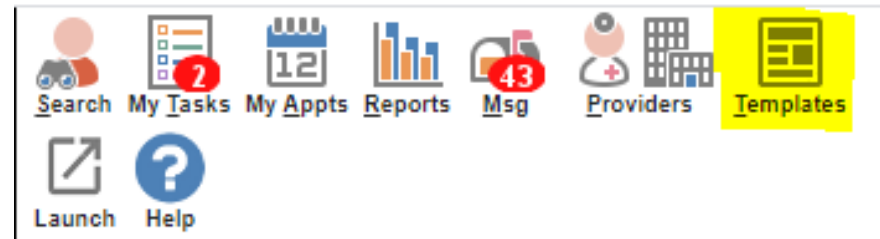Practice 360: COPD Toolset – Preparing Your EMR

Accessing the Template Library

1

Click the "Templates" icon on the upper right of your dash board

2

Accessing the Template Library

Navigate to the permissions tab in the applicable user profile, select "General" and ensure that "Template Admin" is activated for the user.
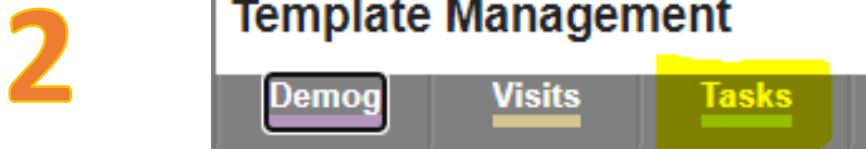

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How to Favorite Task Templates

1

Click the "Tasks" icon on the horizontal list of template types

2

Template Management

Demog   Visits   **Tasks**

3

Specify "Visit" in the Category field and Search for "COPD" in the Template Name field

4
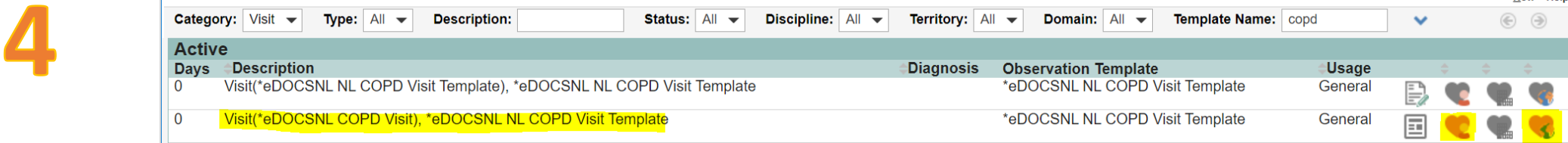
5

Click the heart icon to the right to favorite a template. The left heart favorites it for you only, the right heart favorites the template for your clinic
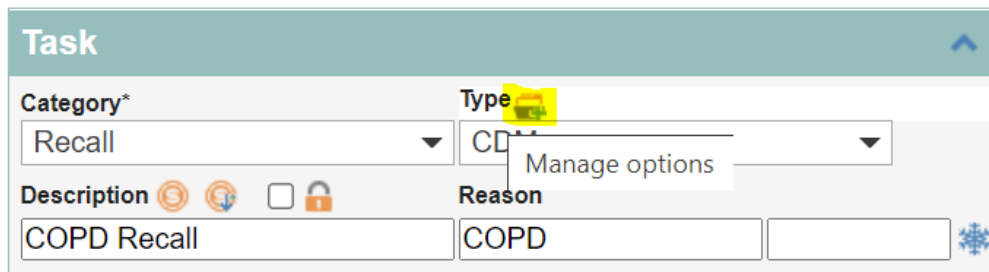
6

Task Templates

| Category: | Visit | Type: | All | Description: | | Status: | All | Discipline: | All | Territory: | All | Domain: | All | Template Name: | copd | | | |

Active

Days	Description	Diagnosis	Observation Template	Usage				
0	Visit(*eDOCSNL NL COPD Visit Template), *eDOCSNL NL COPD Visit Template		*eDOCSNL NL COPD Visit Template	General				
0	Visit(*eDOCSNL COPD Visit), *eDOCSNL NL COPD Visit Template		*eDOCSNL NL COPD Visit Template	General				

