



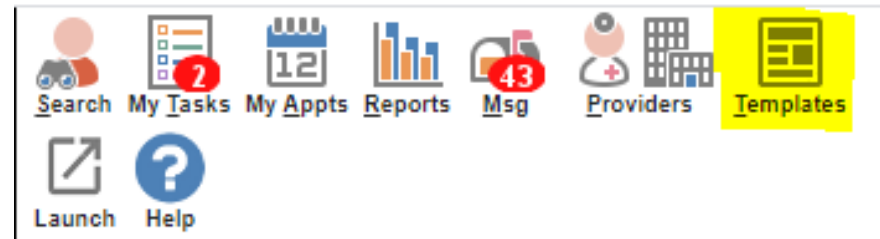
Practice 360: COPD Toolset – Preparing Your EMR

# 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.

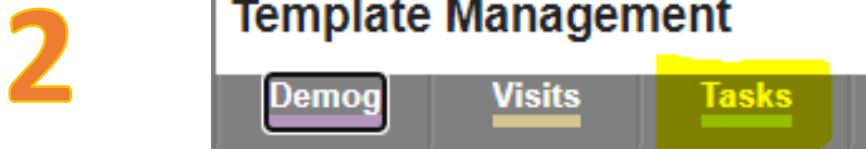
The screenshot displays the user profile management interface. The top navigation bar includes tabs for General, Groups, Passwords, Macros, Signing Options, Preferences, Filters, Templates, Workflows, Features, Permissions, and Contra Preferences. The 'Permissions' tab is active, and its dropdown menu is open, showing 'General' as the selected option. Below the navigation bar, there are links for 'Preferred Mgmt' and 'History'. The main content area is divided into two panels. The left panel, titled 'General Permissions', shows a 'Security Admin Level' dropdown set to 'Site'. It contains a table with columns for 'Permission', 'Allow', and 'Deny'. The 'Template Admin' permission is highlighted in yellow and is set to 'Allow'. The right panel, titled 'Privilege', contains a table with columns for 'Privilege', 'Allow', and 'Deny'. It lists various privileges such as 'Site Audit Log', 'Report Privilege', 'Billing Report Privilege', 'Print Privilege', 'Merge Privilege', 'Batch Privilege', 'Create/Edit Providers and Facilities', 'Inactivate Providers/Facilities', 'Save As Template', and 'Add/Remove Group/Location Favorites'. All these privileges are set to 'Allow'.

Permission	Allow	Deny
Application Admin	<input checked="" type="radio"/>	<input type="radio"/>
Template Admin	<input checked="" type="radio"/>	<input type="radio"/>
Signs For Self	<input checked="" type="radio"/>	<input type="radio"/>
Signs For Others	<input checked="" type="radio"/>	<input type="radio"/>
May Change Default	<input checked="" type="radio"/>	<input type="radio"/>

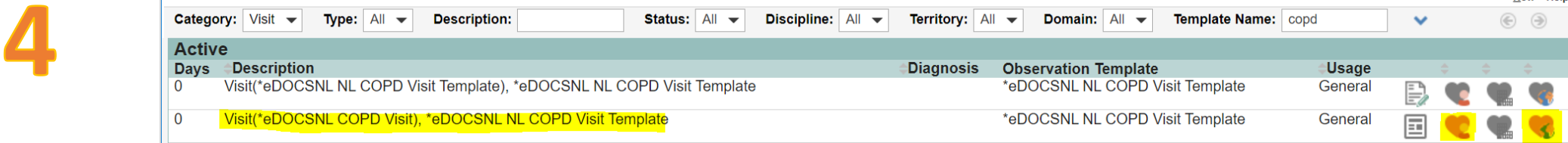
Privilege	Allow	Deny
Site Audit Log	<input checked="" type="radio"/>	<input type="radio"/>
Report Privilege	<input checked="" type="radio"/>	<input type="radio"/>
Billing Report Privilege	<input checked="" type="radio"/>	<input type="radio"/>
Print Privilege	<input checked="" type="radio"/>	<input type="radio"/>
Merge Privilege	<input checked="" type="radio"/>	<input type="radio"/>
Batch Privilege	<input checked="" type="radio"/>	<input type="radio"/>
Create/Edit Providers and Facilities	<input checked="" type="radio"/>	<input type="radio"/>
Inactivate Providers/Facilities	<input checked="" type="radio"/>	<input type="radio"/>
Save As Template	<input checked="" type="radio"/>	<input type="radio"/>
Add/Remove Group/Location Favorites	<input checked="" type="radio"/>	<input type="radio"/>

