

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

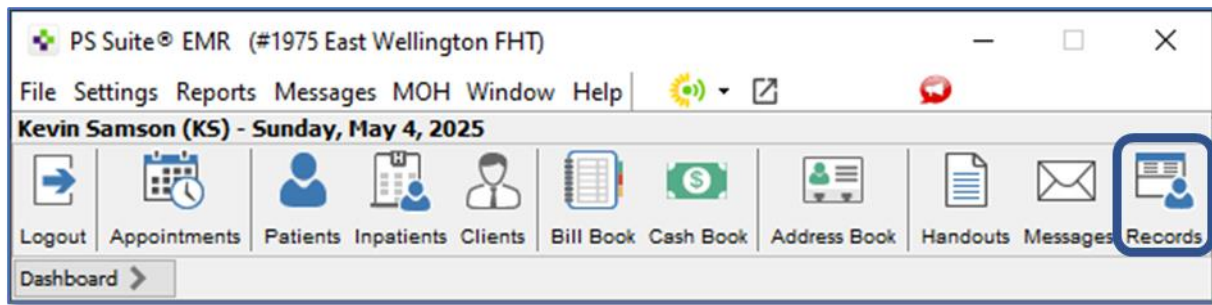
Installation requires a basic knowledge of custom forms editing and a custom forms editing license. The PS Suite EMR Custom Form Guide can be found in the online help for the EMR.

Contents

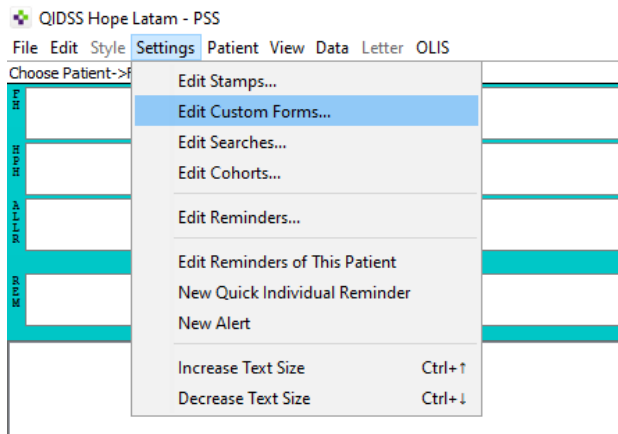
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Import the Custom Forms

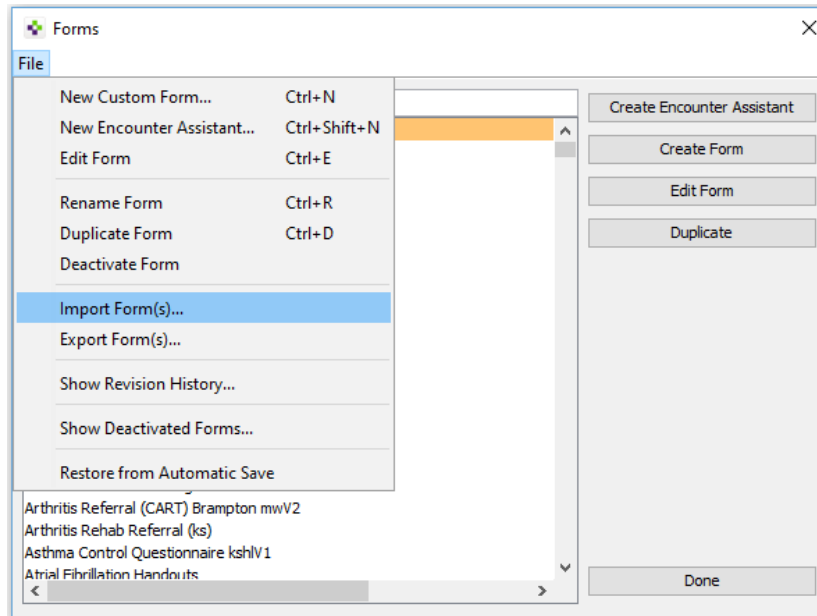
- Download the package of PSS custom forms to a folder on your computer.
- Open PSS and select Records



