Getting Started with the PSS Clinic Toolkit

TELUS PS Suite EMR

Introduction

The OntarioMD (OMD) Insights for Care (i4C) Dashboard was sunset effective September 30, 2024. The i4C Dashboard, a tool integrated into various certified EMR systems like TELUS (PSS) and QHR (Accuro®), has been an important resource for clinicians, providing valuable insights from EMR data for population and individual patient care management.

OMD has developed the PSS Clinic Toolkit within TELUS PSS that replicates some of the functionalities of the i4C Dashboard.

The toolkit provides immediate access to reports based on patient information and provides valuable insights that lead to improvement in guideline adherence and patient outcomes. Patient lists are easily and efficiently produced directly from reports.

Currently, there are no plans to develop a toolkit for QHR (Accuro®). Clients using OMD-certified EMRs who need support can contact OMD Advisory Service for assistance with gaining practice insights tailored to their needs.

Steps to use the toolkit:

1. **Download and extract the zipped file** to a location accessible to your TELUS PSS instance.
2. **Import searches, custom forms, and handouts** to appropriate locations in your TELUS PSS instance.
3. **Import and modify the reminder** to meet your clinical needs. Creating a dedicated fictitious patient chart is recommended, which will allow access to the toolkit, and modify the reminder to link to that patient and any users to whom the toolkit should display.
4. **Define Provider:** To run a search, the user is prompted to enter an MD/NP number to filter the results for the chosen provider. Familiarizing yourself with the MD/NP numbers required before launching the searches is recommended.

Who Benefits?

Clinicians will directly benefit from tool. The management of patients, creation of recalls, and follow-up tasks is simplified.

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How is it Used?

The toolbar is comprised of a series of indicator categories, each containing one or more metrics (searches). The name of each metric indicates which segment of your patient population is being tracked.

List of Indicator Categories

- Patient Panel
- Childhood Immunizations
- Diabetes
- CAD
- Smoking Status
- Cancer Screening
- Adult Immunizations
- Hypertension
- Adult Obesity
- Opioids

Step 1: Download

If you have not downloaded the toolkit (zip file) already, download the zip file from the OMD Educates website and extract the files to a folder accessible by your TELUS PSS instance.

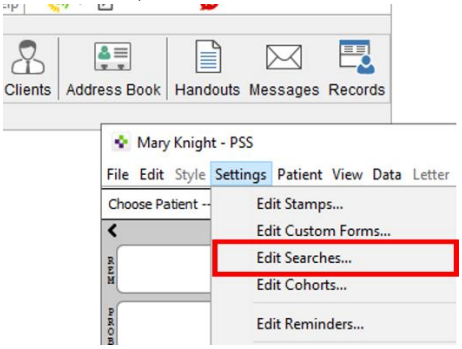
The toolkit contains:

1. **PSS Clinic Toolkit Toolbar Custom Form:** Labeled as "PSS Clinic Toolkit - Toolbar - Care Indicators", this custom form serves as the main toolbar and primary access point for the toolkit.
2. **Patient Drill Down Searches:** 143 searches that replicate the i4C patient drill downs.
3. **Care Indicator Custom Forms:** 10 custom forms embedded in the main PSS Clinic Toolkit toolbar, each linked to a specific care indicator and relevant searches related to that specific indicator.
4. **OntarioMD Preventive Screening Tracking Custom Form:** An optional custom form for tracking cervical, breast, and colorectal screenings.
5. **Lab Requisition Custom Forms:** Two optional custom forms for ordering FIT or HPV tests, launched from the OntarioMD Preventive Screening Tracking Form.
6. **PSS Clinic Toolkit Reminder:** A reminder to activate the toolbar; it's recommended to modify this to fit your clinic's needs (e.g., define which users can access the toolbar and create a fictitious patient chart for display).
7. **Handouts:** 11 help files stored in the handout section of your PSS instance, embedded in and accessible from the main PSS Clinic Toolkit toolbar for your reference while using the toolkit.

