



## The \*eDOCSNL Provincial Preventive Care Plan

February 2023

*Disclaimer: \*Please note that this guide is written based on the Telus Med Access EMR software (version 5.13.37) functionality and subject to change\**

## Preface: User Profile Settings for Goals and Inactivating Earlier Versions of the Preventative or Other Care Plan(s)

### User Profile Settings for Goals

The \*eDOCSNL Provincial Preventive Care Plan includes the option to apply Goals to a patient chart. To work with Goals in the EMR, a User's Profile needs to be set to "Approve" Goals in their Permissions tab - Other:

### User Settings: medtest

The screenshot shows the 'User Settings: medtest' interface. At the top, there are navigation tabs: General, Groups, Passwords, Macros, Signing Options, Preferences, Filters, Templates, Workflows, Features, Permissions, and History. The 'Permissions' tab is active, and a dropdown menu is open, showing options: General, Task, Profile, and Other (highlighted in green). Below the tabs is a table titled 'Other Permissions' with the following data:

Name	Approve	Write	Read	None
Allergy	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Billing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" 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"/>

At the bottom of the table, there are two buttons: 'Save' and 'Reset'.

### Inactivating Previous Versions of the Preventative or Other Care Plans

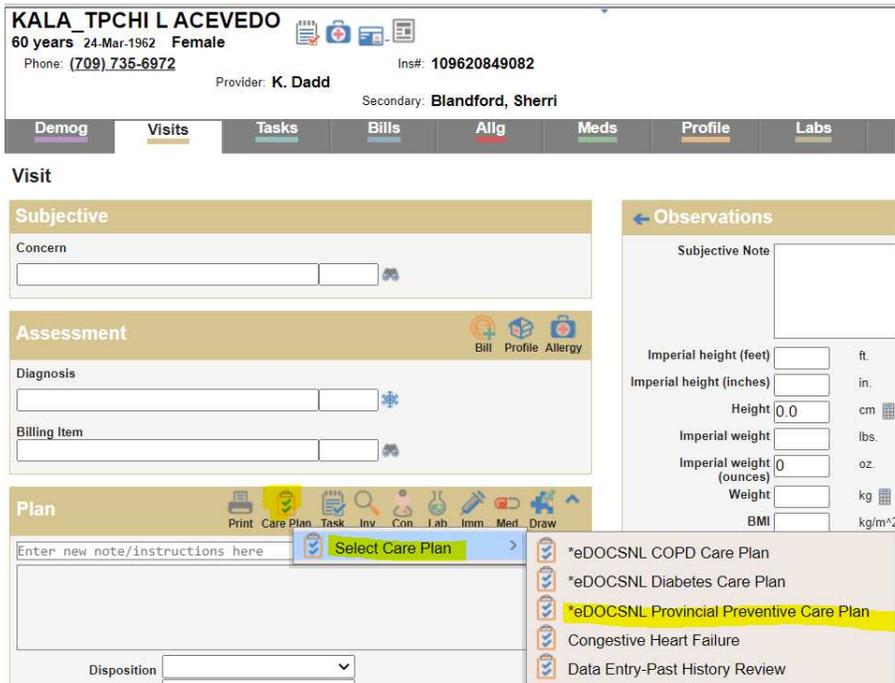
Please refer to **Appendix A** at the end of this document or contact [info@edocsnl.ca](mailto:info@edocsnl.ca) for assistance.

A Care Plan is a way to add multiple documentation items or perform multiple tasks simultaneously. This is an efficiency measure that prevents providers from having to navigate to multiple places in a chart to perform tasks one by one.

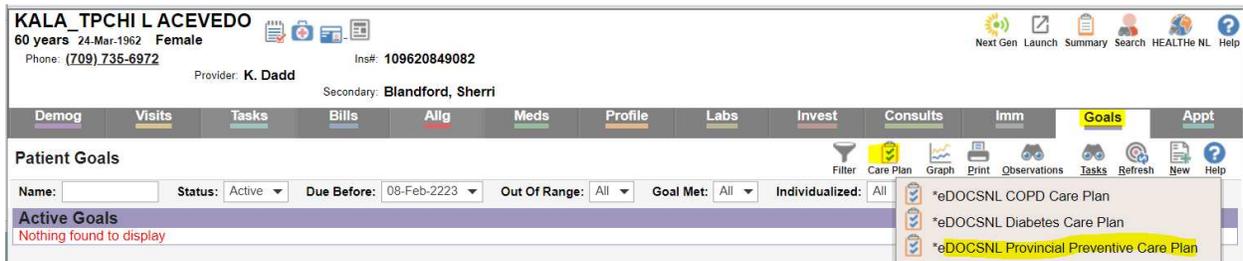
**Accessing and Applying the Care Plan**