# How to Favorite Task Templates

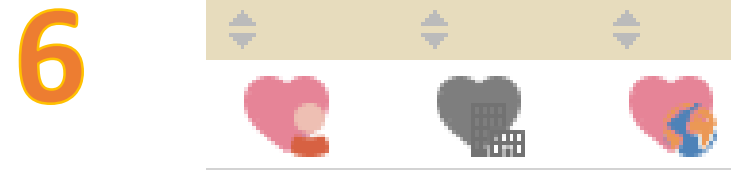
1 Click the “Tasks” icon on the horizontal list of template types



3 Specify “Visit” in the Category field and Search for “COPD” in the Template Name field



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



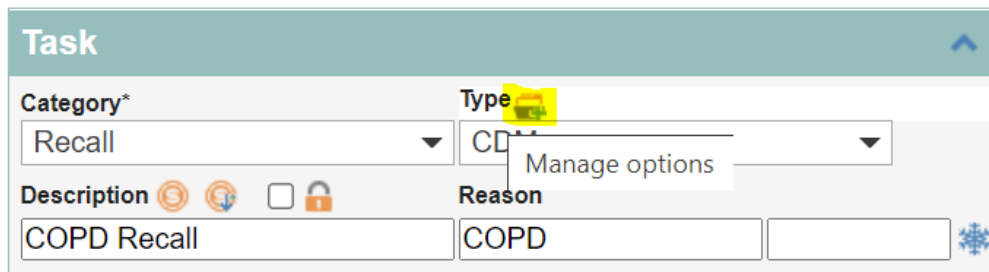
# Task Templates to Favorite

**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 Respiriology 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**



The screenshot shows a 'Task' form with the following fields:

- Category\***: Recall
- Type**: CDM (with a folder icon highlighted and a 'Manage options' tooltip)
- Description**: COPD Recall
- Reason**: COPD

- 3** Ensure that “Active” is selected for the types in the following slides.

**4**



Name	Active
CDM	<input checked="" type="checkbox"/>

# Activating Types

1

Locate the “COPD Respiriology 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
	<input type="checkbox"/>
Marijuana	<input checked="" type="checkbox"/>
No inhaled substances	<input checked="" type="checkbox"/>
Vaping	<input checked="" type="checkbox"/>
Ex-Smoker <= 5 years	<input checked="" type="checkbox"/>
Ex-smoker > 5 years	<input checked="" type="checkbox"/>
Non-smoker	<input checked="" type="checkbox"/>
Smoker	<input checked="" type="checkbox"/>
Vaping with Nicotine	<input checked="" type="checkbox"/>
Vaping without nicotine	<input checked="" type="checkbox"/>
Narcotic	<input checked="" type="checkbox"/>
Alcohol	<input checked="" type="checkbox"/>
Drug Use	<input checked="" type="checkbox"/>



# 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



# Activating Types

Find the “eDOCSNL COPD Recall” template and activate the following type:

Description		
Name		Active
CDM		<input checked="" type="checkbox"/>

# 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.

General Groups Passwords Macros Signing Options Preferences Filters Templates Workflows Features **Permissions** Contra Preferences

Preferred Mgmt History ▾

Other Permissions				
Name	Approve	Write	Read	None
Allergy	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Billing	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Demographics	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Goal	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Label	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Med	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Schedule	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save Reset