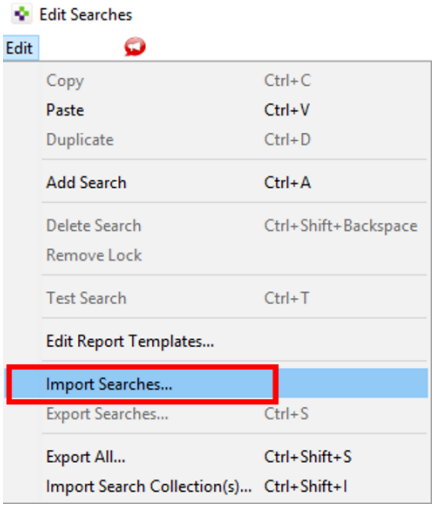
Import Searches:

1. Open your TELUS PSS

2. In the EMR, from the **Records** window, choose **Settings > Edit Searches**.



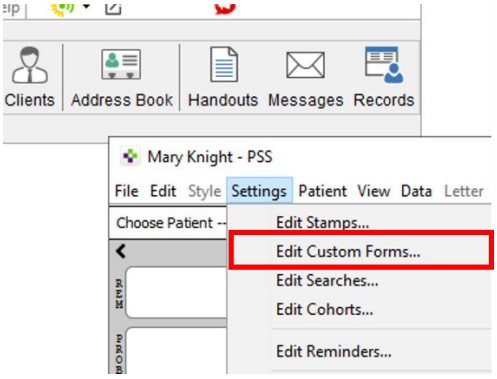
3. In the new window that opens, click **Edit > Import Searches**.



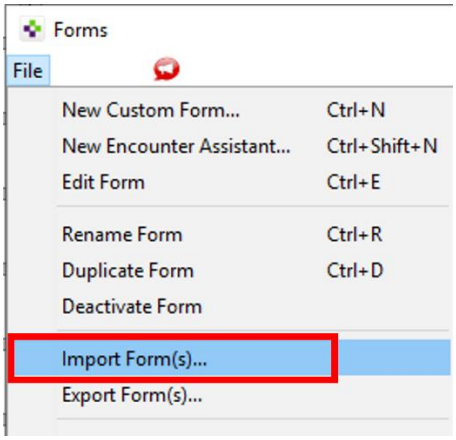
4. Using the dropdown menu, navigate to the location of the saved **'PSS Clinic Toolkit' folder**.
5. Click the **Searches folder** to open.
6. Click the first search and press **'Ctrl' + 'A'** to select all searches.
7. Click **Choose**.
8. Once imported, a window will display **'Successfully Imported'**.
9. Click **OK.**

Import Custom Forms:

1. Open your TELUS PSS
2. In the EMR, from the **Records** window, choose **Settings > Edit Custom Forms**.



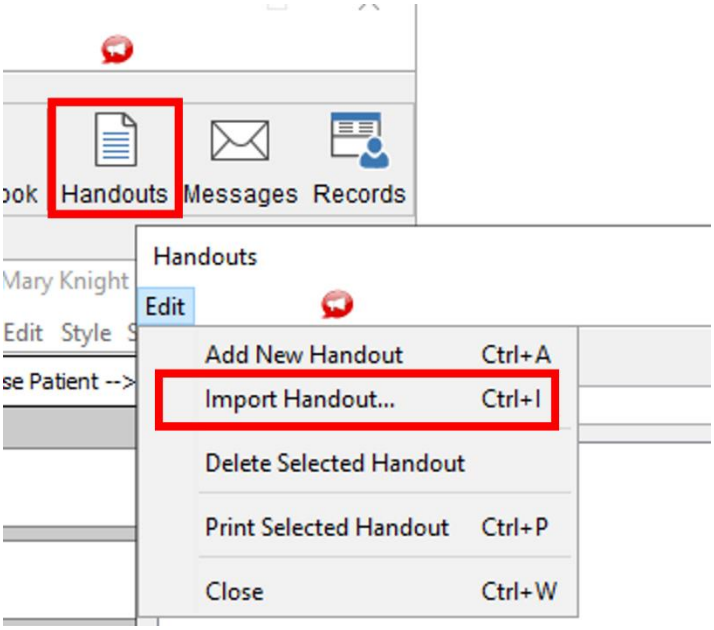
3. In the new window that opens, click **File > Import Form(s)**.



