



## The \*eDOCSNL Provincial Preventive Care Plan

Original: February 20, 2023  
Updated: April 3, 2023

*Disclaimer: \*Please note that this guide is written based on the Telus Med Access EMR software  
(version 5.13.39) 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 (which is highlighted in green). Below this 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

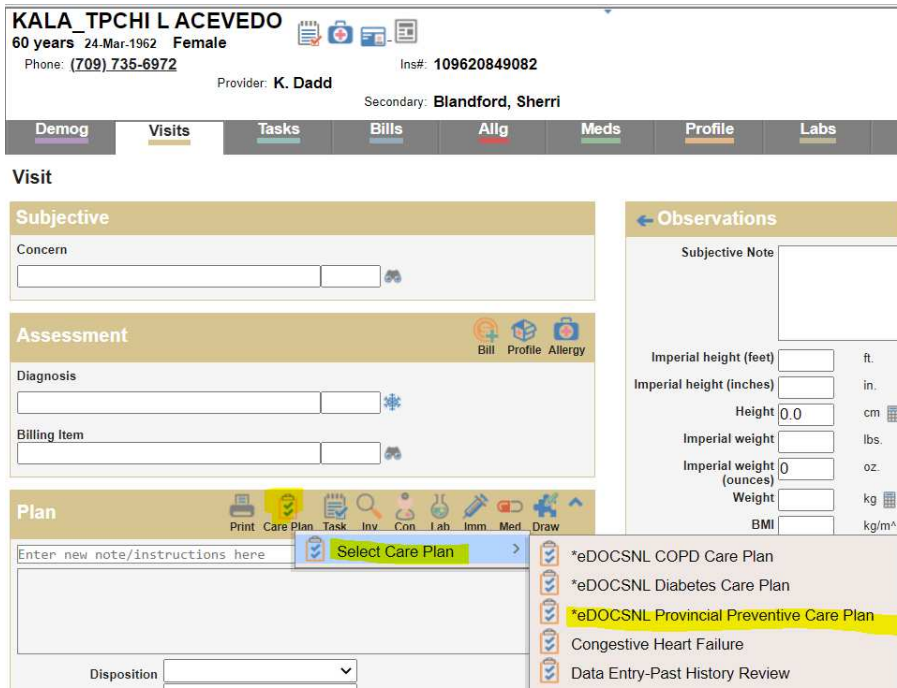
Please refer to **Appendix A** at the end of this document or contact [info@edocsnl.ca](mailto:info@edocsnl.ca) for assistance.

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

**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 checked="" 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

## 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						
25Jan23 07:03 AM	PAP Smear (NL) (Preventive Care Plan)	Lab, PAP SMEAR, PAP SMEAR Requisition, PAP Smear (NL) (Preventive Care Plan)							
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)							
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		
25Jan23	Normal			Bone Density	Investigation, Bone Density, Screening BMD (CH)				
20Jan23	Normal			Mammogram	Investigation, Mammogram, Screening Mammogram (WH)				
10Jan23	Normal			Bone Density	Investigation, Bone Density, Screening BMD (LGH)				
10Jan23	Normal			Mammogram	Investigation, Mammogram, Screening Mammogram (LGH)				
10Jan23	Normal			Mammogram	Investigation, Mammogram, Screening Mammogram (EH)				
10Jan23	Normal			Bone Density	Investigation, Bone Density, Screening BMD (EH)				
10Jan23	Normal			Mammogram	Investigation, Mammogram, Screening Mammogram (CH)				
10Jan23	Normal			Bone Density	Investigation, Bone Density, Screening BMD (WH)				
<b>Consults</b>									
<b>Active Requests</b>									
Date	Urgency	Ordering Provider	Service Provider	Type	Description	Reason	Observation Status		
08Feb23	Normal			Endoscopy	Consult, Endoscopy, Request for Endoscopy Consultation (LGH LHCLWHC)				
20Jan23	Normal			Endoscopy	Consult, Endoscopy, Request for Endoscopy Consultation (EH)				
11Jan23	Normal			Pharmacist	Consult, Pharmacist, Pharmacy Consult for Medication Review and Education				
11Jan23	Normal			Endoscopy	Consult, Endoscopy, Request for Endoscopy Consultation (LGH CCMH)				
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.