Permissions ▾

General

Task

Profile

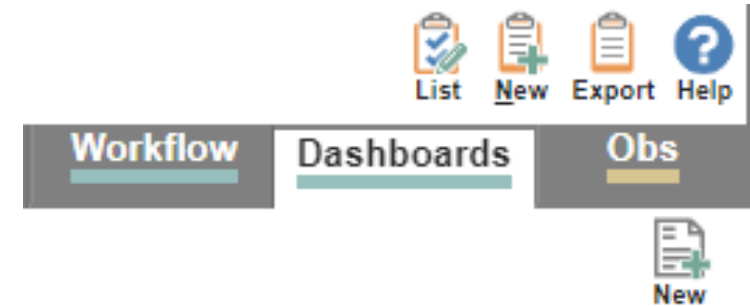
**Other**

# 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

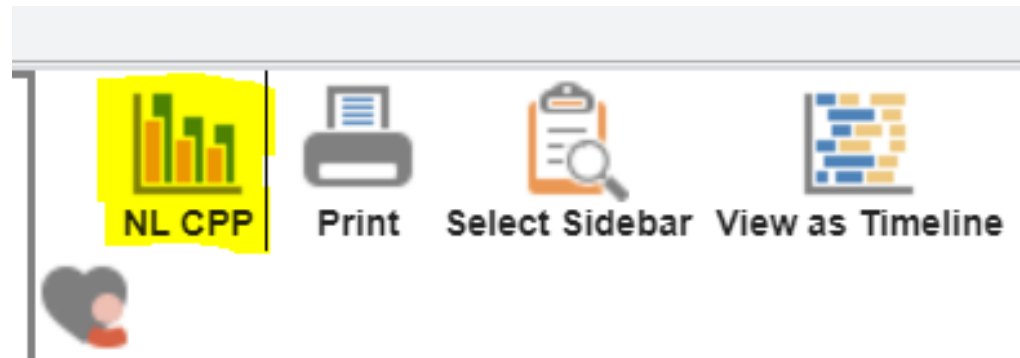
Dashboards

Name	Type
	Sidebar

Name	Description	Type	User				
Allergies	Allergies	Sidebar	TEN MOA	 	 		
Billing	Billing	Sidebar	TEN MOA	 	 		
eDOCSNL NL CPP Sidebar	eDOCSNL NL CPP Sidebar	Sidebar	Med Access	 	 		
Immunizer Sidebar Chart Summary		Sidebar	Med Access	 	 		
Mitch Test		Sidebar	Mitchell Fudge	 	 		
MOA5 Sidebar		Sidebar	FIVE MOA	 	 		
NL CPP		Sidebar		 	 		

# Adding goals to the sidebar

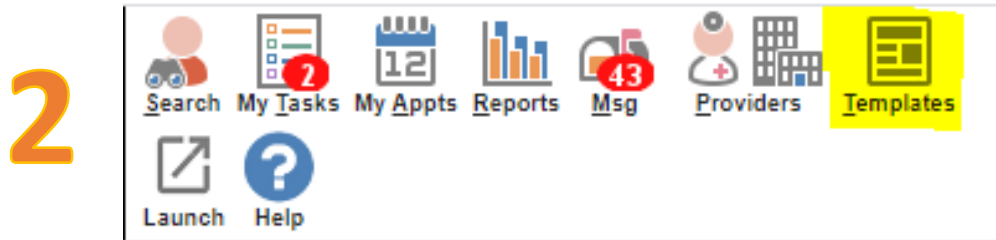
Once favorited, the sidebar will appear as selectable on the top of your existing sidebar, simply click it to make it appear.



Alternatively, you can use any sidebar that has goals.

# Ensure the Care Plan is Active

- 1** Click the “Templates” icon on the upper right of your dash board



- 3** Click the “List” icon in the upper right corner to see a list of care plans in your EMR instance

**4**

- 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”

Demographics Last CR Verified:

**6**

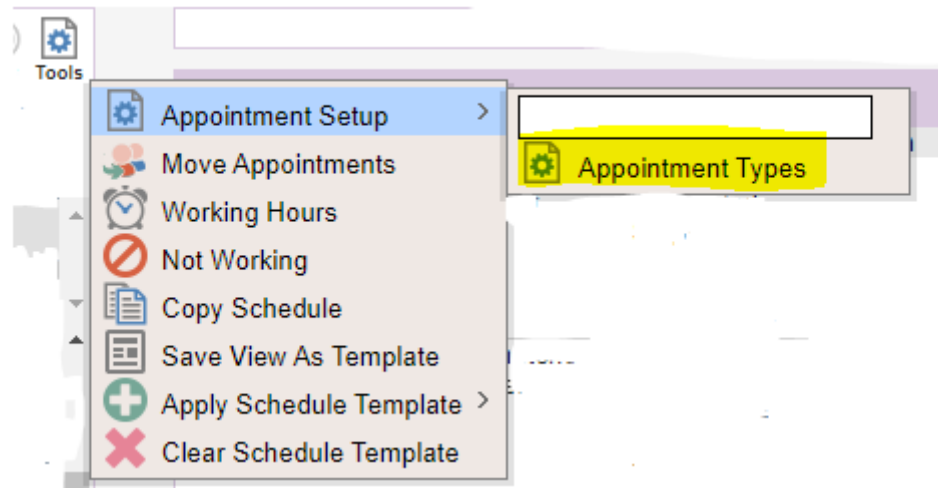


# Making an Appointment Type for COPD Management

1

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

2


















3

Select “New” in the upper right corner

4



# Setting up the Appointment Type

Name*	eDOCSNL NL CDM: COPD	
Duration*	30	(minutes)
Sort Order	0	
Colour	Light Periwinkle 	
Can't Overlap	<input type="checkbox"/>	
Max Per Day	4	
Multi-Patient Appointment	<input type="checkbox"/>	
Active	<input checked="" type="checkbox"/>	
Virtual Visit	<input type="checkbox"/>	
Self-Bookable	<input type="checkbox"/>	
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	<input type="checkbox"/>	

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”.

# Thank You