Access the \*eDOCSNL Provincial Preventive Care Plan in one of two ways from within a patient chart:

1. Hover over the “Care Plan” icon in a Visit and select the \*eDOCSNL Provincial Preventive Care plan from the dropdown that appears:



2. Because this Care Plan also contains Goals, it can be accessed from the Goals tab in the patient’s chart. Hover on the “Care Plan” icon:



The Care Plan first appears as below. From the list, check in the applicable boxes of the Tasks and/or Goals to be applied to the specific patient's chart. These are explained in more detail in this guide.

Chart Summary ?

**Patient Summary**  
Care Plan \*eDOCSNL Provincial Preventive Care Plan

**Labs**

Active Requests	Date	Test Group Name	Description	Observations
<input type="checkbox"/>	25Jan23 07:03 AM	PAP Smear (NL) (Preventive Care Plan)	Lab. PAP SMEAR, PAP SMEAR Requisition, PAP Smear (NL) (Preventive Care Plan)	
<input type="checkbox"/>	20Jan23 09:57 AM	*Lab Req. Fecal Immunochemical Test Kit (FIT) (NL)	Lab. FIT Test, Fecal Immunoassay Test, *Lab Req. Fecal Immunochemical Test Kit (FIT) (NL)	
<input type="checkbox"/>	10Jan23 05:26 AM	Lab Req. Outpatient Specimen Collection (Preventive Care Plan)	Lab. PSA, Prostate Specific Antigen, Lab Req. Outpatient Specimen Collection (Preventive Care Plan)	

**Investigations**

Active Requests	Date	Urgency	Ordering Provider	Facility	Type	Description	Reason	Observation Status
<input type="checkbox"/>	25Jan23	Normal			Bone Density	Investigation, Bone Density, Screening BMD (CH)		
<input type="checkbox"/>	20Jan23	Normal			Mammogram	Investigation, Mammogram, Screening Mammogram (WH)		
<input type="checkbox"/>	10Jan23	Normal			Bone Density	Investigation, Bone Density, Screening BMD (LGH)		
<input type="checkbox"/>	10Jan23	Normal			Mammogram	Investigation, Mammogram, Screening Mammogram (LGH)		
<input type="checkbox"/>	10Jan23	Normal			Mammogram	Investigation, Mammogram, Screening Mammogram (EH)		
<input type="checkbox"/>	10Jan23	Normal			Bone Density	Investigation, Bone Density, Screening BMD (EH)		
<input type="checkbox"/>	10Jan23	Normal			Mammogram	Investigation, Mammogram, Screening Mammogram (CH)		
<input type="checkbox"/>	10Jan23	Normal			Bone Density	Investigation, Bone Density, Screening BMD (WH)		

**Consults**

Active Requests	Date	Urgency	Ordering Provider	Service Provider	Type	Description	Reason	Observation Status
<input type="checkbox"/>	08Feb23	Normal			Endoscopy	Consult, Endoscopy, Request for Endoscopy Consultation (LGH LHCLWHC)		
<input type="checkbox"/>	20Jan23	Normal			Endoscopy	Consult, Endoscopy, Request for Endoscopy Consultation (EH)		
<input type="checkbox"/>	11Jan23	Normal			Pharmacist	Consult, Pharmacist, Pharmacy Consult for Medication Review and Education		
<input type="checkbox"/>	11Jan23	Normal			Endoscopy	Consult, Endoscopy, Request for Endoscopy Consultation (LGH CCMH)		
<input type="checkbox"/>	10Jan23	Normal			Endoscopy	Consult, Endoscopy, Request for Endoscopy Consultation (WH)		
<input type="checkbox"/>	10Jan23	Normal			Endoscopy	Consult, Endoscopy, Request for Endoscopy Consultation (CH)		