4. Using the dropdown menu, navigate to the location of the saved **'PSS Clinic Toolkit' folder**.
5. Click the **Custom Forms folder** to open.
6. Click the first custom form and press **'Ctrl' + 'A'** to select all forms.
7. Click **Choose**.
8. Once imported, a window will display **'Successfully Imported'.**
9. Click **OK.**

Import Handouts:

1. Open your TELUS PSS
2. From the main TELUS PSS window, choose **Handouts.**
3. In the new window that opens, click **Edit > Import Handout.**

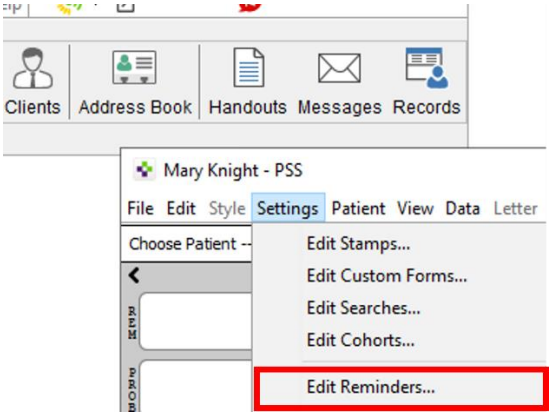


4. Using the dropdown menu, navigate to the location of the saved **'PSS Clinic Toolkit' folder.**
5. Click the **Help File folder** to open.
6. Click one help file and click **Choose** to import.
7. Once imported, the handout will display in the handout list.
8. **Repeat steps 4 through 7** until all help files have been imported.
9. Click **Done.**

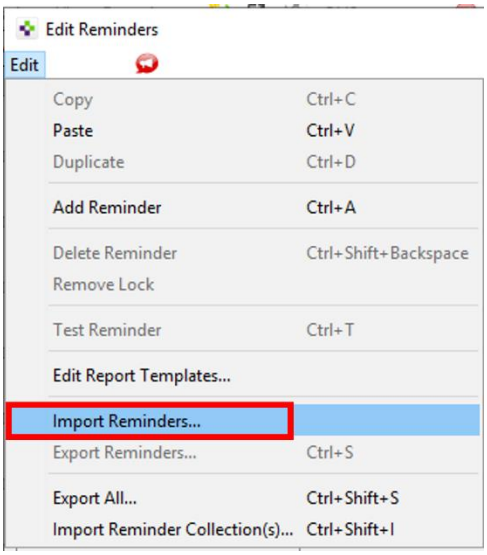
Step 3: Import and Modify Reminder

Import Reminder:

1. Open your TELUS PSS
2. In the EMR, from the **Records** window, choose **Settings > Edit Reminder**.



3. In the new window that opens, click **Edit > Import Reminder**.



4. Using the dropdown menu, navigate to the location of the saved **'PSS Clinic Toolkit' folder**.
5. Select the **Reminder folder**.
6. Click to highlight the **'PSS Clinic Toolkit Reminder.srx'** file.
7. Click **Choose**.
8. Once imported, a window will display **'Successfully Imported'.**
9. Click **OK.**
10. **Modify** the reminder to suit your clinic requirements.

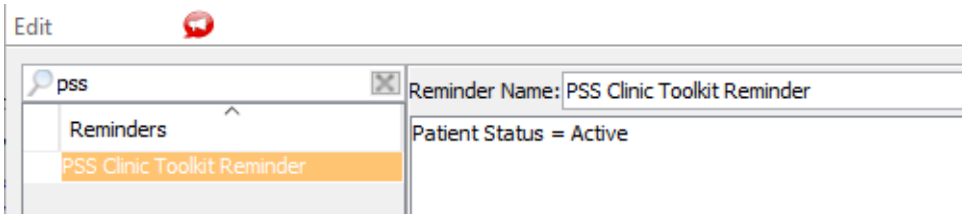
Modify Reminder:

Once the tool has been imported into your PSS EMR, by default it will show up for all Active Patients and everyone will have access to the toolbar. To limit access, you would need to modify the reminder. *OMD recommends* attaching the toolbar to a 'Test' or fake patient in your PSS EMR.

***Additionally*,** you can add a user initials or other criteria so the toolbar will show only when appropriate.

To modify the reminder:

1. From Patient Records Window, select **Patient** > **Edit Reminders.**
2. Locate and select the **PSS Clinic Toolkit reminder**.



