



Centre  
for Effective  
Practice

## Poverty: A Clinical Tool for Primary Care Providers | Set-Up Guide for Ocean & Telus PSS

### About the Ocean & Telus PSS EMR-Integrated Toolkit

The Centre for Effective Practice's Poverty: A Clinical Tool for PCPs custom-built Ocean and Telus PSS integrated toolkit leverages the Ocean tablet/kiosk technology to deliver patients with a validated poverty screening question and, if applicable, related follow up questions that automatically generates and populates a Telus PSS custom form with tailored advice, resources and services.

The Ocean and Telus PSS toolkit includes the following components

- CEP Providers - Poverty Screening Tool
- CEP Providers - Poverty - A Clinical Tool for PCPs
- CEP Provider - Poverty - Follow Up Reminder

The following instructions will help guide you through: (1) importing the Poverty Screening Questionnaire to your Ocean eForms Library; (2) creating a tablet rule to deliver the eForm to patients; (3) importing the Poverty: A Clinical Tool for PCPs custom form in your Telus PSS; and (4) installing a Telus PSS custom reminder to follow-up with patient related to their poverty screening results, if desired.

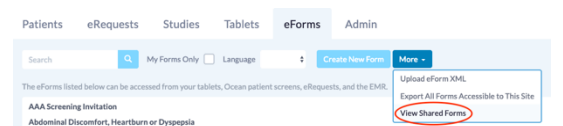
### Step 1: Importing an eForm in Ocean

To import the eForm complete the following steps:

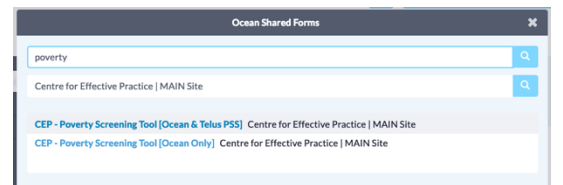
1. Log into your Ocean account. Click on the "eForms" tab.



2. Click on the "More" button. Select "View Shared Forms".



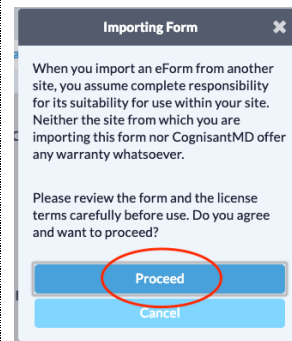
3. Enter "Poverty" in the search bar. And "Centre for Effective Practice" in the search by Site bar.



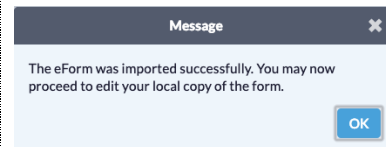
4. Click on the Form "CEP - Poverty Screening Tool [Ocean & Telus PSS]". Select "Import".



5. Select "Proceed" to confirm import.



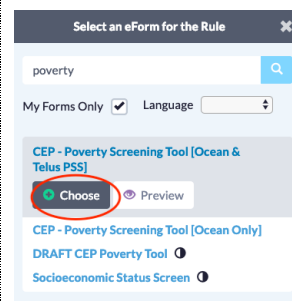
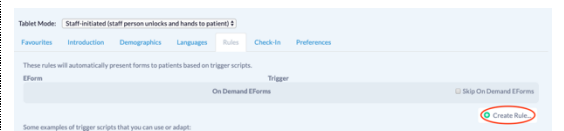
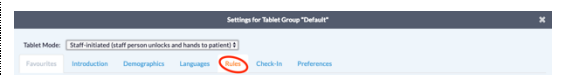
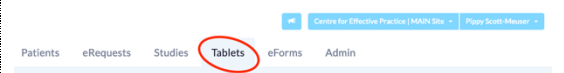
6. Click "OK" to. You have successfully imported the Poverty Screening Questionnaire to your Ocean site's eForm Library. If your site intends to screen all patients for Poverty, complete the steps outlined below to create a tablet rule in Ocean before importing the custom for in your Telus PSS custom forms library.



## Step 2: Creating a Tablet Rule in Ocean

To create a tablet rule complete the following steps:

1. Log into your Ocean account. Click on the "Tablets" tab.
2. Click on "Edit" for the tablet group that you want to add the rule to. In the pop-up window, select "Rules".
3. Select "Create Rule".
4. From the list of eForms that pops up, filter by "My Forms Only", select and choose "CEP - Poverty Screening Tool [Ocean & Telus PSS]".



