

Welcome to OntarioMD PSS Clinic Toolkit.

The **OntarioMD (OMD) PSS Clinic Toolkit** is designed to help support your population health management and the quality of EMR data. It provides a real-time representation of your EMR data using recognized primary care indicators. The OMD PSS Clinic Toolkit can assist you in identifying and tracking trends within your patient population. You can view your own patient data contained in your EMR to take immediate steps to address patient care.

You can receive hands-on support from OMD's quality improvement and EMR experts through the [OMD Advisory Service](#). To access support or to provide feedback on your experience, contact us at 1-866-744-8668 or support@ontariomd.com.

Physicians: please include your OMA number in all email requests.

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Introduction

The **OMD PSS Clinic Toolkit** is a data tool that provides immediate access to reports based on patient information. This OMD PSS Clinic Toolkit provides valuable insights that lead to improvement in guideline adherence and patient outcomes. The toolkit reports provide current statistics and patient lists are easily and efficiently produced directly from these reports.

Who Benefits?

Providers will directly benefit from **OMD PSS Clinic Toolkit**. The management of patients, creation of recalls, and follow-up tasks is simplified. Quality improvement is easily tracked through data export and trend monitoring.

Staff will also find the OMD PSS Clinic Toolkit to be a time saver. Reports on patient populations and potential recalls provide a convenient high-level overview of activities to be done.

How is it Used?

Accessible through a TELUS PSS toolbar and using native functionality, the **OMD PSS Clinic Toolkit** is comprised of a several indicator categories, each containing one or more searches. The name of each search indicates which segment of your patient population is being tracked. Patient counts are provided when generating the reports.

Searches are based on specific data entry requirements. If a patient population appears to be too high or too low, data cleanup might be required.

List of Indicator Categories

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

Accessing OntarioMD PSS Clinic Toolkit

The **OMD PSS Clinic Toolkit** provides general practice and clinical reports. The OMD PSS Clinic Toolkit presents as a toolbar with clickable buttons, each representing distinct categories of indicators. We recommend that users create a fictitious patient chart and configure the toolbar to display in it only or the toolbar can be configured to display across all patient charts if preferred.

If you require further assistance, please contact us at 1-866-744-8668 or support@ontariomd.com.

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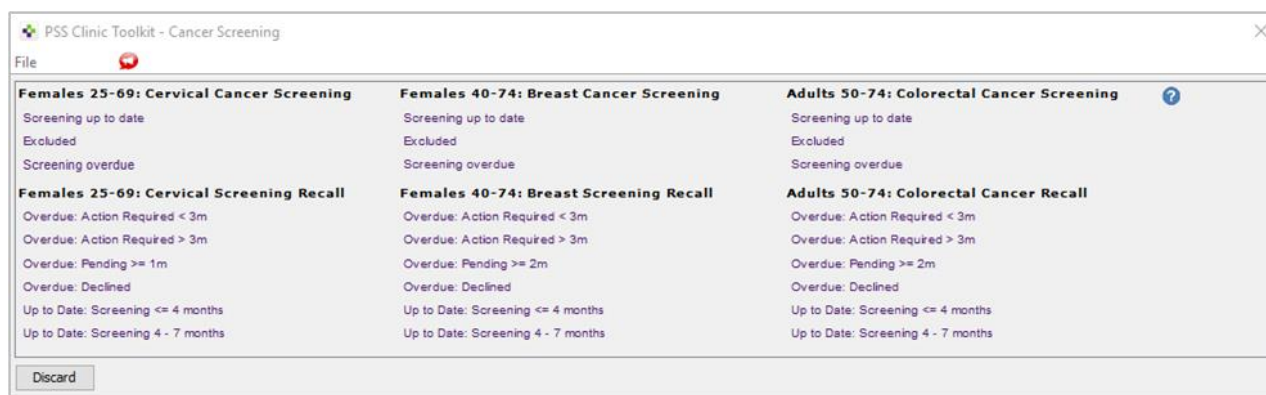
OntarioMD PSS Clinic Toolkit View

The toolkit presents as a toolbar with clickable buttons, each representing distinct categories of practice and clinical indicators.