3. Select **Add Line** to add criteria to the reminder.

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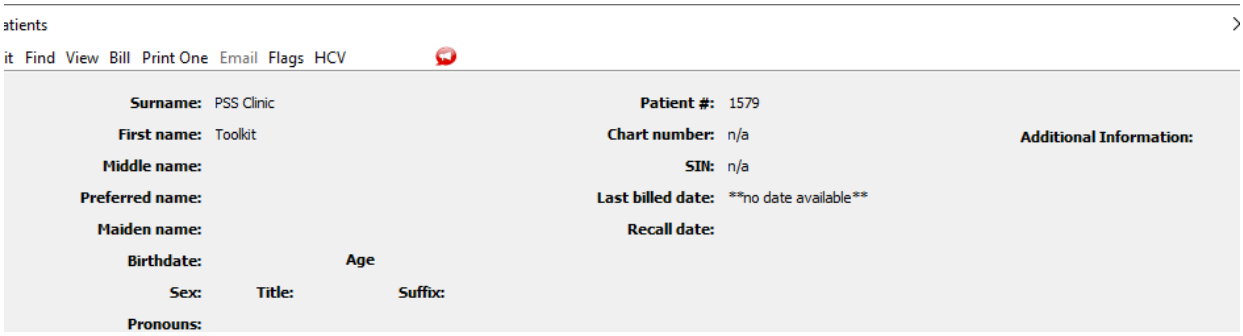
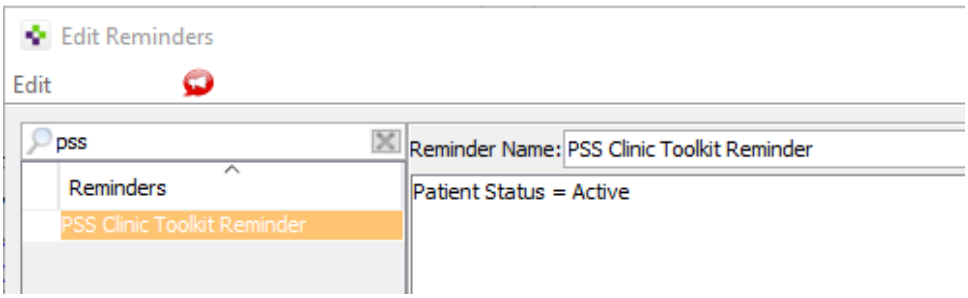
4. Click **Done** when finished.

Modify reminder with a Fake Patient: (optional)

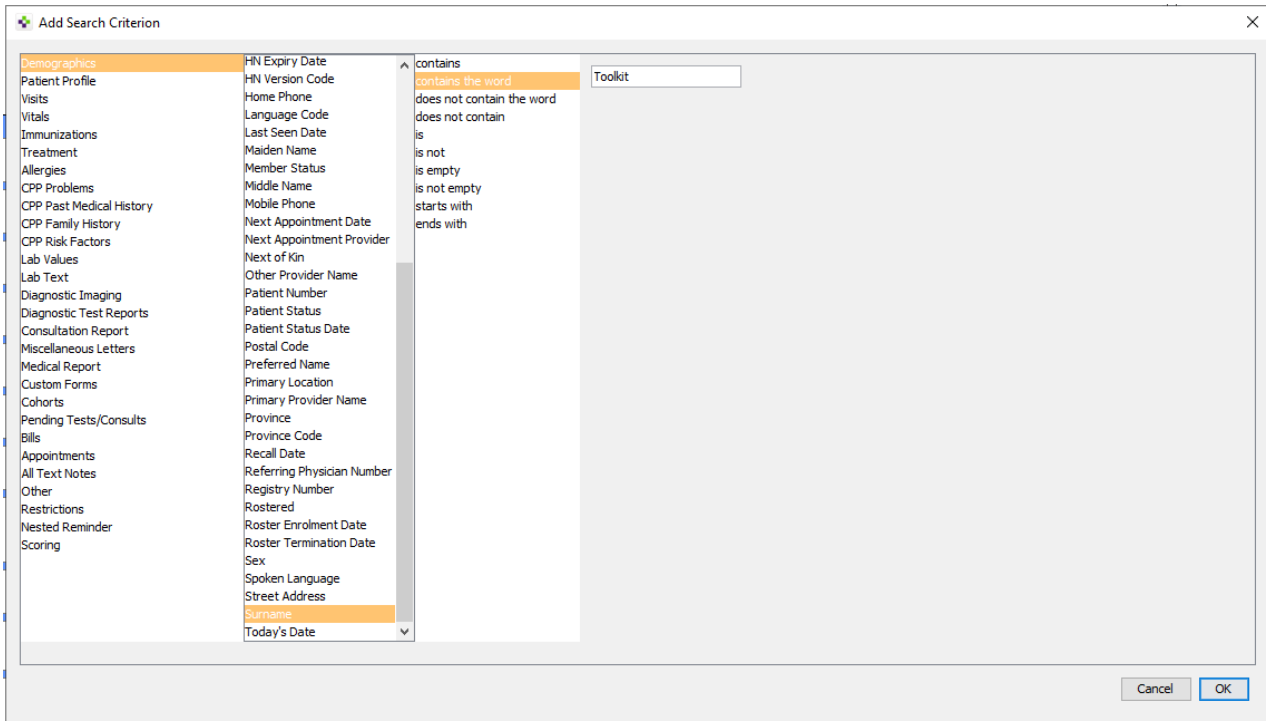
5. Add a new fake patient record with a name you will be able to easily identify.