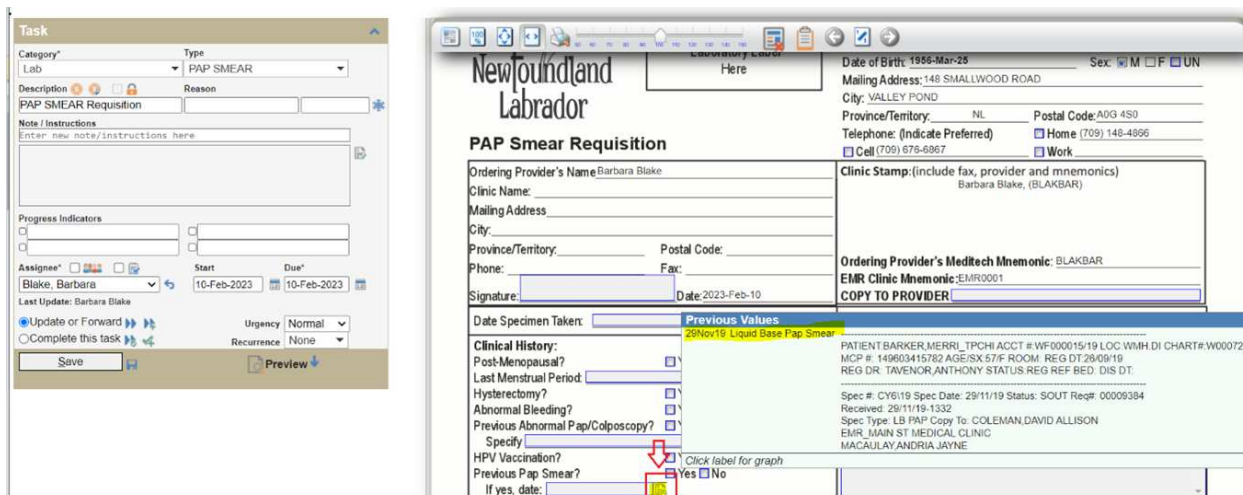
NOTE: As a feature only available from within the \*eDOCSNL Preventive Care Plan, some additional enhancements have been added to the Tasks. These enhancements are not available in the same Tasks if applied from outside of the \*eDOCSNL Preventive Care Plan. These features include:

### **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.



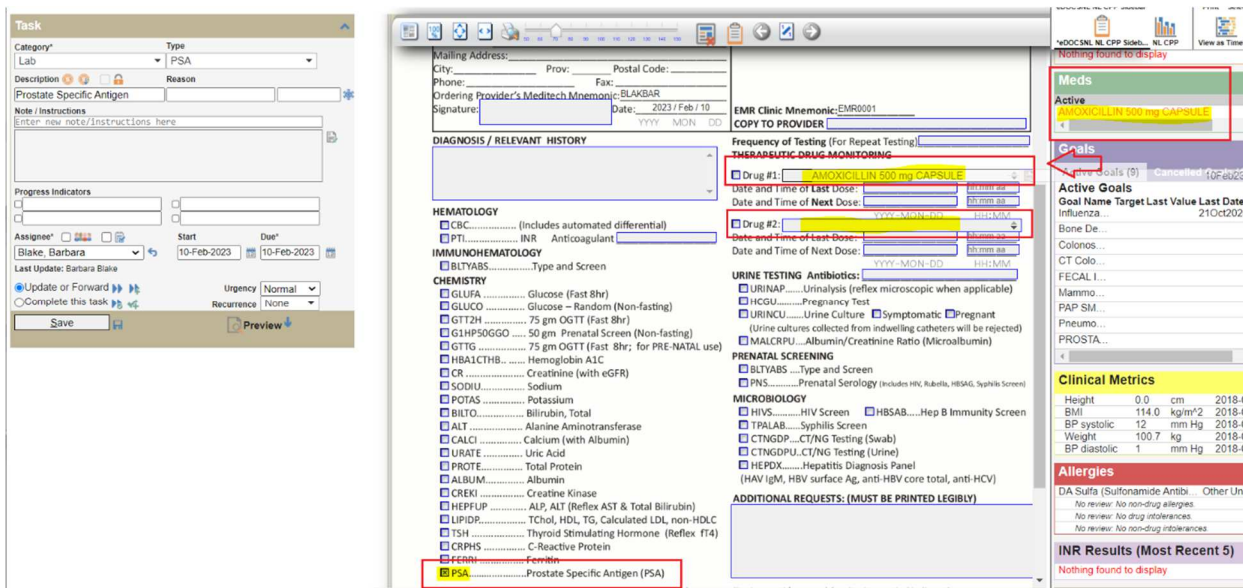
(Result is fictitious and for illustration purposes only)

**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.





## 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 details, 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 Sulfis (Sulfonamide Anti..." 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.