Clicking on a category from the toolbar opens a window with a list of related searches, each representing a population of patients that meet the specified criteria.

These searches empower users to identify patient populations, cleanse data and make informed decisions to enhance patient care.



Features

Help Files

On the main **OMD PSS Clinic Toolkit** toolbar, there is a general help file providing a high-level overview of the toolkit and its additional features. Click the help icon in the top right corner of the OMD PSS Clinic Toolkit toolbar for general help on using the tools.

Within each category, you will find specific help files related to each indicator. These help files provide detailed explanations of each indicator and required data elements. They are useful for ensuring you are recording the data as required and validate data accuracy and integrity in patient charts.

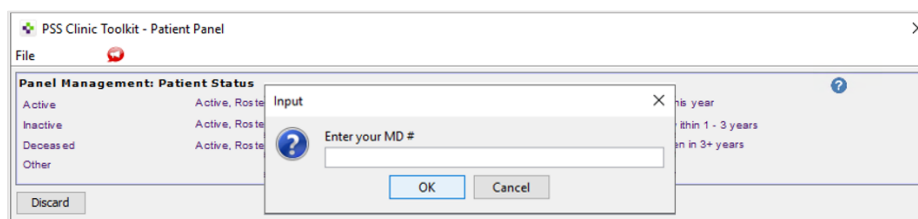
Icon	Description	Usage
	Help	Additional information about the toolkit indicator can be found by clicking this Help icon.

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Define Provider

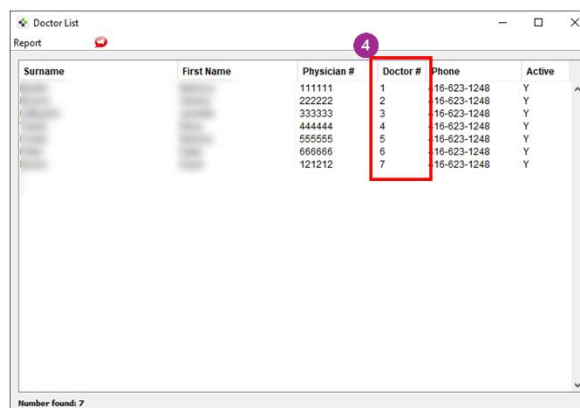
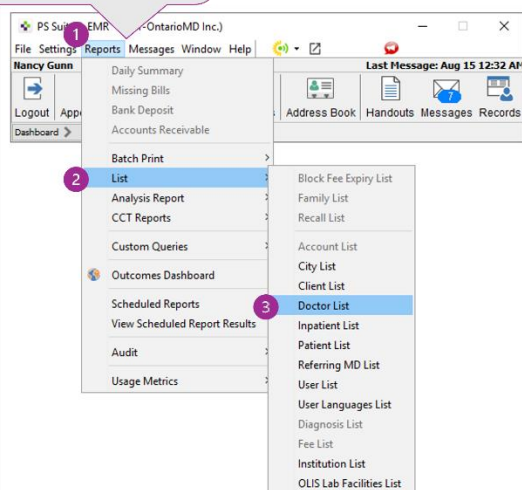
To run a search, the user is prompted to enter an MD/NP number to filter the results for the chosen provider.



To find the MD/NP number in TELUS PSS EMR go to: Reports > List > Doctor List.