6. From Patient Records Window, select **Patient** > **Edit Reminders.**
7. Locate and select the **PSS Clinic Toolkit reminder**.



8. Click **ADD Line**, Select **Demographics** > **Surname** > **contains the word**.



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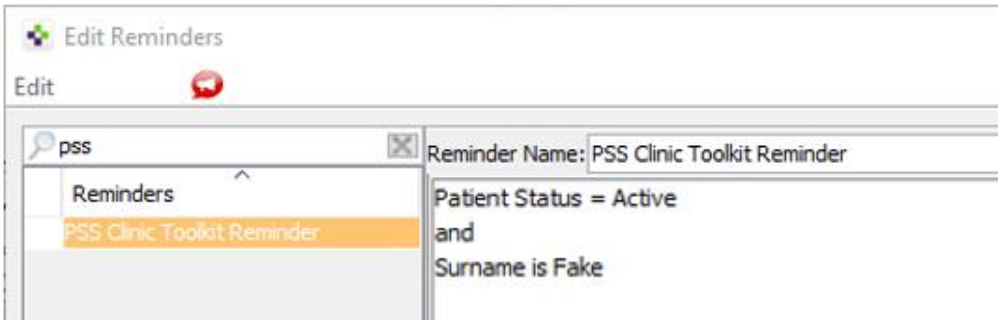
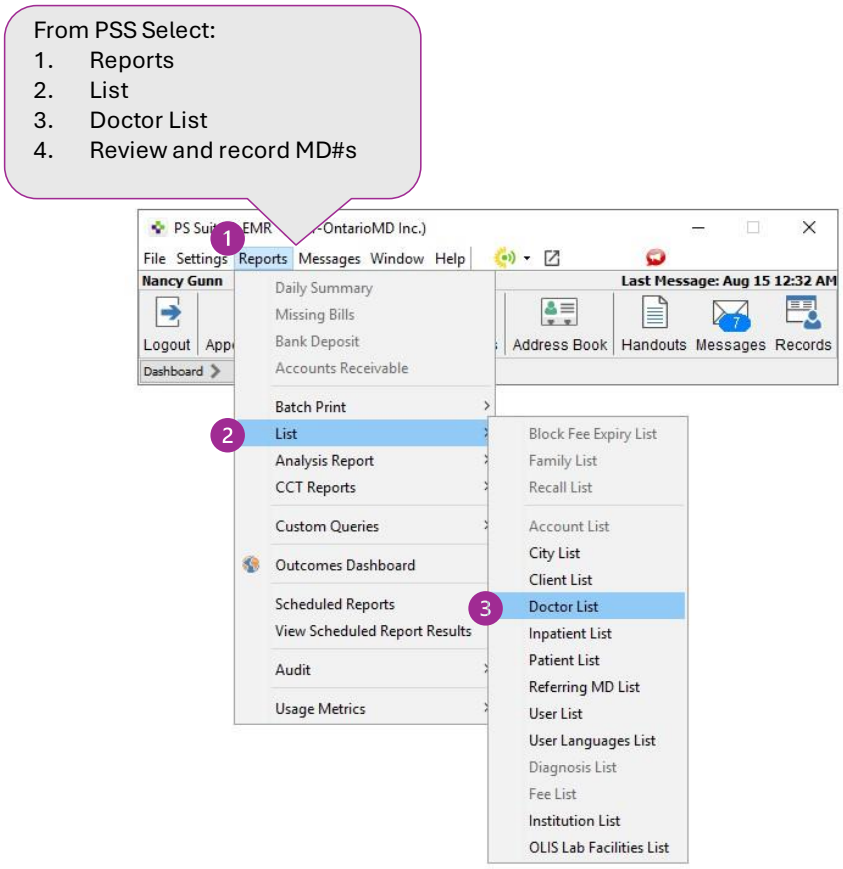
9. Type in the last name of your Fake Patient (e.g., Dashboard).
10. Click **OK**.

