

Preventive Care Toolbar

Customization Instructions

Version 3.3

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Developed by East Wellington Family Health Team

Supported by Amplify Care



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Exclude Screening Tests

The Prev Care button was designed to track the following screening tests: cervical cancer, breast cancer, colorectal cancer, and bone mineral densities. To tool can be set to exclude a particular screening test by taking the following steps:

- a. Open the patient Records window
- b. Select **“Settings”** then **“Edit Custom Forms”**
- c. Select the **“Prev Care – Summary”** form and click **“Edit Form”**
- d. Scroll right in the edit window to the hidden items sections
- e. Each of the screening tests have their own section.
- f. Click on the **“Show Test”** checkbox for the test to exclude



- g. In the property window for this item remove the checkmark beside the **“Checked”** property

| Name | Value |
|-----------------------|-------------------------------------|
| Font Name | Verdana |
| Size | 12 |
| Style | plain |
| Width | 164 |
| Required | <input type="checkbox"/> |
| Show Edit Text Border | <input checked="" type="checkbox"/> |
| Include In Printout | <input type="checkbox"/> |
| Compact Stamp Text | <input type="checkbox"/> |
| Graph As | |
| Graph Date Field Id | |
| Resource Name | |
| Tab Order | 0 |
| Radio Button | <input type="checkbox"/> |
| Checked | <input type="checkbox"/> |

- h. **Save** the form.
- i. The test will *no longer display* on the Prev Care Summary form, **for any user**.

Screening Test Search Criteria

The hidden items sections of the form described above include a set of search criteria for each of the preventive care screening tests. These are the criteria used to identify screening test reports that have been posted to the chart.

Due to the variability of how the tests are reported, a number of search criteria are needed to ensure that all of the test reports are identified. The criteria used for each test are specified in the “Patient Data” section in the hidden sections of the form described above.

These criteria can be edited as needed to ensure that all of the screening test reports are being found. Consult the PS Suite EMR Custom Forms Guide for more information on editing these items. Extreme care should be taken when changing these criteria as it could result in test reports being missed or falsely identified.

Cervical Show Test

Patient Data (Hidden)

Pap Smear

| | |
|------------|--|
| Lab Value | pat.Lab_Values.Pap_Smear_[Pap_Smear].date_of_latest |
| Lab Report | pat.Diagnostic_Test_Reports.Pap_Test_Report.date_of_latest |
| Lab Text 1 | pat.Lab_Text.Lab_Text_Containing"Cervical_pap_smear".date_of_latest |
| Lab Text 2 | pat.Lab_Text.Lab_Text_Containing"Liquid_based_pap".date_of_latest |
| Lab Text 3 | pat.Lab_Text.Lab_Text_Containing"transformation_zone".date_of_latest |
| Lab Text 4 | pat.Lab_Text.Lab_Text_Containing"papanicolaou".date_of_latest |

HPV

| | |
|-------------|--|
| Lab Value | pat.Lab_Values.Human_Papilloma_Virus_[HPV].date_of_latest |
| Lab Report | ...nastic_Test_Reports.Misc_Diagnostic_Test_containing"HPV".date_of_latest |
| Lab Text 5 | pat.Lab_Text.Lab_Text_Containing"Liquid_Based_HP_V".date_of_latest |
| Lab Text 6 | pat.Lab_Text.Lab_Text_Containing"HPV_Cervical".date_of_latest |
| Lab Text 7 | pat.Lab_Text.Lab_Text_Containing"HPV_Cervical".date_of_latest |
| Lab Text 8 | pat.Lab_Text.Lab_Text_Containing"HPV_Type:".date_of_latest |
| Lab Text 9 | pat.Lab_Text.Lab_Text_Containing"HPV_Screen:".date_of_latest |
| Lab Text 10 | pat.Lab_Text.Lab_Text_Containing"Aptima_HP_V".date_of_latest |
| Lab Text 11 | pat.Lab_Text.Lab_Text_Containing"high-risk_HP_V".date_of_latest |
| Lab Text 12 | pat.Lab_Text.Lab_Text_Containing"High-Risk_HP_V:".date_of_latest |
| Lab Text 13 | pat.Lab_Text.Lab_Text_Containing"High-Risk_HP_V:".date_of_latest |

Default Settings

The default settings for each screening test are specified in the hidden “Criteria Data” section of the form. They can also be edited as needed.