New   Help

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Task Templates to Favorite

eDOCSNL NL COPD Visit Template
Pulmonary Function Test EH
Pulmonary Function Test LGH
Pulmonary Function Test CH
Pulmonary Function Test WH
Pulmonary Rehabilitation
COPD Referral for Pulmonary Rehab
COPD Recall
COPD Respirology Referral
Smoker's Help Line
Referral for Supplemental O2
RPM Program Referral
Influenza Vaccine for COPD Patients
Pneumococcal Polysaccharide Vaccine for COPD Patients
Pneumococcal Conjugate Vaccine for COPD Patients
Pharmacy Consult for Medication Review and Education
COPD Action Plan

Activating Types

1 Hover over the word "Type" in a task and click the folder icon that appears

2

3 Ensure that "Active" is selected for the types in the following slides.

4

Activating Types

1 Locate the "COPD Respirology Referral" Template and activate the following type:

Remote Patient Monitoring	☑
Respirologist ✓	☑
Supplemental O2 ✓	☑
Pulmonary Services ✓	☑
Smokers' Helpline ✓	☑

Activating Types

1 **Locate the Profile Item "Smoker, Tobacco Products by searching under the "Profile" tab in the Template library**

2

Current	Smoker	Tobacco products

3 **Activate the following types:**

Name	Active
Marijuana	✔
No inhaled substances	✔
Vaping	✔
Ex-Smoker <= 5 years	✔
Ex-smoker > 5 years	✔
Non-smoker	✔
Smoker	✔
Vaping with Nicotine	✔
Vaping without nicotine	✔
Narcotic	✔
Alcohol	✔
Drug Use	✔

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Activating Types

Find the "Pulmonary Function Test EH" referral and activate the following type:

Pulmonary Function Test ☑

Activating Types

Find the "COPD Action Plan" attachment and activate the following type:

COPD Action Plan ☑   ☑

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Activating Types

Find the "eDOCSNL COPD Recall" template and activate the following type:

Description

Name | Active
CDM | ☑

Activating Types

Go to the "Influenza Vaccine for COPD Patients"
Template and favorite the following types:

Influenza Vaccine ☑

Pneumococcal Conjugate ☑

Pneumococcal Polysaccharide ☑

Configuring user profiles for Goals

Navigate to the permissions tab in the applicable user profile, select "other" and ensure that Goals are activated for the user.

Favoriting the eDOCSNL Sidebar with Goals

1 Navigate to the dashboards tab under the template menu.

2
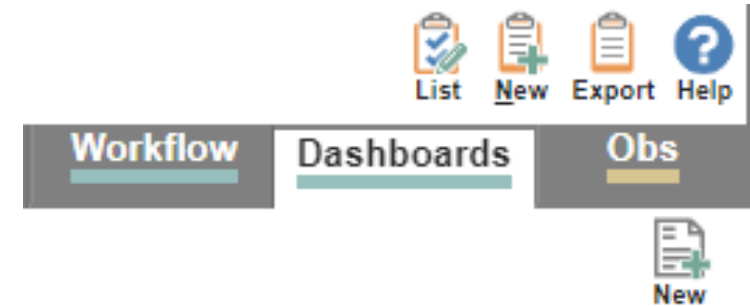
3 Select the type "Sidebar", locate the NL CPP Sidebar and favorite it either for yourself or the clinic using the appropriate heart icon.

4

Adding goals to the sidebar

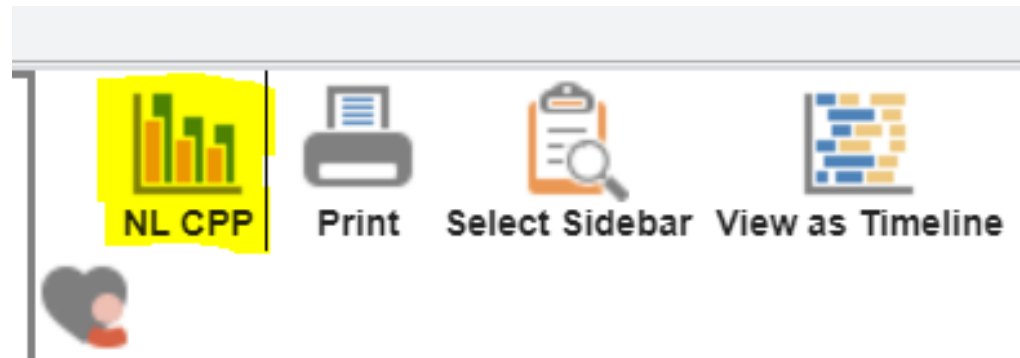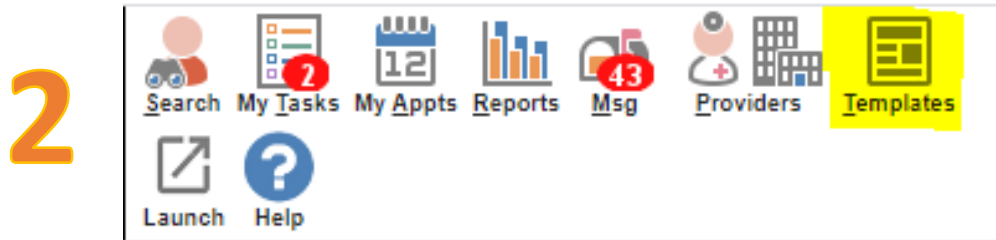**Once favorited, the sidebar will appear as selectable on the top of your existing sidebar, simply click it to make it appear.**