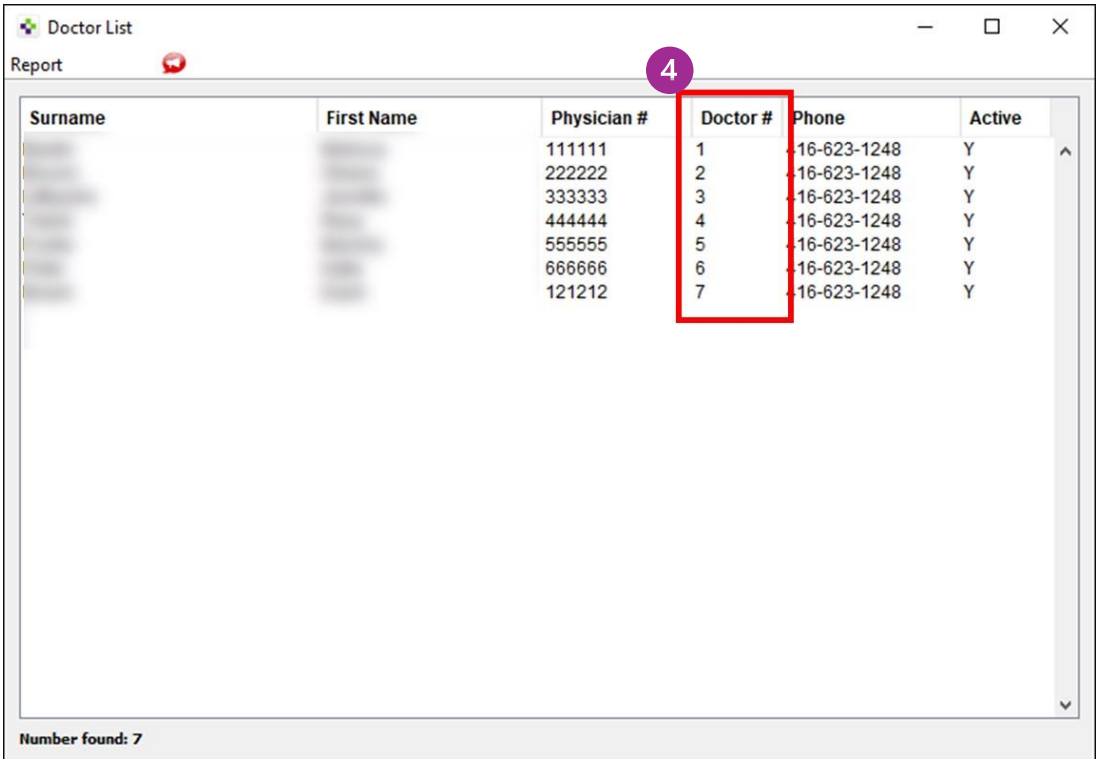


11. Click **Done**.

Step 4: Define Provider

1. From PSS Main Dashboard, select **Reports** > **List** > **Doctors List**.
2. Review and record your clinician MD#.





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