# **Preventive Care Toolbar**

# Installation Instructions

Version 3.3 Last Updated: May 6, 2025

Developed by East Wellington Family Health Team Supported by Amplify Care



### ATTENTION

Installation requires a basic knowledge of custom forms editing and a custom forms editing license. The PS Suite EMR Custom Form Guide can be found in the online help for the EMR.

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## Import the Custom Forms

- a. Download the package of PSS custom forms to a folder on your computer.
- b. Open PSS and select Records



### c. In the Record window select Settings then Edit Custom Forms

#### 🔹 QIDSS Hope Latam - PSS

File Edit Style Settings Patient View Data Letter OLIS

Choose Patient->	Edit Stamps	
Ĥ	Edit Custom Forms	
8	Edit Searches	
PH	Edit Cohorts	
A L L R	Edit Reminders	
	Edit Reminders of This Patient	
R E M	New Quick Individual Reminder	
	New Alert	
	Increase Text Size C	trl+↑
	Decrease Text Size C	trl+↓

### d. Select File then Import Form(s)

	New Custom Form	Ctrl+N			Create Encounter Assistant
	New Encounter Assistant	Ctrl+Shift+N		^	
	Edit Form	Ctrl+E			Create Form
	Rename Form	Ctrl+R			Edit Form
	Duplicate Form	Ctrl+D			Duplicate
	Deactivate Form				
	Import Form(s)				
	Export Form(s)				
	Show Revision History				
	Show Deactivated Forms				
	Restore from Automatic Save	2			
Arth	ritis Referral (CART) Brampton m	wV2	2		
Arth	ritis Rehab Referral (ks)				
Asth	ma Control Questionnaire kshlV1				
Atria	al Fibrillation Handouts			. T	Done

e. Locate the folder where you downloaded the form files, select them all and click "Choose".



The forms will import. Click **OK** if prompted to update any of the forms that are being imported.

Importing custom forms	🔹 Cus	tom Form Import	×
Cancel	1	Importing custom forms Cancel	

If you have previously been using the Prev Care Toolbar or Prev Care button, the update should be complete. Otherwise, follow the remaining instructions to continue the installation.

# Create a Reminder to show the Toolbar

### a. In the Records window select Settings -> Edit Reminders

QIDSS Hope Latam - PSS								
File	Edit	Style	Settings	Patient	View	Data Letter	OLIS	
Choo	se Pat	ient->ł	Edi Edi Edi Edi	t Stamps t Custom t Searche t Cohorts	 1 Form 25	s		
	Edit Reminders							
			Edi Ne Ne	t Remind w Quick w Alert	lers of Individ	This Patient ual Reminder		
			Inc	rease Tex	t Size		Ctrl+↑	
			De	crease Te	xt Size		Ctrl+↓	

### b. Select New Reminder

📀 Edit Reminders		×
Edit		
Enter filter text		
Reminders		
Cournedin Truants  Current Smoker Toolbar Diabetes K03DA not done in last 1 Diabetes Toolbar Diabetic Foolbar Diabetic Foolbar		
Diabetic Foot Screen every 3 Months Diabetic Foot Screen every 6 Months Diabetic Foot Screen every 6 Months Diabetic Foot Screen Yearly		
EWFHT Toolbar - Other Users EWFHT Toolbar - Other Users EWFHT Toolbar - Other Users, wit		
Flu shot - general population Flu Shot over 65 for Fall 2011 Hb 1r		
Health Links Referral Toolbar Health Links Toolbar Health Links Toolbar		
HPV Gardasil males 9 to 26 years HPV Gardasil males 9 to 26 years 1 HPV Gardasil males 9 to 26 years 2		
HPV Gardasil women 9 - 45years HPV Gardasil women 9 - 45years 1		
Show Intervention as Reminder:		
O Show Custom Form or Stamp: N/A		$\sim$
Priority: High (scan daily)	O Medium (reminder report)	O Low (next visit)
Delete Reminder	New Reminder	Done

- c. Add a Reminder and give it a name such as "Prev Care Toolbar"
- d. To make the toolbar appear for patients who are at least 18 years old, click "Add Line" then add the following line:

1	Add Search Criterion				
	Demographics Patient Profile	Additional Information Address Line 2	^	= >	18
	Visits	Age		>=	
	Vitals Immunizations	Age in Months Birth Date		< <=	
	Treatment	Birth Date Estimated			
	Allergies	Block Fee Expiry Date			

e. To make the tool user specific click "Add Line" then add the user as shown here:

🔹 Edit Search Criterion			
Edit Search Criterion  Demographics Patient Profile Visits Visits Vitals Immunizations Treatment Allergies CPP Problems CPP Past Medical History	Current Doctor Initials Current User's Role Current User Initials Today's Date	contains contains the word does not contain the word does not contain is is not is empty is not empty starts with	ww
CPP Past Medical History CPP Family History CPP Risk Factors Lab Values Lab Text Diagnostic Imaging Diagnostic Test Reports Consultation Report Miscellaneous Letters Medical Report		starts with ends with	
Custom Forms Cohorts Pending Tests/Consults Bills Appointments All Text Notes Other Restrictions Nested Reminder Scoring			

- f. Click 'Ok'
- g. Repeat steps d to f to activate the toolbar for other users (or even add a line for a specific user role).Use the "or" operator to connect each line and indent them as shown here:

🔹 Edit Reminders	
Edit 😡	
prev care 3.0	Reminder Name: Prey Care 3.0 Toolbar
Peminders ^	
Prev Care 3.0 Toolbar	and
	Current User Initials is KS
	or
	Current User Initials is JWW

h. Once the users have been specified, select the "Show Custom Form or Stamp" button near the bottom and select the Prev Care Toolbar in the dropdown

<ul> <li>Show Interv</li> </ul>	ention as Reminder:			
Show Custor	m Form or Stamp: EWFHT P	SS Toolbar Template - v3.0		~
Priority:	<ul> <li>High (scan daily)</li> </ul>	<ul> <li>Medium (reminder report)</li> </ul>	O Low (next visit)	<ul> <li>Ignore (do not evaluate)</li> </ul>
Delete Rem	inder	New Reminder		Done

i. Click Done in the bottom right corner

The toolbar will now display in all patient charts for the users specified. Note that the Prev Care button will not appear in patient charts where the patient is under the age of 18.

# Adding Buttons to the Toolbar

The toolbar shared in this package must be the one used in order for the Prev Care button to work.

Buttons from other existing toolbars—created using the TELUS Toolbar Template (2019 or earlier) or a previous version of the Prev Care Toolbar—can be pasted into the red section of the form. Additionally, new buttons can be created directly within the form, just as with the PS Toolbar Template.