Criteria Data (Hidden)

| | | | | | | | | | | | | | |
|---|---|--|-----------|-----|--------|------|---|-----|--|-----------|-----|--------|------|
| Criteria 1: Gender | Female | | | | | | | | | | | | |
| Criteria 2: Age | 25 To 69 | | | | | | | | | | | | |
| Criteria 3: Treatment | Cervix present (no hysterectomy) | | | | | | | | | | | | |
| Search Criteria: Treatment | List Exclusion Criteria in Items in lowercase | | | | | | | | | | | | |
| Frequency Criteria | | | | | | | | | | | | | |
| <table><tr><td>Pap Smear</td><td></td></tr><tr><td>Test Type</td><td>Pap</td></tr><tr><td>Due in</td><td>3 yr</td></tr></table> | Pap Smear | | Test Type | Pap | Due in | 3 yr | <table><tr><td>HPV</td><td></td></tr><tr><td>Test Type</td><td>HPV</td></tr><tr><td>Due in</td><td>5 yr</td></tr></table> | HPV | | Test Type | HPV | Due in | 5 yr |
| Pap Smear | | | | | | | | | | | | | |
| Test Type | Pap | | | | | | | | | | | | |
| Due in | 3 yr | | | | | | | | | | | | |
| HPV | | | | | | | | | | | | | |
| Test Type | HPV | | | | | | | | | | | | |
| Due in | 5 yr | | | | | | | | | | | | |

Edit the Requisition Form Lists

Edit Custom Forms

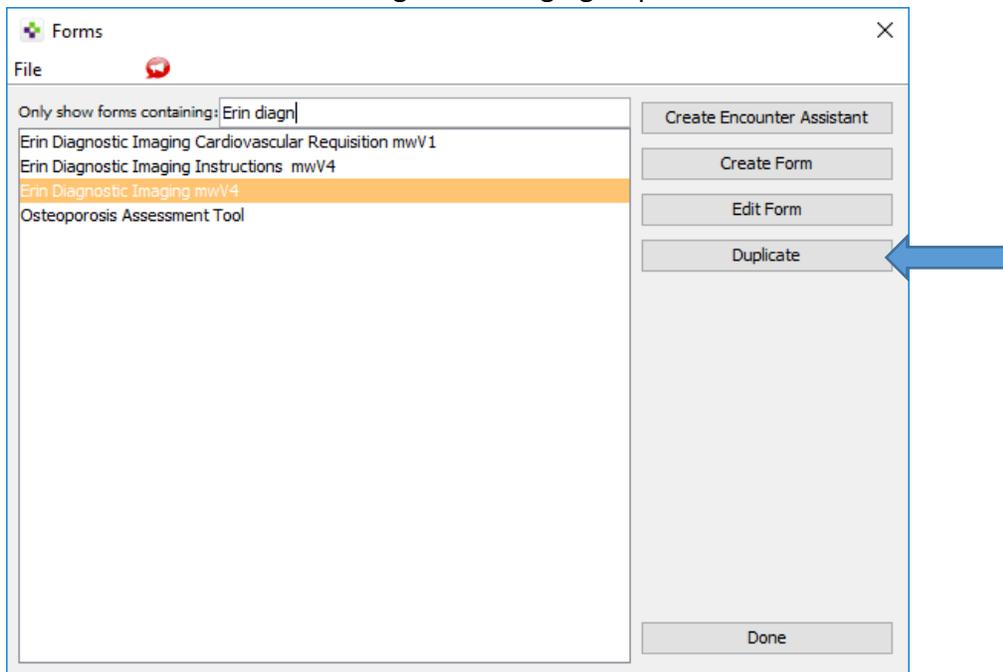
On the Prev Care Summary form, when the user adds a response that involves a requisition, you can set it up so that they can simply choose from a list of requisitions that they commonly use. For example, if the patient is due for a mammogram, the user clicks 'Add' then 'Requisition' and then selects the particular mammogram form that they need.

There are four main Prev Care Requisition forms

- Prev Care - BMD Requisition Forms
- Prev Care - Breast Requisition Form
- Prev Care - Cervical Requisition Forms
- Prev Care - Colorectal Requisition Forms

If desired, the requisition forms opened can have the screening test required already checked off. To do this you will need to create a separate form for each type of test at each location. So, for example, if there are 5 places where you could send a patient for a mammogram, you will need 5 separate forms, one for each location, and each form should already have the required test already checked off by default. Each form should be named so that it is easy to know exactly what it is for (ex. "Erin Diagnostic Mammogram Req").