**Goals**

Active Goals	Goal Name	Target	Last Value	Last Date	Repeat	Next Due	Met?
<input type="checkbox"/>	Bone Density				2 year	Unknown	No
<input type="checkbox"/>	Colonoscopy				5 year	Unknown	No
<input type="checkbox"/>	CT Colonoscopy/Colonography				5 year	Unknown	No
<input type="checkbox"/>	FECAL IMMUNOASSAY TEST				2 year	Unknown	No
<input type="checkbox"/>	Influenza (Flu)				1 year	Unknown	No
<input type="checkbox"/>	Mammogram				2 year	Unknown	No
<input type="checkbox"/>	PAP SMEAR				3 year	Unknown	No
<input type="checkbox"/>	Pneumococcal vaccination				5 year	Unknown	No
<input type="checkbox"/>	PROSTATE SPECIFIC Ag				2 year	Unknown	No

- If an item in a Care Plan (or Chart Summary) has two checkboxes, check the inside box and both boxes will be automatically selected.
- Once applicable Tasks and/or Goals are selected, click on “Apply Care Plan” icon at the bottom:

Chart Summary ?

**Patient Summary**  
Care Plan \*eDOCSNL Provincial Preventive Care Plan

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**Goals**

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<input type="checkbox"/>	Pneumococcal vaccination				5 year	Unknown	No
<input type="checkbox"/>	PROSTATE SPECIFIC Ag				2 year	Unknown	No

## Feature: Pre-Populated Tasks

Patient Summary									
Care Plan *eDOCSNL Provincial Preventive Care Plan									
<b>Labs</b>									
<b>Active Requests</b>									
Date	Test Group Name	Description	Observations						
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10Jan23 05:26 AM	Lab Req: Outpatient Specimen Collection (Preventive Care Plan)	Lab, PSA, Prostate Specific Antigen, Lab Req: Outpatient Specimen Collection (Preventive Care Plan)							
<b>Investigations</b>									
<b>Active Requests</b>									
Date	Urgency	Ordering Provider	Facility	Type	Description	Reason	Observation Status		
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10Jan23	Normal			Endoscopy	Consult, Endoscopy, Request for Endoscopy Consultation (WH)				
10Jan23	Normal			Endoscopy	Consult, Endoscopy, Request for Endoscopy Consultation (CH)				

Tasks can be added to the patient visit/chart from the Care Plan which may include pre-populated phrases and check boxes. This is an efficiency measure so that tasks don't have to be ordered one by one and reduces the amount of typing involved.

NOTE: As a feature only available from within the \*eDOCSNL Preventive Care Plan, some additional enhancements have been added to the Tasks. These enhancements are not available in the same Tasks if applied from outside of the \*eDOCSNL Preventive Care Plan. These features include:

### **Lab, PAP SMEAR (NL) Requisition (Preventive Care Plan):**

Hovering over the edit icon to the right of the ***"Previous Pap Smear?"*** field will show any previous Liquid Base Pap Smear results for that patient which have been delivered via eResults (i.e. not entered manually) to that EMR. The date can then be entered in that field by the Ordering Provider, if applicable:

#### **Tip: Hover on "Previous Pap Smear?" Field**

Hovering to the right of the ***"Previous Pap Smear?"*** field will show any previous Liquid Base Pap Smear results for that patient which have been delivered via eResults to that EMR.

**Task**

Category: Lab Type: PAP SMEAR

Description: PAP SMEAR Requisition Reason:

Note / Instructions: Enter new note/instructions here

Progress Indicators:

Assignee: Blake, Barbara Start: 10-Feb-2023 Due: 10-Feb-2023

Urgency: Normal Recurrence: None

Buttons: Save, Preview

**Newfoundland Labrador**

Here

Date of Birth: 1956-Mar-26 Sex: M F UN

Mailing Address: 148 SMALLWOOD ROAD  
City: VALLEY POND  
Province/Territory: NL Postal Code: A0G 4S0  
Telephone: (Indicate Preferred) Home (709) 146-4866 Work Cell (709) 676-6867

**PAP Smear Requisition**

Ordering Provider's Name: Barbara Blake  
Clinic Name: Mailing Address: City: Province/Territory: Postal Code: Phone: Fax: Signature: Date: 2023-Feb-10

Clinic Stamp: (include fax, provider and mnemonics) Barbara Blake, (BLAKBAR)

Ordering Provider's Meditech Mnemonic: BLAKBAR  
EMR Clinic Mnemonic: EMR0001  
COPY TO PROVIDER