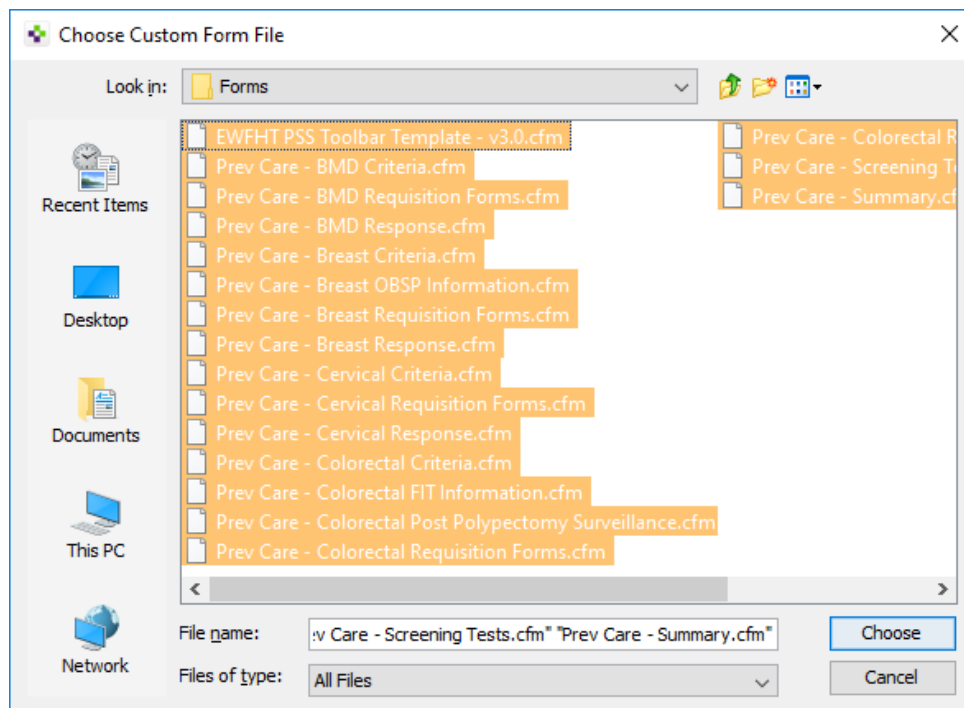
- In the Record window select **Settings** then **Edit Custom Forms**



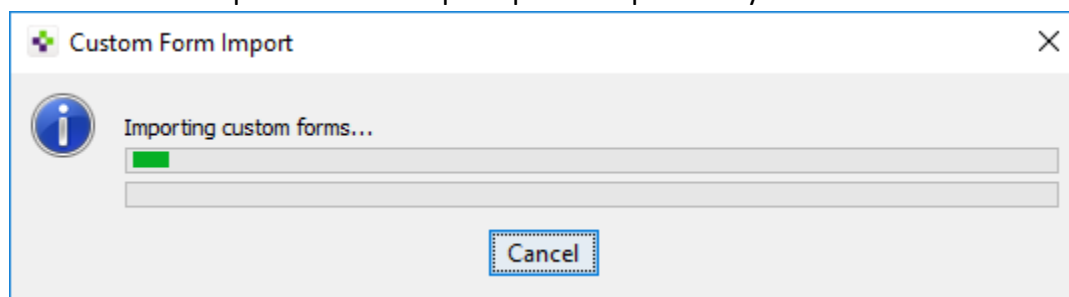
- Select **File** then **Import Form(s)**



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



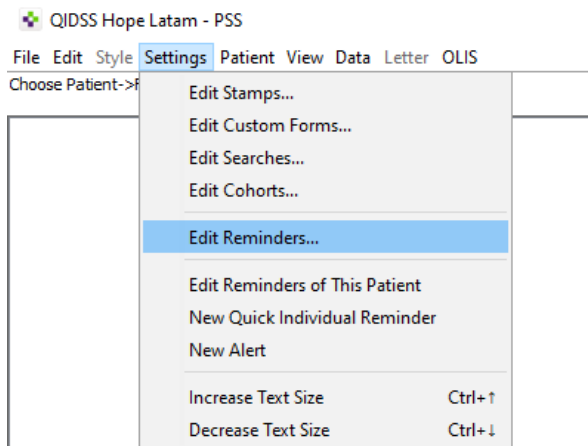
The forms will import. Click **OK** if prompted to update any of the forms that are being imported.