From PSS Select:

1. Reports
2. List
3. Doctor List
4. Review and record MD#s



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Patient Drilldown

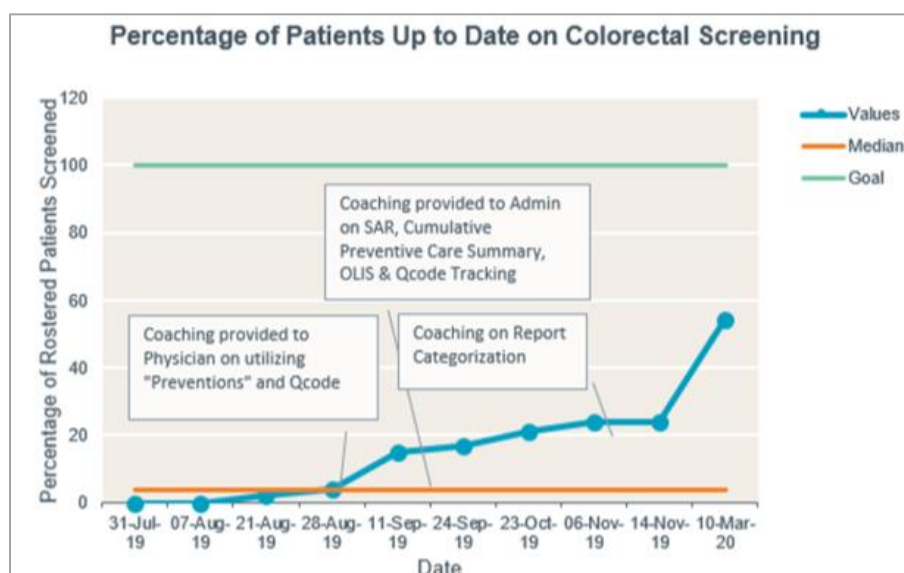
Reports generated by the searches provide quick access to patient lists. Click the name of a search to view a corresponding patient list. Patient lists are produced in real time and reflect the current patient population matching the search criteria of the indicator clicked.

First Name	Surname	PROB/Problem List/Problem List..."null"
Aldo	Godines	Diabetes Mellitus, 250: Diabetes Mellitus (ICD-9)Diabetes Mellitus, 250: Diabetes Mellitus (ICD-9)diabe...
Alejandra	Castellow	PRE Diabetespre diabetes, more information here, 249: Secondary Diabetes Mellitus (ICD-9)diabetes since ...
Alesia	Senavanh	diabetes, 250: Diabetes Mellitus (ICD-9)
Alex	Vause	NDDM
Alexandria	Sialana	T2D (2012)
Alexis	Rose	COPDT2D (Dr. Tester)
Ali	Oberer	diabetesdiabet
Alison	Litty	diabetes type II
Alonso	Wunsch	breast ca, crohnsdiabetes
Alphonse	Huotari	Diabetes Mellitus, 250: Diabetes Mellitus (ICD-9)diabetes, 250: Diabetes Mellitus (ICD-9)diabetes, 250...
Alphonse	Marsha	hypertension, 401.1: Benign Hypertension (ICD-9)Diabetes Mellitus, 250: Diabetes Mellitus (ICD-9)

After clicking to launch a patient list, use the tools within your EMR to perform additional tasks, such as create a recall or add a reminder to the patient's chart. This allows the **OMD PSS Clinic Toolkit** to be an actionable tool which can be incorporated into regular clinic processes like patient recalls. Please see 'Key Report Menu Functions' under 'Additional Options' for more information.

Trends and Progress Tracking

The data from the **OMD PSS Clinic Toolkit** reports can be exported in various formats, including TXT and CSV. Users can import this data into Excel or other software for analysis, tracking trends, monitoring progress, calculating percentage changes, and adding comments to document key activities and significant findings.



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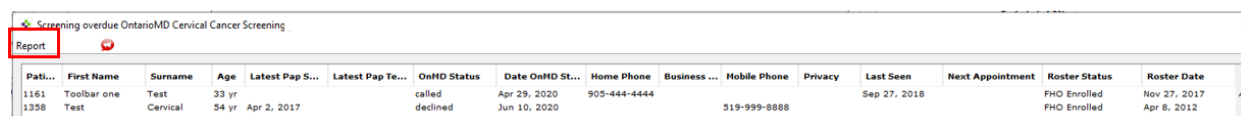
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Additional Options

Key Report Menu Functions

If you are not familiar with running searches and using the report menu functions, there are several features that will help with using the **OMD PSS Clinic Toolkit** to manage your patient population.