Date Specimen Taken: Previous Values: 29Nov19 Liquid Base Pap Smear

Clinical History: Post-Menopausal? Last Menstrual Period: Hysterectomy? Abnormal Bleeding? Previous Abnormal Pap/Colposcopy? Specify: HPV Vaccination? Previous Pap Smear? If yes, date:  Yes  No

PATIENT BARKER, MERRI TPCHI ACCT #: WF-000019-19 LOC: WMH DI CHART#: W000722  
MCP #: 148603415782 AGE: SX: 57 F ROOM: REG DT: 29/08/19  
REG DR: TAVENOR, ANTHONY STATUS: REG REF BED: DIS DT.  
Spec #: CY619 Spec Date: 29/11/19 Status: SOUT Reg#: 00009384  
Received: 29/11/19-1332  
Spec type: LB PAP Copy To: COLEMAN, DAVID ALLISON  
EMR\_MAIN ST MEDICAL CLINIC  
MACAULAY ANDRIA JAYNE

(Result is fictitious and for illustration purposes only)

**Lab, PSA, Prostate Specific Antigen Lab Requisition (Preventive Care Plan):**

- The PSA checkbox is pre-selected.
- If applicable, medications can be “dragged and dropped” from the Patient’s Sidebar into the Drug #1 and Drug #2 fields (and then edited, if applicable). This is done by left-clicking with your mouse on the selected medication and continue to hold and drag and then let go over field.
- The ability to “drag and drop” from the patient’s Sidebar is repeated wherever there is a fillable Medications or Allergies field on all Requisitions created from within the \*eDOCSNL Provincial Preventive Care Plan.

**Tip: “Drag and Drop” from Sidebar**

The ability to “drag and drop” from the patient’s Sidebar is repeated wherever there is a fillable Medications or Allergies field on all Requisitions created from within the \*eDOCSNL Provincial Preventive Care Plan.

**Task**

Category: Lab Type: PSA

Description: Prostate Specific Antigen Reason:

Note / Instructions: Enter new note/instructions here

Progress Indicators:

Assignee: Blake, Barbara Start: 10-Feb-2023 Due: 10-Feb-2023

Urgency: Normal Recurrence: None

Buttons: Save, Preview

Mailing Address: City: Province: Postal Code: Phone: Fax: Signature: Date: 2023 / Feb / 10

Ordering Provider's Meditech Mnemonic: BLAKBAR  
EMR Clinic Mnemonic: EMR0001  
COPY TO PROVIDER

**DIAGNOSIS / RELEVANT HISTORY**

**HEMATOLOGY**  
 CBC (Includes automated differential)  
 PTI INR Anticoagulant

**IMMUNOHEMATOLOGY**  
 BLTABS Type and Screen

**CHEMISTRY**  
 GLUFA Glucose (Fast 8hr)  
 GLUCO Glucose - Random (Non-fasting)  
 GTT2H 75 gm OGTT (Fast 8hr)  
 GHP50GGO 50 gm Prenatal Screen (Non-fasting)  
 GTTG 75 gm OGTT (Fast 8hr; for PRE-NATAL use)  
 HBA1CTHB Hemoglobin A1C  
 CR Creatinine (with eGFR)  
 SODIU Sodium  
 POTAS Potassium  
 BILTO Bilirubin, Total  
 HEPALP ALP, ALT (Reflex AST & Total Bilirubin)  
 CALCI Calcium (with Albumin)  
 URATE Uric Acid  
 PROTE Total Protein  
 ALBUM Albumin  
 CREKI Creatine Kinase  
 HEPALP ALP, ALT (Reflex AST & Total Bilirubin)  
 LIPID TChol, HDL, TG, Calculated LDL, non-HDL-C  
 TSH Thyroid Stimulating Hormone (Reflex fT4)  
 CRPHS C-Reactive Protein  
 FCENI Ferritin  
 PSA Prostate Specific Antigen (PSA)

**Frequency of Testing (For Repeat Testing)**

**THERAPEUTIC DRUG MONITORING**

Drug #1: AMOXICILIN 500 mg CAPSULE  
Date and Time of Last Dose: 08:00 AM  
Date and Time of Next Dose: 08:00 AM  
Drug #2: [Empty]  
Date and Time of Last Dose: 08:00 AM  
Date and Time of Next Dose: 08:00 AM