This screenshot shows a task form titled 'Request for Endoscopy Consult'. The 'Category' is 'Consult' and the 'Type' is 'Endoscopy'. The 'Description' field contains 'Request for Endoscopy Consult'. The 'Note/Instructions' field is empty. The 'Assignee' is 'Blake, Barbara'. The 'Start' date is '10-Feb-2023' and the 'Due' date is '10-Feb-2023'. The 'Urgency' is 'Normal'. There are 'Save' and 'Preview' buttons at the bottom.

This screenshot shows a 'REQUEST FOR CONSULTATION - Adults only' form for an endoscopy. The patient is LAVERN, TPCHI KAUFMAN. The form includes sections for Patient Information, Physician Information, Urgent and Non-Urgent indications, Screening indications, and Clinical Information. The 'Screening (Indications)' section has 'Screening colonoscopy' selected. The 'Allergies' field at the bottom contains 'DA Sulfis (Sulfonamide)'. A red box highlights this field, and a red arrow points from the sidebar on the right towards it.

This screenshot shows a patient profile sidebar for LAVERN, TPCHI KAUFMAN. It includes sections for 'Active Goals', 'Clinical Metrics', and 'Allergies'. The 'Allergies' section lists 'DA Sulfis (Sulfonamide) Anti...' as an allergy. The sidebar also shows 'Meds' and 'Goals' sections.

### Consult, Pharmacy Consult for Medication Review and Education

Similarly, the Allergies field in the Medication Therapy Services Consult Requisition has been updated to be a text box to which Allergies can be drag and dropped from the Sidebar:

This screenshot shows a task form titled 'Pharmacy Consult for Medication'. The 'Category' is 'Consult' and the 'Type' is 'Pharmacist'. The 'Description' field contains 'Pharmacy Consult for Medication'. The 'Assignee' is 'Blake, Barbara'. The 'Start' date is '10-Feb-2023' and the 'Due' date is '10-Feb-2023'. The 'Urgency' is 'Normal'. There are 'Save' and 'Preview' buttons at the bottom.

This screenshot shows a 'Medication Therapy Services Clinic Patient Referral Form'. The patient is LAVERN, TPCHI KAUFMAN. The form includes sections for Patient Information, Referring Healthcare Provider Information, and a section for 'Does the patient know you are referring him/her to the MTS Clinic?'. The 'Allergies' field at the bottom contains 'DA Sulfis (Sulfonamide)'. A red box highlights this field, and a red arrow points from the sidebar on the right towards it.

This screenshot shows a patient profile sidebar for LAVERN, TPCHI KAUFMAN. It includes sections for 'Active Goals', 'Clinical Metrics', and 'Allergies'. The 'Allergies' section lists 'DA Sulfis (Sulfonamide) Anti...' as an allergy. The sidebar also shows 'Meds' and 'Goals' sections.



**Task**

Category: Consult Type: Pharmacist

Description: Pharmacy Consult for Medication Reason:

Note/Instructions: Enter new notes/instructions here

Progress Indicators:

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

Last Update: Barbara Evans

Urgency: Normal

Recurrence: None

Buttons: Save, Preview

Recovery Craft Server: 02:48 AM 13-Feb-2023

**Reason for Referral (check all that apply):**

Comprehensive medication therapy assessment  Simplify medication therapy regimen

\*NEW\* Deprescribing assessment  Adherence issues

Suggest management of chronic disease or symptoms  Suspected adverse drug reaction

Please specify:  Please specify:

Requires education about medications  Other:

Please specify:  Please specify:

Please provide any details/concerns which would help in our assessment:

**Medical Conditions:**

Cardiovascular disease:  Angina  Prior MI  Heart failure  Atrial fib  Other cardiac:

Diabetes  Hypertension  Dyslipidemia  CVA/neurological  Headache (type):

Renal-acute  Renal-chronic  Depression  Anxiety  Insomnia  Arthritis (type):

Asthma  COPD  GERD  Peptic ulcer disease  Pain (type):

Other:

**Medication related issues:**

Please list all community pharmacies the patient uses:

**Other issues (check all that apply):**

Allergies or Medication intolerances (Please specify):

Difficulty adhering to medications

Cognitive impairment (Please specify who is responsible for medication administration):

MOCC IN: NL CFP 6666 NL CFP View 24 Timeline

**Active Goals**

Goal Name	Target	Last Value	Last Date	Next
Influenza...		210c2020		Over
Bone De...				Unki
Colonos...				Unki
CT Colo...				Unki
FECAL I...				Unki
Mammo...				Unki
PAP SM...				Unki
Pneumo...				Unki
PROSTA...				Unki

**Clinical Metrics**

Weight	100.7	kg	2018-08-15
BP diastolic	1	mm Hg	2018-08-15
Height	0.0	cm	2018-08-15
BMI	114.0	kg/m <sup>2</sup>	2018-08-15
BP systolic	12	mm Hg	2018-08-15

**Allergies**

DA Sulf... (Sulfonamids, AmBi)... Other Unknown

No review: No non-drug allergies

No review: No drug intolerances

No review: No non-drug intolerances

**INR Results (Most Recent 6)**

Nothing found to display

**Labs**

29Nov19 LIQUID BASE... Lab, LIQUI...

**Investigations**

10Feb23	Investigation, Bone Density, Scree...
10Feb23	Investigation, Mammogram, Scree...
10Feb23	Investigation, Bone Density, Scree...
10Feb23	Investigation, Mammogram, Scree...
10Feb23	Investigation, Mammogram, Scree...

**Consults**

## Feature: Goals

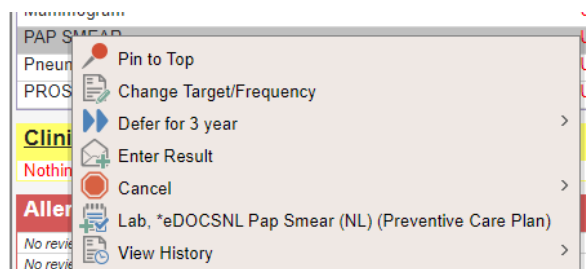
Individual patient goals can be set up from within the \*eDOCSNL Provincial Preventive Care Plan.

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	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:

Goal Management

PAP SMEAR: a Lab task with a type matching or description containing PAP SMEAR match on Responses

Add Observation [ ] %

Individualized Goal

Reason: Cervical Cancer Screening

Notes: [ ]

Associated Task: Lab, \*eDOCSNL Pap Smear ( )

Cancel this Goal [ ]

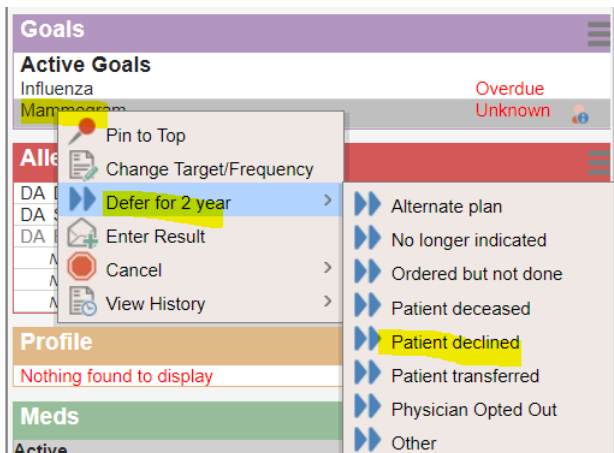
Cancel Reason: [ ]

Save

within the last: 3 year

- 30 week
- 32 week
- 34 week
- 36 week
- 38 week
- 40 week
- 46 week
- 50 week
- 1 month
- 2 month
- 3 month
- 6 month
- 9 month
- 1 year
- 2 year
- 3 year
- 4 year
- 5 year
- 6 year
- 7 year
- 8 year