Alternatively, you can use <u>any</u> sidebar that has goals.

Ensure the Care Plan is Active

1 Click the "Templates" icon on the upper right of your dash board

2

3 Click the "List" icon in the upper right corner to see a list of care plans in your EMR instance

4

eDOCSNL COPD Care Plan, Care Plan

5 Click the name of the care plan (in this case it will be called the "eDOCSNL COPD Care Plan" and change status to "Active" under the Demographics tab and Click "Save"

6

Demographics Last CR Verified:

Create Care Plan

Care Plan Name | Status
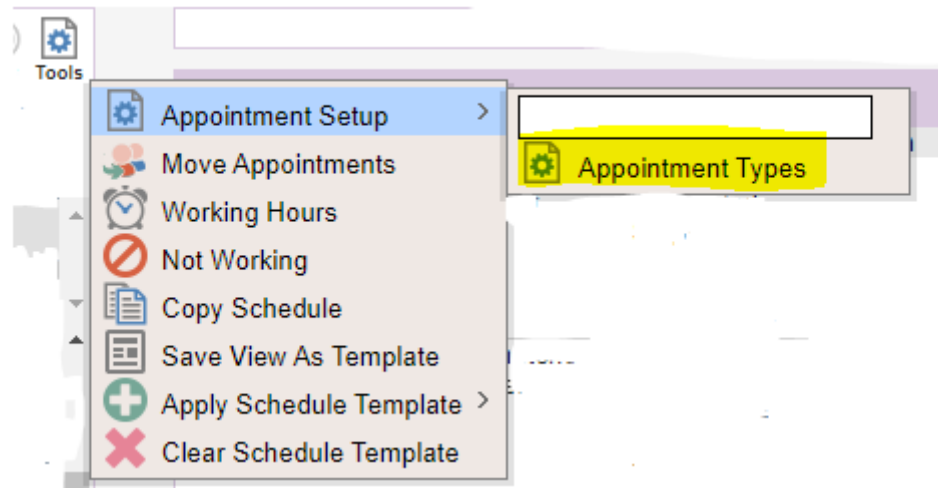eDOCSNL COPD Care F | Active

Save

Making an Appointment Type for COPD Management

1 In the upper right corner of your daysheet right click the "tools" icon, hover over "Appointment Setup" and Select "Appointment Types"

3 Select "New" in the upper right corner

2

4

Setting up the Appointment Type

Field	Value
Name*	eDOCSNL NL CDM: COPD
Duration*	30 (minutes)
Sort Order	0
Colour	Light Periwinkle
Can't Overlap	☐
Max Per Day	4
Multi-Patient Appointment	☐
Active	☑
Virtual Visit	☐
Self-Bookable	☐
Edit Privilege	Public
Use Privilege	Public
Resource	
Equipment	
Room	
Facility	✖
Billing Template	
Task Template	
Visit Template	*eDOCSNL NL COPD Visit Template
Workflow Step	
Concern	
Appointment Notes	
Critical	☐

1 Specify a name for the appointment type. Make it meaningful.

2 Specify how long you want this appointment to be scheduled for

3 Make sure the appointment type is set to "Active" or you won't be able to use it

4 In the edit and use privilege fields you can restrict the use and ability to edit to specific staff members or leave public.

5 Attach the template by selecting from the list that appears by clicking "Visit Template".

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Thank You