**URINE TESTING Antibiotics:**  
 URINAP Urinalysis (reflex microscopic when applicable)  
 HCGU Pregnancy Test  
 URINCU Urine Culture Symptomatic Pregnant (Urine cultures collected from indwelling catheters will be rejected)  
 MALCRPU Albumin/Creatinine Ratio (Microalbumin)

**PRENATAL SCREENING**  
 BLTABS Type and Screen  
 PNS Prenatal Serology (Includes HIV, Rubella, HESAG, Syphilis Screen)

**MICROBIOLOGY**  
 HIVS HIV Screen  
 HBSAB Hep B Immunity Screen  
 TPALAB Syphilis Screen  
 CTNGDP CT/NG Testing (Swab)  
 CTNGDPU CT/NG Testing (Urine)  
 HEPDXX Hepatitis Diagnosis Panel (HAV IgM, HBV surface Ag, anti-HBc core total, anti-HCV)

**ADDITIONAL REQUESTS: (MUST BE PRINTED LEGIBLY)**

Medications sidebar: AMOXICILIN 500 mg CAPSULE

Clinical Metrics:  
Height: 0.0 cm 2018-08  
BMI: 114.0 kg/m<sup>2</sup> 2018-08  
BP systolic: 12 mm Hg 2018-08  
Weight: 100.7 kg 2018-08  
BP diastolic: 1 mm Hg 2018-08

Allergies:  
DA Suffs (Sulfonamide Anti... Other Urlikn  
No review: No non-drug allergies  
No review: No drug intolerances  
No review: No non-drug intolerances

INR Results (Most Recent 5)  
Nothing found to display

## Investigations, Screening Mammogram and Screening Bone Density (EH, WH, CH and LGH):

All Mammography and Bone Mineral Density Requisitions from all four Regional Health Authorities (RHAs) have been pre-populated with similar information:

- “Screening” and the RHA are indicated in the Description of the Task
- The specific exam, including “screening” is pre-populated in the Exam Required field.
- “Outpatient” check box is pre-selected.
- “Screening” check box is pre-selected.
- Drag and Drop from Sidebar functionality applies to Allergies and Medications fields.

The screenshot shows a medical requisition form for Mammography. The form is titled "MAMMOGRAPHY REQUEST FOR EXAM & CONSULTATION" and includes fields for patient information, exam requirements, and clinical information. Red boxes highlight specific fields: "Screening Mammogram (WH)" in the Task Description, "Screening Mammogram" in the Exam Required field, "4 Screening" in the Priority field, and "DA Sulfa (Sulfonamide)" in the Allergies field.

## Consults, Endoscopy, Request for Endoscopy Consultation (EH, WH, CH and LGH)

All Request for Endoscopy Consultation Requisitions from all four Regional Health Authorities (RHAs) have been pre-populated with similar information:

- “Request for Endoscopy Consultation” and RHA are included in the Description of the Task.
- “Outpatient” check box is pre-selected.
- “Screening Colonoscopy” check box is pre-selected.
- Drag and Drop from Sidebar functionality applies to Allergies fields.





## Feature: Goals

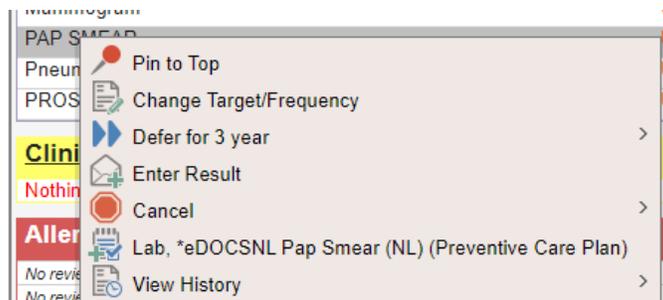
Individual patient goals can be set up from within the \*eDOCSNL Provincial Preventive Care Plan.

These goals are individualized to the particular elements of care and/or monitoring to be followed for this patient and have been configured to represent the critical elements of a variety of current provincial and national best practice guidelines.

Select which goals you will apply to the individual patient by clicking the check box to the left of the item and then click on “Apply Care Plan”.