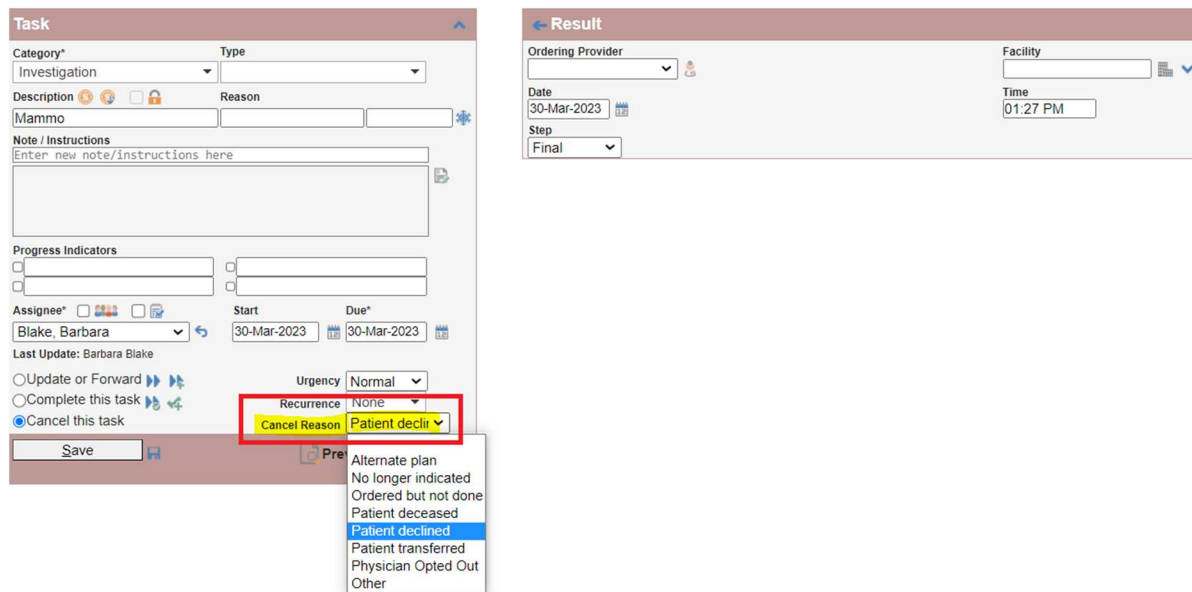
3. **Defer for “x year”** – based on the original screening interval set for the Goal, it can be Deferred for the same length of time. Selecting a Deferral requires also selecting a Reason:



Depending on the sidebar selected/defaulted to the user, and/or the configuration of the Goals widget in the sidebar, the Reason for the Deferral might not be readily visible. **Note:** the system automatically creates a Cancelled Result Task for the date that the Deferral is created and uses that date to Defer for the set period of time:



The Reason for the Deferral can be found in the Cancelled Result:



**Caution:** if a Note is added to a Deferred Goal after it is Deferred, it will re-set the goal back to an Active status with its original last date and cancel the deferred date:

Goal Management

Mammogram: an Investigation task with a type matching or description containing  match on  within the last

Add Observation

Individualized Goal

Reason

Note

Associated Task

Cancel this Goal

Cancel Reason

Save

Goals					
Active Goals (3)			Cancelled Goals		
Active Goals					
Goal Name	Target	Last Value	Last Date	Next Due	
Influenza			21Oct2020	Overdue	
Mammogr...				Unknown	
BMI	kg/m^2	1	05Oct2020	05Oct2023	

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:

Task

Category\*  Type

Description  Reason

Note / Instructions

Enter new note/instructions here

Progress Indicators

Assignee\*  Start  Due\*

Urgency  Recurrence

Save Preview

Result

Ordering Provider  Facility

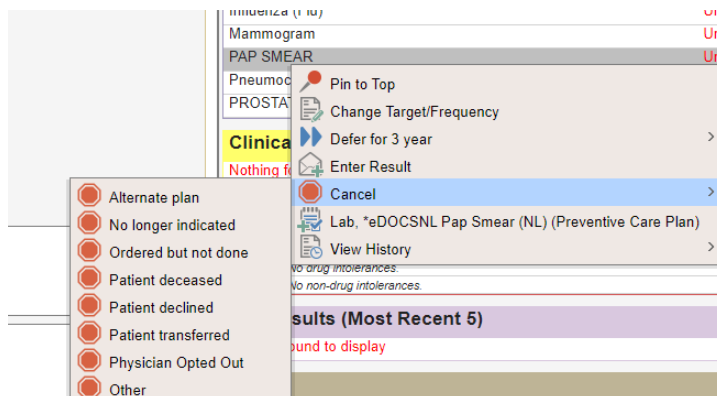
Date  Time

Step

Synopsis

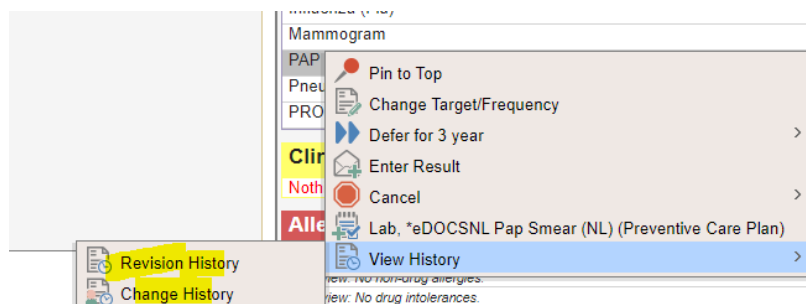
Send

5. **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.



