# Using Cancelled Goals to **EDC Disable CDSs for Specific Patients**



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

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

Template N	lanagemen	t													List	New Export Help
Demog	Visits	Tasks	Bills	Meds	Profile	Labs	Invest	Consults	Imm	Goals	Appt	CDS	Filter	Workflow	Dashboards	Obs

3. 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."

Template Hume	Match	No Match	Trigger Context Task/Profile Template	Care man
*eDOCSNL Provincial CDS Breast Cancer Screening w/Goal & Bilateral Mastectomy Excl. (system.med-access.net)	his patient has not had a mammogram in the last 2 years.		Patient Load	
*eDUCSNL Provincial CDS Cervical Cancer Screening age 21-69 w/Goal Excl. (system.med-access.net)	to pap smear for this 21-69 year old female. Please review for lightlifty for pap Click bere to order		Patient Load	Enable CDS Warning for user
* DODDHID -1 110D001 110 0 1 10 10 10 10 10 10 10 10 10			DIS 11 1 TRODONILLED FITD 112	

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.

CD3 * All Subscilled * All Subscille					
Template Name	Match	No Match	Trigger Context Task	/Profile Template	Care Plan
"eDOCSNL Provincial CDS Breast Cancer Screening w/Goal & Bilateral Mastectomy Excl. (system.med-access.net	his patient has not had a mammogram in the last 2 ears. Please review for eligibility for mammogram.		Patient Load		
*eDOCSNL Provincial CDS Cervical Cancer Screening age 21-69 w/Goal Excl. (system.med-access.net)	No pap smear for this 21-69 year old female. Please review for eligibility for pap - Click here to order.		Patient Load	Public Health - Clerical	Enable CDS Warning for group >
*eDOCSNL Provincial CDS Colorectal Cancer Screening w/Goal Excl. (system med-access.net)	This patient has not had a FIT in the last 2 years. Please review for eligibility for FIT - Click here to order.		Patient Load *eDO	<ul> <li>LG.CMH - Curtis Memorial Hospital</li> <li>USM - All Staff</li> </ul>	Disable CDS Warning for group >

(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:

Dacia Villanueva 60 years 05.Nov.1962 Female Phone: (709) 495.8977	Ins#: 839623105146	2 2 2 3	This p review No pa eligibi	atient has not v for eligibility f p smear for thi lity for pap - Cl atient has not	had a mammo for mammogra s 21-69 year o lick here to or had a FIT in th	ogram in the la am. Id female. Ple der. ne last 2 years	ast 2 years. Ple ease review for s. Please review	ase v for	Next Gen Linch Sum HEALTHe NL Help	nary Search
Demog Visits Tasks	Bills	Allg	Meds	Profile	Labs	Invest	Consults	Imm	Goals	Appt

## **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					Ξ
Active Goals (4)	Cancelled Goals				
Active Goals Goal Name Influenza	Target Last Value	Last Date 01Jan2014	Next Due Overdue		D
FECAL IMMUNOAS	S	01Jan2014	Overdue	8	D
Mammogram		01Jan2014	Overdue	6	D
PAP SMEAR		01Jan2014	Overdue	6	D

(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:

Goals						
Active Goals (4)	Cancelled Goals					
Active Goals Goal Name Influenza	Target Last Valu	ie	Last Date 01Jan2014	Next Due Overdue	Ð	C
FECAL IMMUNOA	S		01Jan2014	Overdue	.0	G
Mam		1	01Jan2014	Overdue	.0	G
PAP Pin to To	p		01Jan2014	Overdue		G
CH Enter Re Fra Cancel	z year	A	lternate plan	202	3-05- 3-05-	01
Clir 🛃 View His	tory >		lo longer indica	ted <	1	<b>1</b>
PHQ-9 Question	Score 9	0	Ordered but not	done	1-05-	01
Waist circumferen	ce 10	🔘 F	atient decease		05-	01
SpQ2	20	F	atient declined	1	105	.01
Height	15	O F	atient transferre	ed	3-05-	01
BP systolic	11	F	hysician Opted	Out	3-05-	01
Weight	68	Ŏ	Other		3-05-	01
Glucose (meter)	5.	-	100000		5-05-	-01

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

Goals			
Active Goals (4)	Cancelled Goals		
Cancelled Goal	s		
Goal Name	Last Value	Last Date Cancel Reason	
Mammogram		01Jan2014 Patient declined	E

(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 re-opened:

Dacia Villanueva 60 years 05-Nov-1962 Female Phone: (709) 495-8977	Ins# 839623105146	This patient has not had review for eligibility for n No pap smear for this 21 eligibility for pap - Click I Eligibility for pap - Click I This patient has not had	a mammogram in the last 2 years. Please nammogram. -69 year old female. Please review for here to order. a FIT in the last 2 years. Please review for
Demog Visits	Tasks Bills Allg	Meds Profile	Labs Invest Consults In
Demographics Synchronized - Last CR Ve	erified: 08-May-2023 09:14 AM		Steel Charles
Identification			
Last Name* Villanueva Chart # Primary Identifier Number 839623105146	First Name* DOB* Newborn 05-Nov-1962 Finary Identifier Type 'Group' NL PHN	Middle Prefix Suffix Gender* Female Expliny Date 01-Jan-2099	Name Type Legal  Varial Status Unknown  Varial Status Active  downownyy)  th
Address & Phone			
Address GEN DELIVERY Canada Area 709 Number 495-8977 X	City LAURENCETON &	Province Newfoundland and I V Address Type 'Group' Home - Mailing V Phore Type 'Group' Home - Phone V 🗘	Postal Code AOG 2Z0
Care Assignment & Notes			
Rostered? ()Yes ()No Primary Provider	Secondary Provider	Provider Group *	Notes
Referring Provider 🕌	Family Provider 🗱	Effective dd-MMM-yyyy	
First Appt 09-Apr-2021	Last Appt 30-Apr-2021	Consent	Paper chart superseded: USM - All Staff AllgMedsProfileAll

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

Dacia Villanueva 60 years 65.Nor.1982 Female Phone (709).495.8977 inst 839623105146	No pap smear for this 21-by year old temale, Please review for eligibility for pap. Click here to order. This patient has not had a Fill in the last 2 years. Please review eligibility for Fil- Click here to order.	v for	"HOCE DAL M. CPP Edebary Print Select Edebary Very as Imatine
Demog Visits Tasks Bills Demographics Synchronized - Last CR Ventiled: (0EMay-2023 02:14 AM Identification	Allg Meds Profile Labs Invest Consults	Imm Goals Appt	Profile - Current and Past Only Medical Current Back Pain Medis
Incontinuencial Las Nerrais Villanureva Casta Service Cast	Middle     Perfix     Name Type	Name List	AMOXICULUN 500 mg CAPSULE '01May23-04May23 Oral ferrous fumarate 300 mg (100 mg iron) TABLET '01May23-05Ju23 Oral Coals Active Goals (1) Cancelled Goals (1) Cancelled Goals Goal Nme Last Date Cancel Reason 01Jan2314 Patient declined 01Jan2314 Patient declined

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



(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 for any additional information or if you require assistance.