- In the Records window once again **select** *Settings* → *Edit Custom Forms...*
- Select one of the common diagnostic imaging requisition forms that are used and **click** *Duplicate*



- Name the duplicate requisition form with the specific screening test you want ordered on it (ex. Erin Diagnostic Imaging can be duplicated and named as "Erin Diagnostic Imaging – Mammo")
- In the edit view of the form **select** the *screening test item*

e. Click the "Checked" property to check off the item

MAMMOGRAPHY & BREAST IMAGING
(By Appointment only)

Mammography R L Both
 Breast Ultrasound R L Both

Previous Scan Yes No

Date : _____ Location : _____

| | |
|-----------------------|-------------------------------------|
| Required | <input type="checkbox"/> |
| Show Edit Text Border | <input checked="" type="checkbox"/> |
| Include In Printout | <input checked="" type="checkbox"/> |
| Compact Stamp Text | <input type="checkbox"/> |
| Graph As | |
| Graph Date Field Id | |
| Resource Name | |
| Tab Order | 0 |
| Radio Button | <input type="checkbox"/> |
| Checked | <input checked="" type="checkbox"/> |
| Diameter | 6 |
| Keyword for Selection | |
| Event Triggered | |
| Custom Height | 4 |
| Toggle Group Name | |
| Draw the Border | <input type="checkbox"/> |

f. Save the form

Once you have created a set of forms, follow the instructions below to program them into the Prev Care Requisition Forms form.

a. In the Records window select *Settings* → *Edit Custom Forms...* → select *Prev Care - BMD Requisition Forms* → click *Edit Form*

Forms

File

Only show forms containing: prev care]

- Opioid - Clinical Opiate Withdrawal Scale (COWS)
- Prev Care - BMD Criteria
- Prev Care - BMD Requisition Forms
- Prev Care - BMD Response
- Prev Care - Breast Criteria
- Prev Care - Breast OBSP Information
- Prev Care - Breast Requisition Forms**
- Prev Care - Breast Response
- Prev Care - Cervical Criteria
- Prev Care - Cervical Requisition Forms
- Prev Care - Cervical Response
- Prev Care - Colorectal Criteria
- Prev Care - Colorectal FIT Information
- Prev Care - Colorectal Post Polypectomy Surveillance
- Prev Care - Colorectal Requisition Forms
- Prev Care - Colorectal Response
- Prev Care - Screening Tests
- Prev Care - Summary
- Preventive Care Summary Report Criteria
- PSS Toolbar Template 2019
- QBIC Chronic Obstructive Pulmonary Disease COPD
- OBIC Chronic Obstructive Pulmonary Disease COPD_EA version

Create Encounter Assistant

Create Form

Edit Form

Duplicate

Done

b. In the form editor window **select** the first form item on the list

File Edit Custom Form

Select BMD requisition form:

- Custom Form Title Here
- eReferral Example

- c. **Edit** the item's *Resource* or *Text* property of the item so it displays the name of which requisition custom form you want opened when the item is clicked (e.g. "Erin Diagnostic Imaging – Mammo")

| | |
|-----------------------|------------------------|
| Text | Custom Form Example |
| Font Name | |
| Size | |
| Style | |
| Width | |
| Required | |
| Show Edit Text Border | |
| Include In Printout | |
| Compact Stamp Text | |
| Graph As | |
| Graph Date Field Id | |
| Resource Name | Custom Form Title Here |

OR

- d. Repeat the above steps for other requisition forms needed. The items listed can be deleted, or copied and pasted in the list, if a different number of requisition forms are required. See below for an example of a finalized form:

✚ Edit Prev Care - Breast Requisition Forms

File Edit Custom Form 

Select mammogram requisition form:

- [Credit Valley Diagnostic Centre](#)

- [Grand River Breast Cancer DAP](#)

- [Guelph General Hospital](#)

- [Guelph Medical Imaging](#)

- [Halton Healthcare Services](#)

- [Headwaters Healthcare Centre](#)

- [Louise Marshall Diagnostic Imaging](#)

- [Milton Diagnostic Imaging](#)

- [Orangeville Medical Imaging](#)

- e. Save the form
- f. Repeat steps a to e for each of the 3 other Prev Care Requisition Forms

Editing eReferral Links

For sites who have enabled eReferrals through the Cognisant MD's Ocean platform, you can link directly to a referral site on the Ocean Health Map.

a. Go to the eReferral's listing on Ocean's Health Map, **hover over** the site's title to obtain a code:



The screenshot shows a web browser window with the URL <https://ocean.cognisantmd.com/referrals/NewReferral.html?si>. The page header includes the Ocean eReferral Network logo and a search bar. The main content area displays a listing for the Waterloo Wellington Coordinated Colonoscopy Access Program, in partnership with Cancer Care Ontario. The listing includes the address 835 King St W, Kitchener, ON N2G 1G3, phone numbers 519-749-4370 x2974 and 519-749-4232, and the language English. A red box highlights the code `regional_colonoscopy-17271512` next to the program title.

b. **Edit** the item's *Resource* to be the code you obtained from the Ocean Health map (i.e. "regional_colonoscopy-17271512")

c. Repeat steps a and b for each item you would like to link to an eReferral page.