6. **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.

7. **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.

Goals that were applied can be viewed from the sidebar view to the right of the patient visit template. Note: the specific sidebar view and features may be different depending on the selected/default sidebar in the user’s EMR:

**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.

The screenshot displays the EMR interface for a patient visit. The top navigation bar includes tabs for Demog, Visits, Tasks, Bills, Allg, Meds, Profile, Labs, Invest, Consults, Imm, Goals, and Appt. The main content area is divided into several sections:

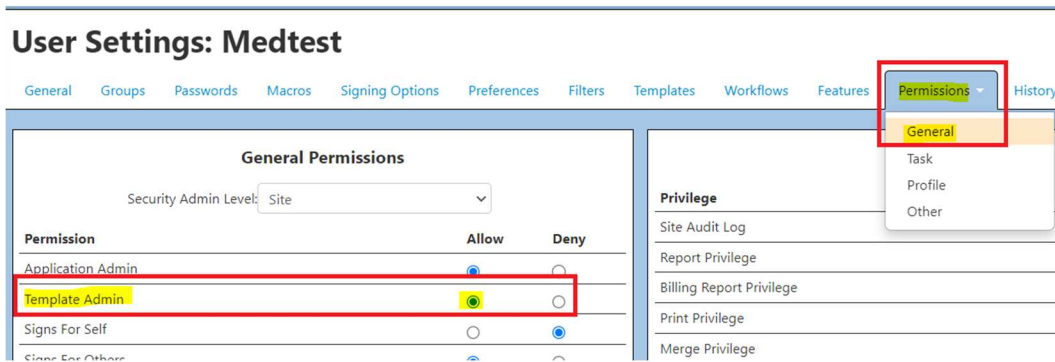
- Subjective:** Contains a 'Concern' field.
- Assessment:** Contains 'Diagnosis' and 'Billing Item' fields.
- Plan:** A list of tasks generated from a care plan, including 'Lab, P1P SMEAR, P1P SMEAR Requisition, P1P Smear (HL) (Preventive Care Plan) assigned to Barbara Blake'. The text 'Lab, P1P SMEAR, P1P SMEAR Requisition, P1P Smear (HL) (Preventive Care Plan) assigned to Barbara Blake' is highlighted with a red box.
- Observations:** A form for recording patient data, including 'Imperial height (feet)', 'Imperial height (inches)', 'Height', 'Imperial weight (lbs)', 'Imperial weight (ounces)', 'Weight', 'BMI', 'Pulse', 'Regular?', 'BP', and 'Temperature'.
- Goals:** A sidebar view showing a list of active goals, including 'Bone Density', 'Colonoscopy', 'CT Colonoscopy/Colonogr...', 'FECAL IMMUNOASSAY T...', 'Influenza (Flu)', 'Mammogram', 'PAP SMEAR', and 'Pneumococcal vaccination'. The 'Last Date Next Due' column shows 'Unknown' for all goals.
- Clinical Metrics:** A section for clinical metrics, currently showing 'Nothing found to display'.
- Allergies:** A section for allergies, currently showing 'Nothing found to display'.
- INR Results (Most Recent 6):** A section for INR results, currently showing 'Nothing found to display'.
- Labs:** A section for lab results, currently showing 'Nothing found to display'.
- Investigations:** A section for investigations, currently showing 'Nothing found to display'.