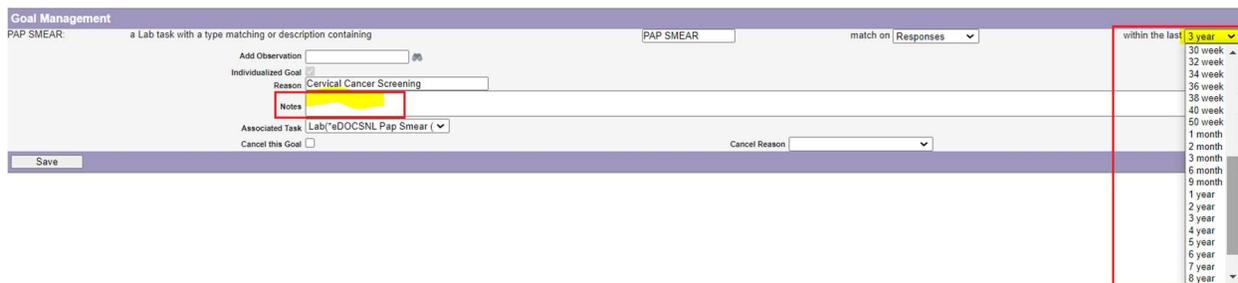
Active Goals	Goal Name	Target	Last Value	Last Date	Repeat	Next Due	Met?
<input type="checkbox"/>	Bone Density				2 year	Unknown	No
<input type="checkbox"/>	Colonoscopy				5 year	Unknown	No
<input type="checkbox"/>	CT Colonoscopy/Colonography				5 year	Unknown	No
<input type="checkbox"/>	FECAL IMMUNOASSAY TEST				2 year	Unknown	No
<input type="checkbox"/>	Influenza (Flu)				1 year	Unknown	No
<input type="checkbox"/>	Mammogram				2 year	Unknown	No
<input type="checkbox"/>	PAP SMEAR				3 year	Unknown	No
<input type="checkbox"/>	Pneumococcal vaccination				5 year	Unknown	No
<input type="checkbox"/>	PROSTATE SPECIFIC Ag				2 year	Unknown	No

Once applied to a patient chart, there are a number of common features of each Goal. These can be accessed by hovering and right-clicking on the Goal:

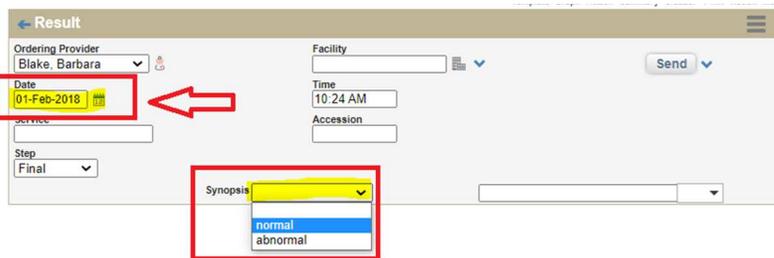
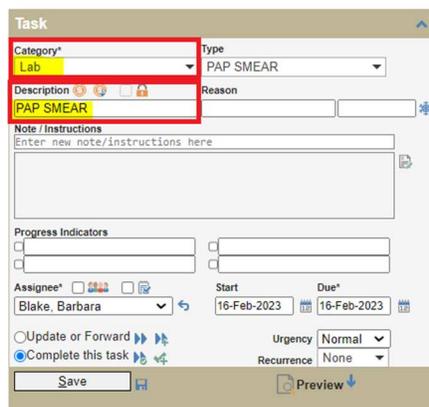


1. **Pin to Top** – that Goal will appear at the top of the Goal list in that patient’s chart.
2. **Change Target/Frequency** – the interval for monitoring can be changed, unique to the specific patient and/or a Note unique to that patient can be entered.

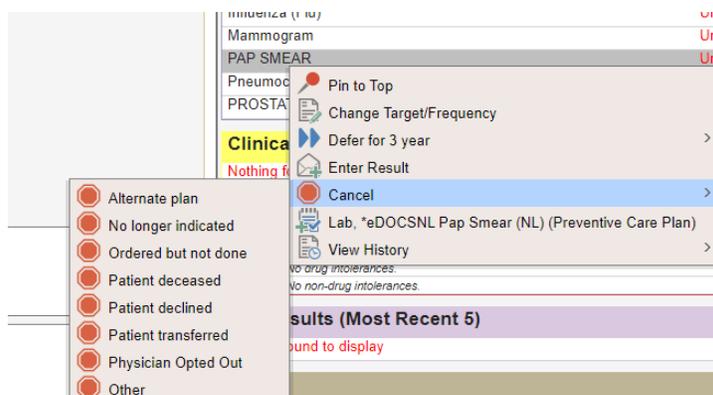
3. **Defer for “x year”** – based on the original screening interval set for the Goal, it can be Deferred for the same length of time. Selecting a Deferral requires also selecting a Reason, and note that it creates a fictitious Cancelled Result for the date that the Deferral is created and uses that date to Defer for the set period of time:



4. **Enter Result** – a result, pre-populated with the appropriate Category and Description which will “match” the Goal, can be manually entered. Note that it is very important to enter/backdate the date that the test was resulted on the right-hand side. For pap smear results (only) an additional feature is included “normal” or “abnormal” can be noted using the Synopsis pull-down. For all other results, it is recommended that additional free text be entered on the left-side of the Task in the Note/Instructions field:

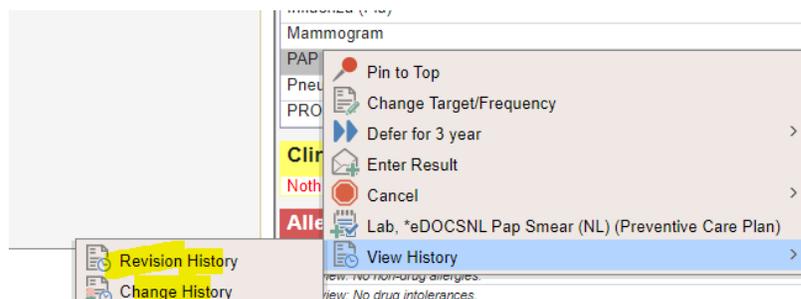


- Cancel** – once applied, a Goal can be Cancelled. A reason must be specified. Once Cancelled, the Goal can also then be Deleted if it was entered in error.



- Associated Task (i.e. Lab. \*eDOCSNL Pap Smear (NL) (Preventive Care Plan))** – if the corresponding order/requisition for the test is a provincial requisition and not a series of different Regional Health Authority requisitions, the Task Template for the provincial requisition has been embedded with the Goal. Providers can seamlessly create an order by selecting that Task template. The corresponding Task Template contains all of the unique features to the Tasks within the \*eDOCSNL Provincial Preventive Care Plan as described earlier in this document.

- View History** – provides a history of the activity surrounding that Goal. Note that the initial application of the Goal via the Care Plan to the patient chart will appear as being done by the “System, System RAM” not a specific user.



Goal History

Update on	Updated By	Goal Name	Synonyms	Condition	Target	Repeat	Last Date	Last Value	Next Due	Met?	Status	Cancel Reason	Notes
2023-02-16 11:12:04	Blake, Barbara	PAP SMEAR			PAP SMEAR	1 year			Unknown		active		
2023-02-16 10:08:17	System, System RAM	PAP SMEAR			PAP SMEAR	3 year			Unknown		active		

## Applying the Care Plan

If not already done, when finished selecting the elements of the Care Plan you wish to apply to the current patient, click the “Apply Care Plan” icon at the bottom of the Care Plan (see above). Note that applying the same item(s) more than once to a patient will result in a duplicate of that item. However, duplicates can be easily Deleted or Cancelled/Deleted from the chart.

