

# Using Cancelled Goals to Disable CDSs for Specific Patients

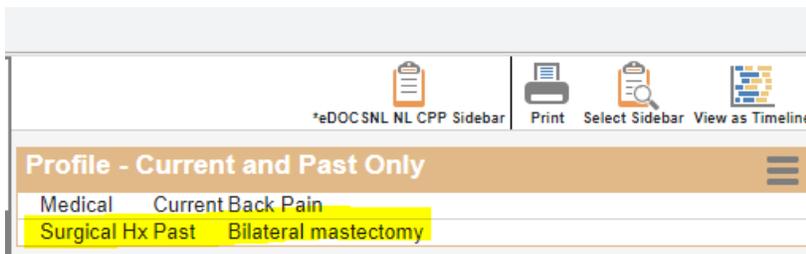
eDOCSNL  
ELECTRONIC MEDICAL RECORD

(CDS - Clinical Decision Support)

Original: May 15, 2023

The \*eDOCSNL Provincial EMR CDS triggers are evidence-based assistive alerts for clinicians that have been developed for population-based screening procedures. These alerts are aligned with provincial and national guidelines for the age of the patient and frequency interval of the screening maneuvers. Please refer to <https://edocsnl.ca/resources/practice-360/> for information on the \*eDOCSNL Provincial Screening Clinical Decision Support (CDS) triggers already available in each EMR.

The \*eDOCSNL Provincial EMR CDS triggers will continue to be met (ie “go away”) if the specified result is in the patient’s chart within the specified screening period. Furthermore, for the Breast Screening CDS specifically, the trigger will also be met and not appear if the patient has had a Bilateral Mastectomy which is documented in the Surgical Hx or Medical Profile categories in the patient’s EMR chart:

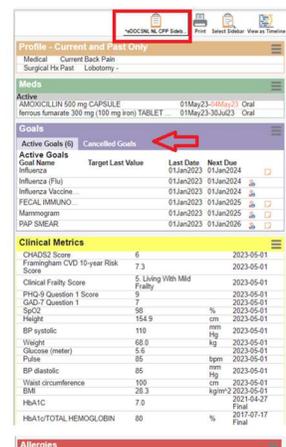


eDOCSNL has added an enhancement to four of the \*eDOCSNL Provincial EMR CDS triggers which, when the trigger is applied to a group/population of patients, can be disabled for an individual patient by the means of **applying the corresponding Goal** from the \*eDOCSNL Provincial Preventive Care Plan to that patient and **then Cancelling the same Goal using one of three Cancellation Reasons: No Longer Indicated, Patient Deceased or Patient Declined**.

Details on the new \*eDOCSNL NL CPP Sidebar can be found on the eDOCSNL website at: <https://edocsnl.ca/resources/practice-360/>

## Tip: Updated \*eDOCSNL NL CPP Sidebar

To support the use of Cancelled Goals and to provide a more informed summary view into the patient’s chart, eDOCSNL has also released an updated **\*eDOCSNL NL CPP Sidebar**:



The 4 \*eDOCSNL Provincial EMR CDS triggers and the corresponding Goals that, if Cancelled, can disable them are:

CDS Trigger	Cancelled Goal
*eDOCSNL Provincial Screening CDS Breast Screening w/Goal & Bilateral Mastectomy Excl.	Mammogram
*eDOCSNL Provincial Screening CDS Cervical Cancer Screening age 21-69 w/Goal Excl.	PAP SMEAR
*eDOCSNL Provincial CDS Colorectal Cancer Screening w/Goal Excl.	FECAL IMMUNOASSAY TEST
*eDOCSNL Provincial Screening CDS Influenza Vaccine Reminder w/Goal Excl.	Influenza Flu Vaccination

## 1. SETTING UP CDS TRIGGERS

Before you begin:

- CDS Triggers can be setup for an individual provider or for a provider group by a user who has administrative privileges. Before you activate any triggers, you need to determine if you are setting them up for a single provider or for a group (i.e. your clinic) as this will influence the steps you will need to take. **Activating CDS Triggers for an individual user must be done by the user who wants to use them, whereas activating them for a group can be done by any user with admin privileges.**
- Access to the Templates library is provided through permissions in your Med Access EMR (see image below). If you do not see a Templates icon, contact the person in your clinic who has the administrative privileges for the EMR:



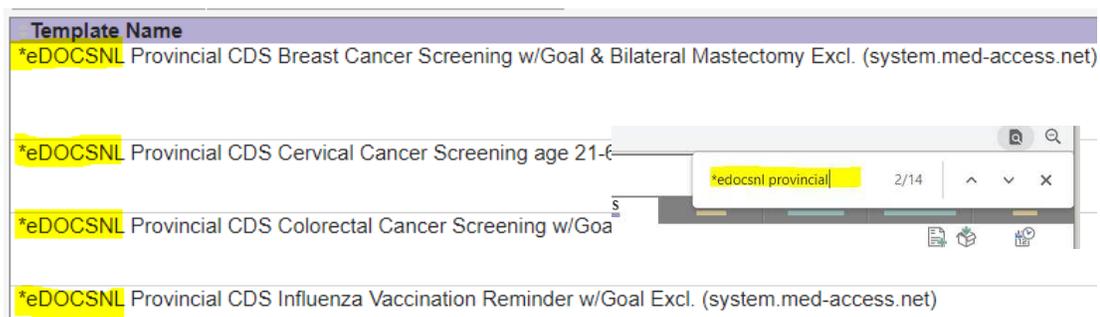
Steps to Set-Up:

- Click on the Templates icon as described above.
- In the Templates library, click on the CDS tab shown below:



- There are a large number of CDS Templates/Triggers in the CDS Tab. Search to select the appropriate CDS Triggers by either:

- (i) Scrolling down to find the **CDS Provincial Screening Triggers that are all prefixed by \*eDOCSNL Provincial:**



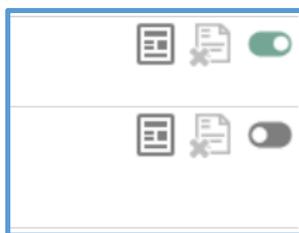
- (ii) **OR** holding down the 'Ctrl' key and 'F' key on the keyboard at the same time then typing **\*edocsnl provincial** in the search box that appears. This will quickly navigate you to the Provincial Screening CDS Triggers.

### Enabling CDS Triggers as a Single User:

- a. If you are enabling CDS Triggers for yourself, find the toggle on the right side of the screen for that trigger. You will note that when you hover your mouse over the toggle button there is description/help text that says "Enable CDS Warning for user."



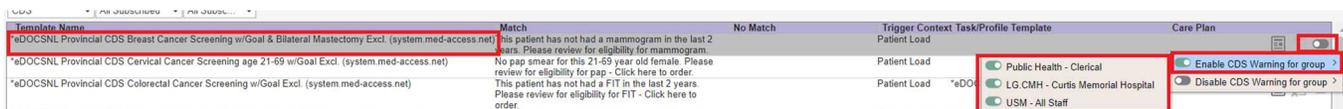
- b. **Left click** the toggle button for the trigger you wish to activate (it will turn green). Once green in color, the trigger is activated. In the image below you will see the difference between a green/activated trigger and one that is not activated.



- c. To disable, click the green toggle back to gray.

### Enabling CDS Triggers as Group:

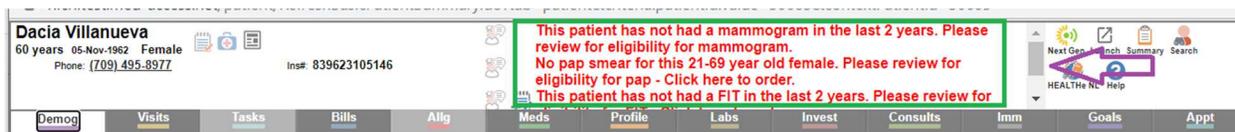
- (iii) If you are activating a trigger for a group, the steps are slightly different. **Right click** on the toggle button instead of left clicking. You will note that you have the choice to "Enable CDS Warning for group." Hover over "Enable CDS Warning for group" and the groups that show in the next menu are the ones you have been provided access to. Select which users you would like to have the CDS Trigger activated for. It is important to review and determine what group should receive these communications.



- (iv) To disable for the group, **right click** again and select “Disable CDS Warning for group.”

## 2. LOCATING CDS TRIGGER MESSAGES

When activated, the messages appear at top of the patient chart while the chart is in use. Please note that when a large number of triggers are applicable to a given patient, they may not all appear so you will need to scroll through, using the scroll bar next to the messages displayed:

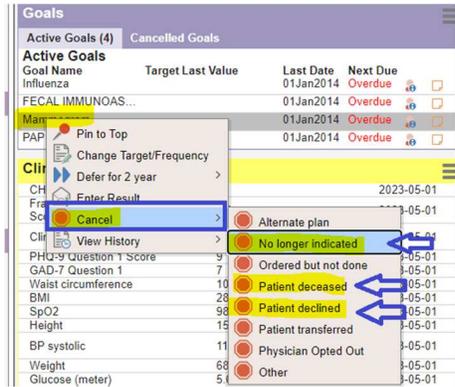


## 3. DISABLING MAMMOGRAM, PAP SMEAR, FIT AND/OR INFLUENZA IMMUNIZATION CDS TRIGGERS MESSAGES FOR SPECIFIC PATIENTS

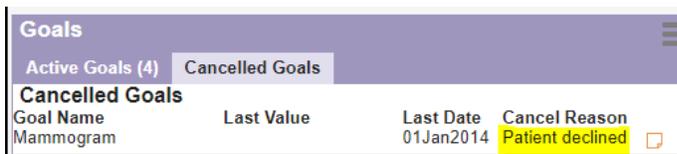
- (i) Apply an Active Mammogram, PAP Smear, Fecal Immunoassay Test, and/or Influenza Goal to the patient’s chart using the \*eDOCSNL Provincial Preventive or Diabetes Care Plans, or by creating the applicable Goal(s) yourself:

Goals				
Active Goals (4)		Cancelled Goals		
Active Goals				
Goal Name	Target Last Value	Last Date	Next Due	
Influenza		01Jan2014	Overdue	 
FECAL IMMUNOAS...		01Jan2014	Overdue	 
Mammogram		01Jan2014	Overdue	 
PAP SMEAR		01Jan2014	Overdue	 

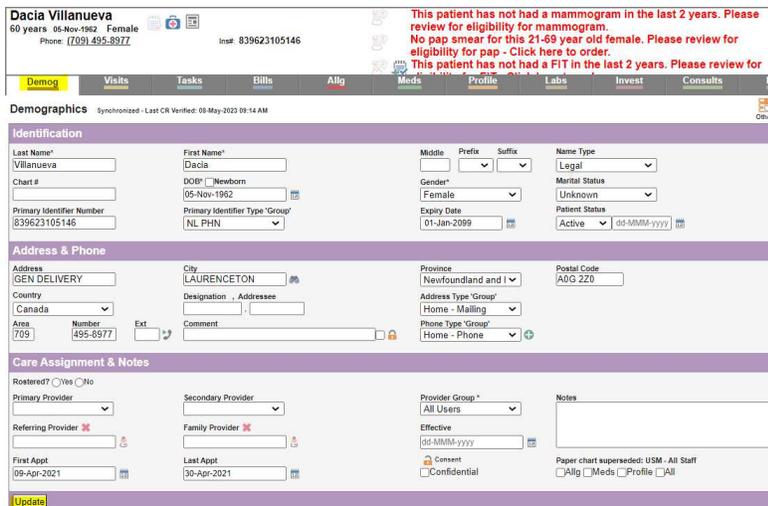
- (ii) Hover and right-click on the Goal to be cancelled and select (left click) on one of the three (3) cancellation reasons: **“No longer indicated”**, **“Patient deceased”** or **“Patient declined”** which will disable the Clinical Decision Support (CDS) trigger message at the top of that patient’s chart:



- (iii) Any **Cancelled Goals**, including the **Reason**, will appear in the Cancelled Goals filter in the Goals Widget:



- (iv) Click on the **“Update”** button on the **Demographics** tab to force a refresh of the CDS trigger message at the top of the chart. The CDS trigger message will also refresh the next time the chart is re-opened:



- (v) The CDS trigger message regarding the patient not having a mammogram “goes away” (is disabled):

The screenshot shows the EHR interface for Dacia Villanueva. A CDS trigger message is displayed at the top, indicating that the patient is due for a pap smear and FIT. The message is highlighted in a blue box. The patient's demographic information is visible below, including her name, age, gender, and date of birth. The CDS trigger is disabled, as indicated by the text 'No pap smear for this 21-69 year old female...'.

- (vi) If applicable, the Cancelled Goal can be **Re-activated** by hovering and right-clicking on it

The screenshot shows the 'Goals' section in the EHR interface. It displays a table of 'Cancelled Goals' with the following data:

Goal Name	Last Value	Last Date	Cancel Reason
Mammogram		01Jan2014	Patient declined
Clinical			
CHAD		2023-05-01	
Framingham		2023-05-01	
Score		2023-05-01	
Clinical		ing With Mild	2023-05-01

A context menu is open over the 'Mammogram' goal, showing the following options: Pin to Top, Change Target/Frequency, Re-Activate, Delete, and View History. The 'Re-Activate' option is highlighted.

- (vii) Note that **Deleting** a goal will remove it entirely for that patient and the CDS trigger message will reappear if it is applicable to that specific patient.

## Contact / Support

Email [info@edcosnl.ca](mailto:info@edcosnl.ca) for any additional information or if you require assistance.