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

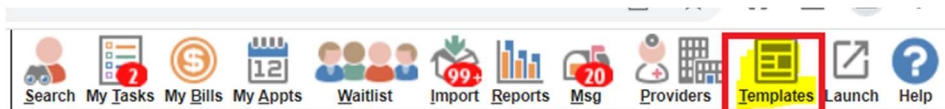


## Appendix A: How to Inactivate a Care Plan

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**:

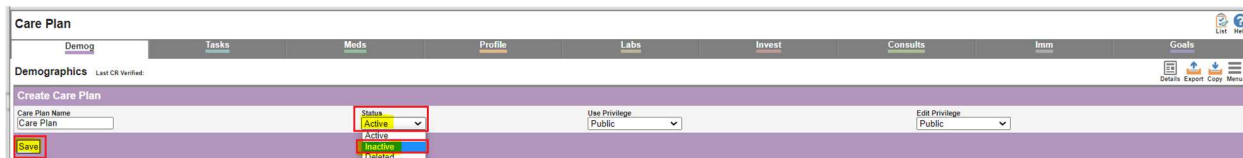


Select the **Care Plan** you want to inactivate:

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:

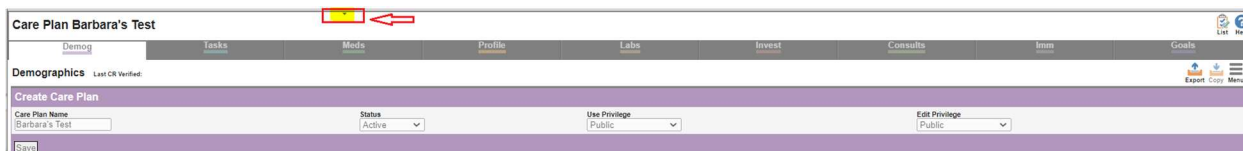
- a. If the **Status** not greyed out and is “Active”, pull down and select “Inactive” and the “Save”



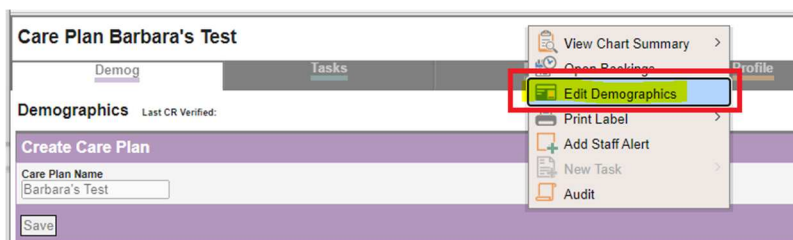
This will move the now inactive Care Plan down on the list to the Care Plans which are Inactive (denoted by a person with blue exclamation mark icon) in that EMR:

SU MG Care Plan, Care Plan	CARE PLAN	LOCAL
TEST CARE PLAN, Care Plan	CARE PLAN	LOCAL
TEST JH, Care Plan	CARE PLAN	LOCAL
test test, Care Plan	CARE PLAN	LOCAL
Tina's Care Plan, Care Plan	CARE PLAN	LOCAL
A-T's Care Plan, Care Plan	CARE PLAN	LOCAL
Arthritis (Early RA), Care Plan	CARE PLAN	LOCAL
Asthma, Care Plan	CARE PLAN	LOCAL
AT Care plan, Care Plan	CARE PLAN	LOCAL
AT Care plan, Care Plan	CARE PLAN	LOCAL
AT Care plan, Care Plan	CARE PLAN	LOCAL
AT Care plan, Care Plan	CARE PLAN	LOCAL
AT Care plan, Care Plan	CARE PLAN	LOCAL
AT Care plan, Care Plan	CARE PLAN	LOCAL

b. If the **Status** is greyed out as per below, hover the cursor to the right of the care plan name in the white space until you see a very small blue chevron (down arrow) and right-click with the mouse:



From the list – select “Edit Demographics”:



Update **Patient Status** from “Active” status to “Inactive” and then click on “Save” at the bottom of the page. This will remove the care plan from the active list and users will no longer be able to select it.

**Update Patient**

**Identification**

Last Name\*  First Name\*  Middle  Prefix  Suffix  Name Type

Chart #  DOB\*  Gender\*  Marital Status

Primary Identifier Number  Primary Identifier Type 'Group'  Expiry Date  Patient Status

**Address & Phone**

Address  City  Province  Name Type

Country  Designation, Addressee  Address Type 'Group'

Area  Number  Ext  Comment  Phone Type 'Group'

**Care Assignment & Notes**

Rostered?  Yes  No

Primary Provider  Secondary Provider  Provider Group

Referring Provider  Family Provider  Effective

First Appt  Last Appt  Consent  Confidential

Paper chart superseded: LG:CMH -  Allg  Meds  Profile  All

Similar to the above example, 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.