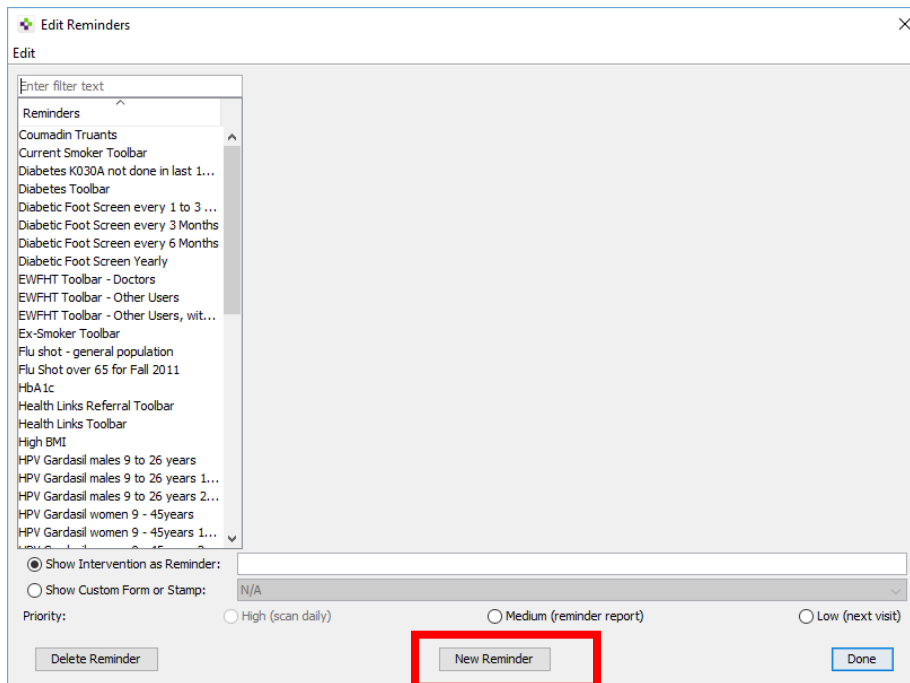
If you have previously been using the Prev Care Toolbar or Prev Care button, the update should be complete. Otherwise, follow the remaining instructions to continue the installation.

Create a Reminder to show the Toolbar

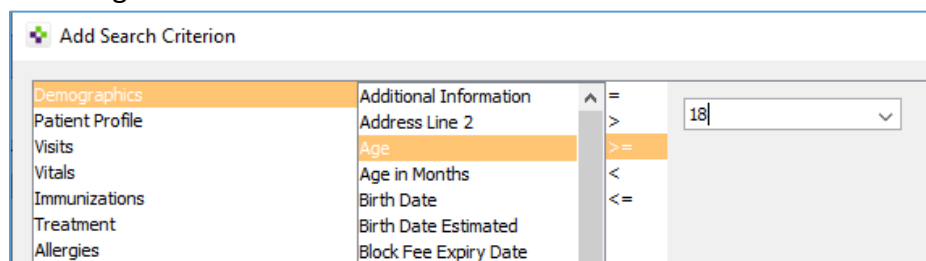
- a. In the Records window select Settings -> Edit Reminders



- b. Select New Reminder



- 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:



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

Criterion	Operator	Value
Current Doctor Initials	contains	JWW
Current User's Role	contains the word	JWW
Current User Initials	does not contain the word	JWW
Today's Date	does not contain	JWW
is	is	JWW
is not	is not	JWW
is empty	is empty	JWW
is not empty	is not empty	JWW
starts with	starts with	JWW
ends with	ends with	JWW

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:

Reminder Name: Prev Care 3.0 Toolbar

Age >= 18
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

Show Custom Form or Stamp: EWFHT PSS Toolbar Template - v3.0

Priority: ☐ High (scan daily) ☒ Medium (reminder report) ☐ Low (next visit) ☐ Ignore (do not evaluate)

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.