When you drill down to get a list of patients, the standard PSS report window will open with a list of patients. From the Report Menu, there are many options that are helpful for managing patient populations.



Pat...	First Name	Surname	Age	Latest Pap S...	Latest Pap Te...	OnMD Status	Date OnMD St...	Home Phone	Business ...	Mobile Phone	Privacy	Last Seen	Next Appointment	Roster Status	Roster Date
1161	Toolbar one	Test	33 yr			called	Apr 29, 2020	905-444-4444				Sep 27, 2018		PHO Enrolled	Nov 27, 2017
1358	Test	Cervical	54 yr	Apr 2, 2017		declined	Jun 10, 2020			519-999-8888				PHO Enrolled	Apr 8, 2012
1578	Test	Referral	37 yr			Referral	Jan 9, 2019			914-888-7777				PHO Enrolled	Jan 9, 2019

Batch Bill

This functionality allows you to generate a bill for all the patients found on a list. For more detailed information on how to use this functionality please review the PS Help (**Main toolbar Help ->Show Help**) on **Batch Billing from a Search**.

Add Problem

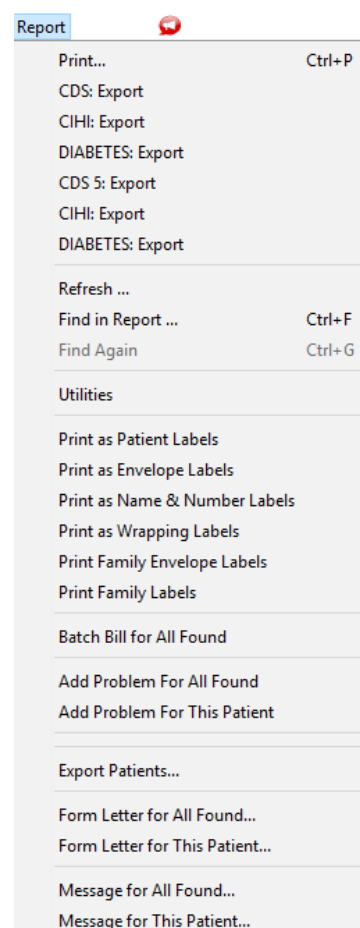
This functionality allows you to add a coded problem to the Patient Problem List for one patient, or for all in the drill-down list. For more detailed information on this functionality please review the **PS Help** on **Entering a Current Problem**.

Form Letter

This functionality allows you to generate an email or letter to one or to all the patients found on a list. Perhaps you want to send them information on the pneumococcal vaccination and would like them to call the office to book an appointment for follow-up. For more detailed information on this functionality, please review the **PS Help** on **Sending Form Letters**.

Message

This functionality allows you to generate messages to either a staff member to book the patient or to yourself as a reminder to discuss with the patient at their next visit. For more information on this



Report


- Print... Ctrl+P
- CDS: Export
- CIHI: Export
- DIABETES: Export
- CDS 5: Export
- CIHI: Export
- DIABETES: Export
- Refresh ...
- Find in Report ... Ctrl+F
- Find Again Ctrl+G
- Utilities >
- Print as Patient Labels
- Print as Envelope Labels
- Print as Name & Number Labels
- Print as Wrapping Labels
- Print Family Envelope Labels
- Print Family Labels
- Batch Bill for All Found
- Add Problem For All Found
- Add Problem For This Patient
- Export Patients... >
- Form Letter for All Found...
- Form Letter for This Patient...
- Message for All Found...
- Message for This Patient...