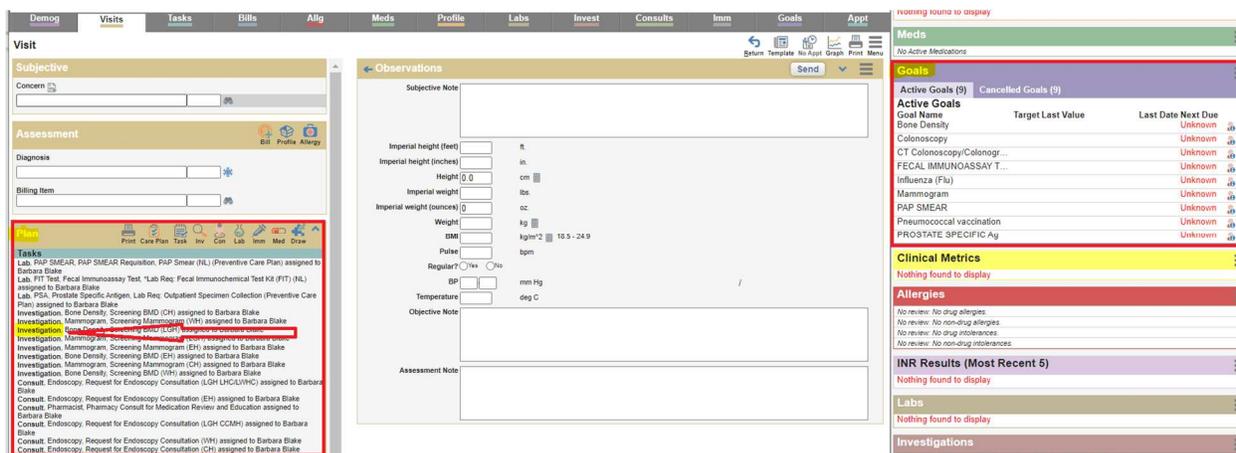
If the Care Plan was applied from within a Patient Visit, a summary of all the Tasks that were ordered will be visible in the “Plan” section. These can be actioned individually from here by clicking on the **bold** part of the line.

These Tasks will remain Active until they are Completed or actioned, either from this area or from the applicable Tab in the chart.

**Note: Tasks generated from a Care Plan still need to be executed**

Tasks that are created by the Care Plan appear in an active and incomplete state and still need to be actioned individually.

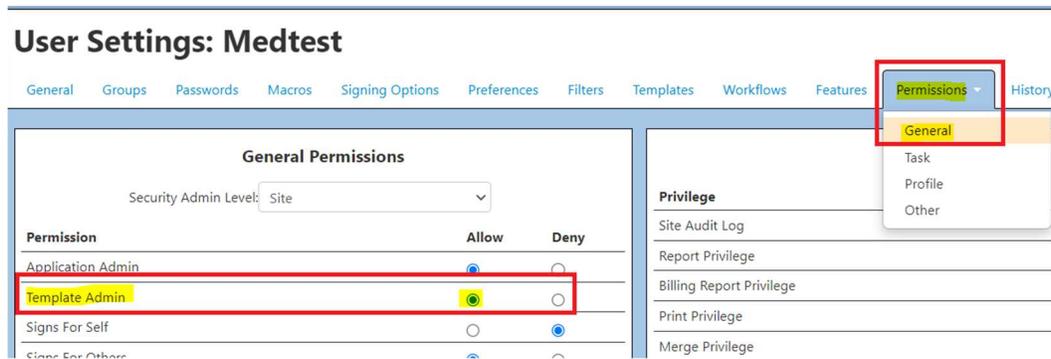
Goals that were applied can be viewed from the sidebar view to the right of the patient visit template:



Please contact the eDOCSNL Program at [info@edocsnl.ca](mailto:info@edocsnl.ca) for assistance, if required.

## Appendix A: How to Inactivate a Care Plan

The user must have Permissions set to Template Admin “Allow” in their Permissions – General in their User Profile:



Select (click on) **Templates** icon from main EMR Dashboard:



Select **List**:



Select the **Care Plan** you want to inactivate:

Care Plan Name	Type	Origin	Created Date	Last Updated By
Care Plan	CARE PLAN	LOCAL	2021-Mar-29	Sarah Lawrence
*eDOC SNL COPD Care Plan, Care Plan	CARE PLAN	SYSTEM	2021-Nov-04	System RAM System
*eDOC SNL Diabetes Care Plan, Care Plan	CARE PLAN	SYSTEM	2022-May-05	System RAM System
*eDOC SNL Provincial Preventive Care Plan, Care Plan	CARE PLAN	SYSTEM	2023-Feb-13	System RAM System
AN Care Plan, Care Plan	CARE PLAN	LOCAL	2022-Oct-06	April Newhook
Barbara's Test, Care Plan	CARE PLAN	nlabconf	2019-Dec-12	System RAM System

In the **Demographics** tab – if the Status is not “greyed out”, proceed with a. below. If the Status is “greyed out”, proceed with b. below:

- a. If the **Status** not greyed out and is “Active”, pull down and select “Inactive” and the “Save”



This will move the now inactive Care Plan down on the list to the Care Plans which are Inactive (denoted by a person with blue exclamation mark icon) in that EMR:

