

One:carepath Care Plan Template EMR Import Instructions

Developing a patient care plan with is a primary tool for the **one:carepath** pilot project. The project team has worked with each of the 5 conformed primary care EMR vendors in Alberta and created a template that is now available either via email or directly from the EMR vendor libraries. This template has been revised and improved upon with the help of physician advisors, patient advisors and specialists in various areas including Advance Care Planning (ACP). As you embark on the **one:carepath** project, follow the template import instructions to ensure that you have everything you need to begin creating care plans.

Template name - [one:carepath Care Plan](#)

Please deactivate previous versions of care plan templates from the EMR library of your clinic to avoid confusion (this can done from the menu under file, see screen shot below).

Make sure to review the template instructions specific to this EMR. Every EMR template is a bit different and fields mapped can look different depending on the EMR and sometimes can look different clinic to clinic based on how data is entered. If you don't have a Superuser in your clinic, reach out to your vendor if you have any difficulty importing or using your template.

How to add the care plan template to PS Suite EMR

Importing Instructions (From the emailed template)

1. Save the custom form files (.cfm files) that you were given to a folder on the desktop of your computer. If you were given the files in a compressed or zipped file, double-click the .zip file to unzip the folder (or right-click and choose to unzip).
2. From the Records window, choose Settings > Edit Custom Forms.
3. To import files by selecting them from a list, follow these steps:
 - a. In the Forms window, from the File menu, choose Import Form(s).
 - b. Navigate to your computer's desktop and double-click the folder that contains the custom form files.
 - c. Click the custom form in the list that you want to import.
 - d. Click the Choose button. If you are importing multiple forms at once, and depending on the speed of your computer, the import may take 30 seconds or more.

To import files by dragging and dropping, follow these steps:

1. Navigate to the desktop and double-click the folder that contains the custom form files to import.

2. Position both the folder window with your custom form files and the PS Suite Forms window that lists all of your existing custom forms side by side so that you can see both windows.
3. Drag the highlighted custom forms files from that folder on the desktop and drop the files in the custom forms window.

A message informs you whether the import was successful.

Importing Instructions (From the Knowledge Portal)

1. While signed into the EMR in the main toolbar select **Help**, then select **Show Help**
2. A new window will open to the TELUS PS Suite Help page
3. On the left-hand side under **Resource Center**, you will want to select **Configurable Content Library**
4. This will bring you to the **Configurable Content Libraries**, there will be two options to chose from you will want to pick **Custom Forms Library**.
5. There are 5 sections to choose from: *Canada-wide forms, Alberta forms, British Columbia forms, New Brunswick forms & Ontario forms*. You will want to select **Alberta forms** and the area will expand to show the forms in that section.
6. For each form there is a **Preview link** and a **Download link** and then the name of the form, the forms are in alphabetical order, the last column will show the last time the updated or if required the version of PS Suite your system must be updated to. (If you are unaware of your version, you can check it by going to the main tool bar, select **Help**, then **About PS Suite EMR®...** and you will get a pop up showing the version)
7. Once you find the form you want to upload into your EMR, select Download and it will automatically download the cfm file to your computer, and you will follow the instructions above to import the file.

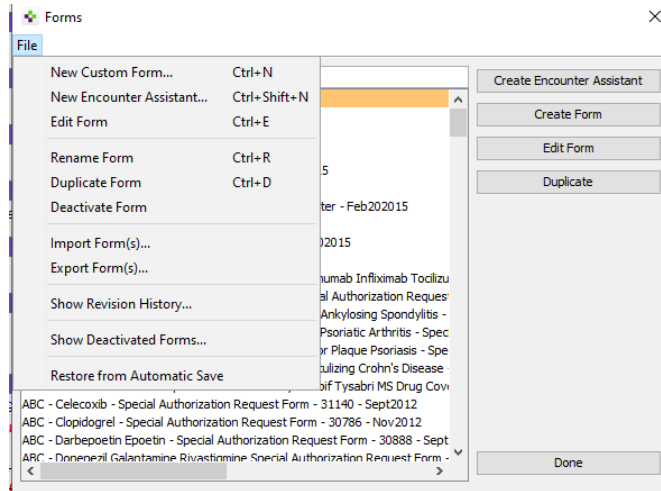
LINK --→ [Adding to your library 2 \(screencast.com\)](#)

Using the one:carepath Care Plan Template

The notes below are important configuration notes. There are modifications you may need to do in terms of how and where the information populates. Your clinic may have data entry practices that may require you to adjust these configurations.

- The Primary Care Provider name and Contact # pull information from the Patient MD / NP in the patient's demographics not the current user. The field is also editable so if a different physician or NP is completing the form it can be changed to their name.
- The Emergency contact name on the form pulls from the Next of Kin area in the patient's demographics, contact number will have to be added manually.

- Text fields do not expand so you are limited to the text area shown.
- User can TAB through form to get to next fillable area.



Please contact your vendor if you require any assistance loading this template into your EMR.