OntarioMD Preventive Cancer Screening Patient Tracking Tool

The tracking tool is intended to assist with the management of patients overdue or coming due for preventive cancer screening. This tool can be added to an existing toolbar, a customized toolbar, or added to your list of favourites in the quick access.

OntarioMD Preventive Screening Tracking					
Client name	Cervical Test	Age	54 yr	Sex	F
				Last OMD review	Sep 20, 2024
Service	Latest result	Last Action	Status	Notes	
Colorectal cancer	never done	Feb 23, 2025	Pending	Req sent to lab	Offer <small>eligibility Guidelines</small>
Cervical cancer	Jun 2, 2020	Oct 23, 2023	Declined	Not sexually active	Offer <small>eligibility Guidelines</small>
Breast cancer	Jun 6, 2023	May 23, 2025	Called	Left msg-req ready to send	Offer <small>eligibility Guidelines</small>

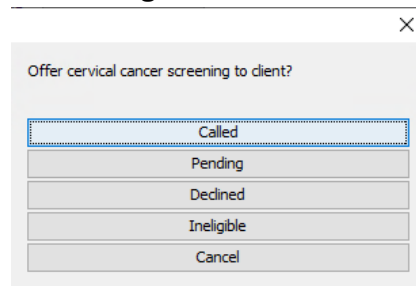
To access the form and insert into the patient chart, from Records, click Data, select 'Custom Forms' and type 'Ontario' in the search field. Select OntarioMD Preventive Screening Tracking and click 'Choose This Form'.

Additionally, the form can be added to your favourites by clicking on the  above the encounter notes and selecting 'Add to Favourites'. Choose 'Custom Form/EA/Toolbars', then search 'Ontario' and select the form from the drop-down list.

When the form is added to the chart, it automatically displays only the screening criteria relevant to the patient's age and sex.

To help identify patients who are overdue or coming due for screening, the Latest Result field uses visual indicators: a red circle around a date or the text "never done" signals that the screening is overdue, while a yellow circle indicates that the screening is coming due soon, in accordance with current cancer screening guidelines.

Clicking the offer button will provide you with the following options to track the status of the testing:



Called: Select this option when you contact the patient.

Pending: Select this option when you provide the requisition or perform the test.

Declined: Select this option if the patient declines testing.

Ineligible: Can be used to flag a patient as ineligible for pap screening (e.g., never sexually active).

Cancel: Closes the dialogue box.

When an Offer option is selected, the Last Action field automatically populates with the date, and the Status field reflects the selected option.

The colour of the date in the Last Action field provides an additional cue:

- Red: 12 months or more have passed since the patient was marked declined or ineligible.
- Yellow: The 12-month point since the patient was marked declined or ineligible is approaching.
- For patients marked as called or pending, red or yellow indicates the timeframe is overdue or coming due soon, based on the recommended cancer screening interval (e.g., every 2 or 3 years).

If a patient is marked as ineligible or declines screening, the reason can be entered and will appear in the Notes field. Similarly, if the patient is marked as called or pending, comments can be entered and will also display in the Notes field.

The Last Action and Status information is included in the corresponding columns of reports generated from searches, supporting ongoing tracking and follow up.

Updating Medication Interaction Preferences



Note: If you have not been coding problems with ICD or SNOMED disease codes, you will notice that once you start coding problems, you will get more medication warnings. These preferences are user-specific and can be edited. Ensure that these settings reflect your comfort level for warnings that you are receiving for the medication interactions.

1. From the Main toolbar choose the **Settings** menu and select **Preferences**.
2. Select **Interaction Preferences** and customize your settings as needed.

For more detailed information please review the **PS Help** file on **Setting interaction warning preferences**.

How to Code a Problem

The Chronic Disease Management searches depend on best practices for coding diseases (ICD-9, ICD-10, or SNOMED) in the Problem List. Here are some tips to quickly and efficiently code your problems.

