you are happy with the new dimensions, click **Save**, then **OK**.

## 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**.



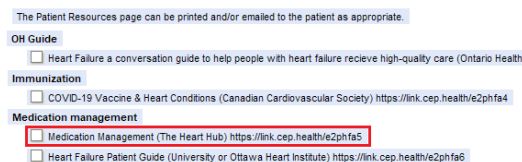
2. The default setting for the medication section is vertical. Horizontal and custom options are also available where the columns can be adjusted as needed.



3. Once you are happy with the new layout, click **Save**, then **OK**.

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

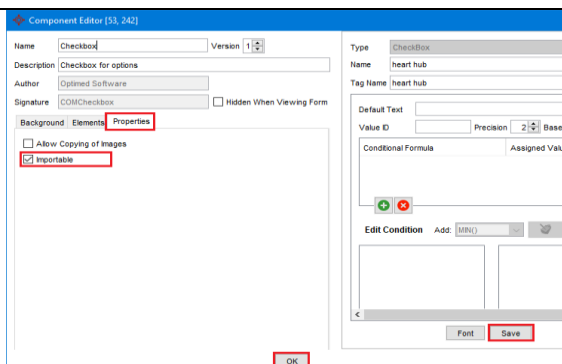
1. Navigate to the **Form Editor**.
2. Search for **E2P – HF – Patient Resources**, and double-click to open.
3. Navigate to the checkbox titled: **“Medication Management (The Heart Hub)”**, right-click and select **“Edit”**.



On the Left-hand side, click on **“Properties”**.

Check the checkbox titled **“Importable”**.

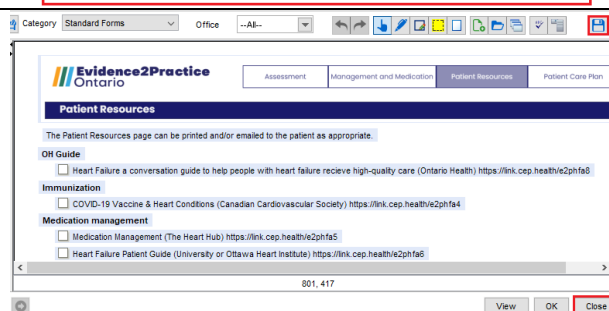
Click **Save**, then **OK**.



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.