New problem:

If you already know the disease code, the quickest method to code a new problem is to input the code directly into the description field. Press TAB to generate the standard description and automatically code the problem. You can then modify the auto-filled description or leave it unchanged. Finally, click 'Add to List' to save it.

The screenshot shows the 'Add To Problem List' dialog box. The 'Description (to fit in profile):' field contains the text '250', which is highlighted with a red rectangle. Below this is a 'Long Details (optional):' text area. The 'Status:' dropdown is set to 'Active'. There are two checkboxes: 'Include Start Date' and 'Include Resolved Date', both of which are unchecked. Below these is a section titled 'Associated Diagnoses' containing a list with one entry: '250: Diabetes Mellitus (ICD-9)'. At the bottom of this section are 'Remove' and 'Add...' buttons. The bottom of the dialog box features a 'Cancel' button on the left and an 'Add To List' button on the right, which is highlighted with a red rectangle.

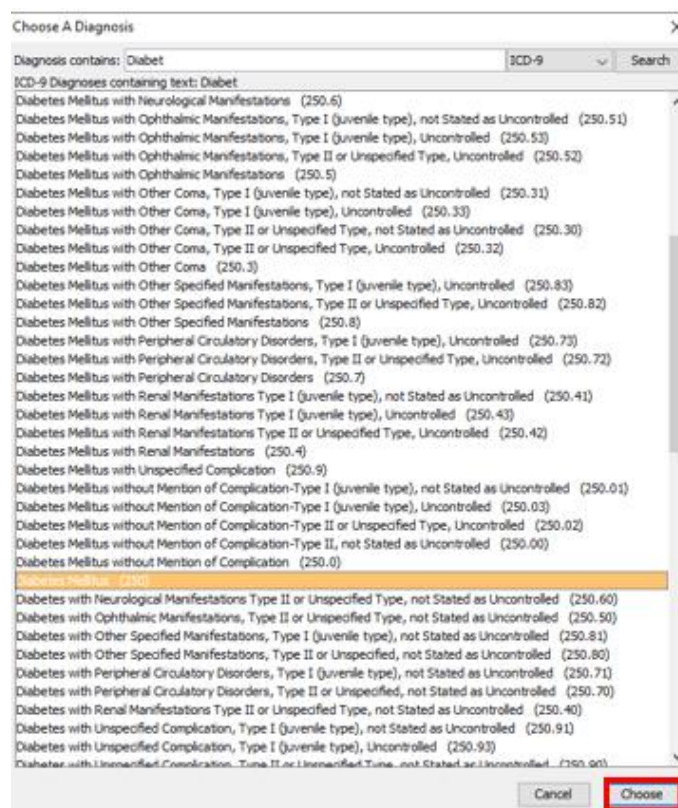
If you do not know the disease code, you can enter the name and click 'Add'.

This screenshot shows the same 'Add To Problem List' dialog box, but the 'Description (to fit in profile):' field now contains the text 'Diabet', which is highlighted with a red rectangle. The 'Long Details (optional):' text area remains empty. The 'Status:' dropdown is still 'Active', and the 'Include Start Date' and 'Include Resolved Date' checkboxes are still unchecked. The 'Associated Diagnoses' section is currently empty. The 'Remove' and 'Add...' buttons are at the bottom of this section, with the 'Add...' button highlighted by a red rectangle. The 'Cancel' and 'Add To List' buttons are at the bottom of the dialog box.

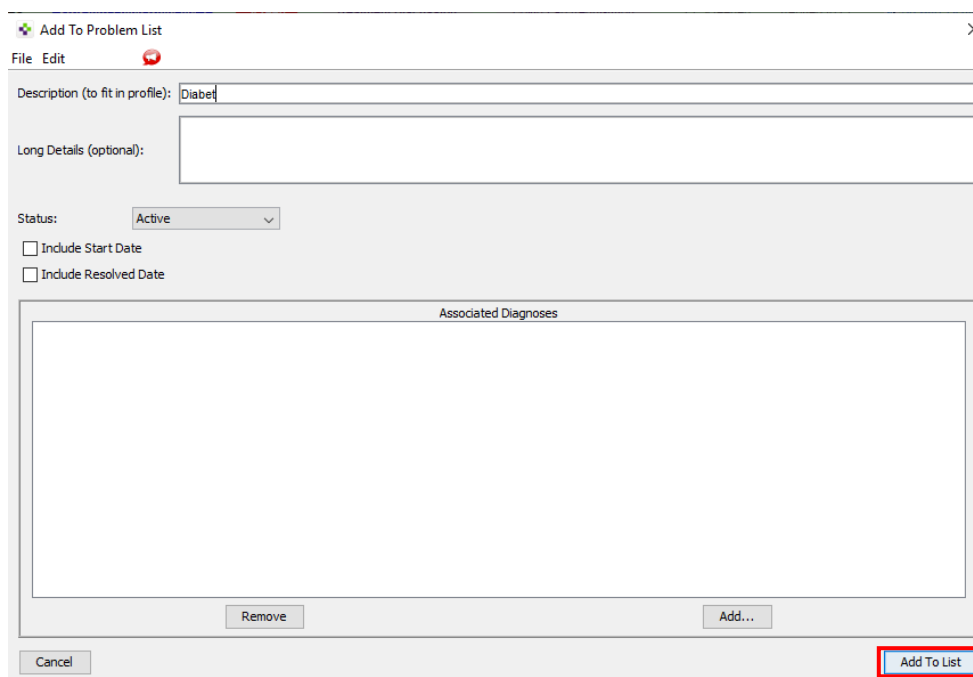
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This will present a drop-down list where you can choose the correct disease and click 'Choose'.



Click 'Add to List' in the bottom right of the Add to Problem List screen.

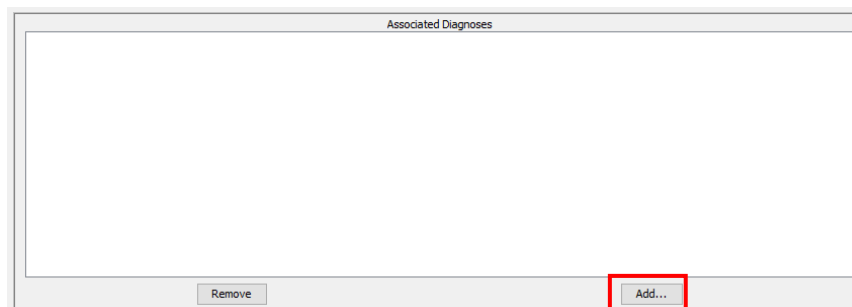


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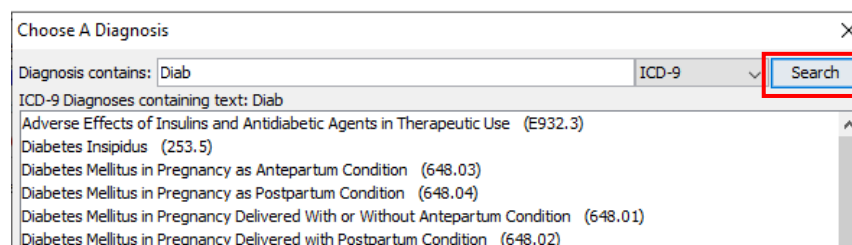
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To update an existing problem:

Double click on the existing problem in the Problem List and click on the 'Add' button below associated diagnosis.



You may need to change the text in the description or enter the appropriate code (i.e., 250 for diabetes) prior to searching for the code.



Once selected (code will be highlighted), click the 'Choose' button at the bottom of the window.

NOTE: All coded problems appear in black text in the problem list. Non-coded problems appear in blue.