5. Set the rule that needs to be satisfied for the eForm to be delivered to the patient. We recommend the following rule:

- firstTime || daysSinceLastCompleted > 365

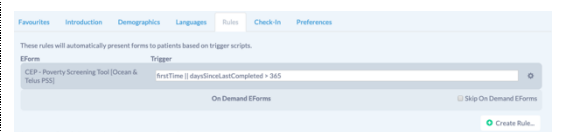
6. Click "Save".

Now that you've created the rule the form will be delivered to all patients that meet the following criteria:

- Patients that have NEVER filled out the questionnaire;

OR

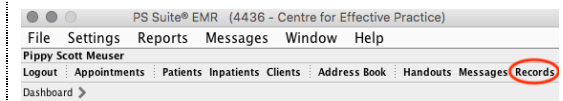
- Patients how last completed the questionnaire over 365 days ago.



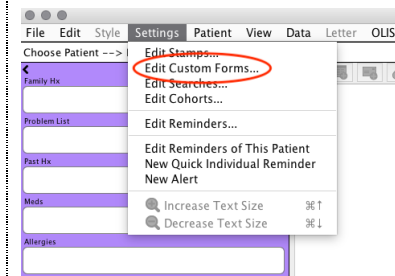
## Step 3: Importing a Custom Form in Telus PSS

To import the custom form complete the following steps:

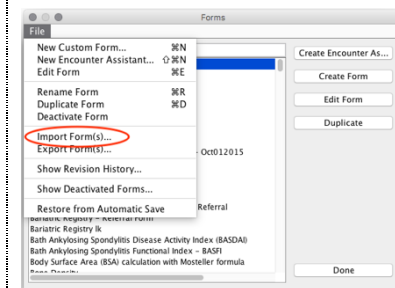
1. Open Telus PSS and select "Records" on the main dashboard.



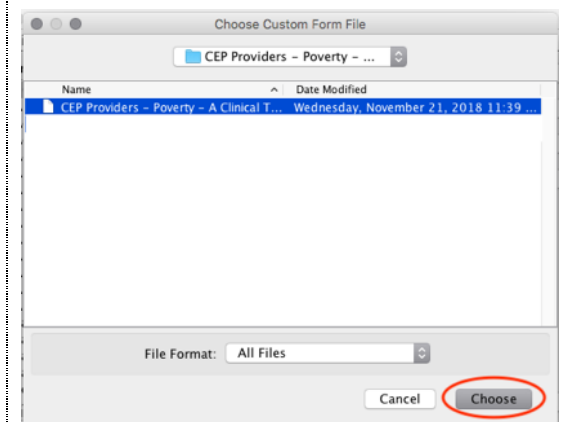
2. In the Records window, select "Settings" → "Edit Custom Forms".



3. Select "File" → "Import Form(s)".

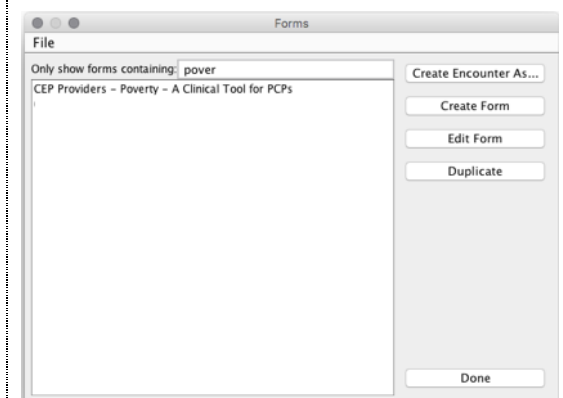


4. Locate the downloaded CEP Providers - Poverty - A Clinical Tool for PCPs – Ocean & Telus PSS Package folder, select the .cfm file and click "Choose".



5. Double-check that the forms have successfully imported by entering "Poverty" in the Forms library search bar. You should see the following form:

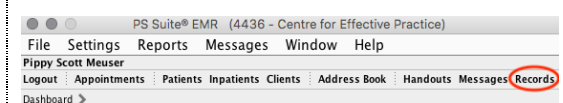
- CEP Providers – Poverty – A Clinical Tool for PCPs



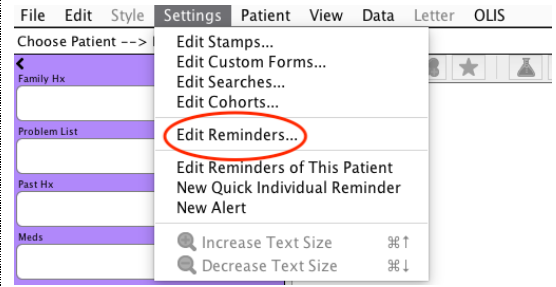
## Step 4: Importing a Custom Reminder in Telus PSS

To import the custom reminder complete the following steps:

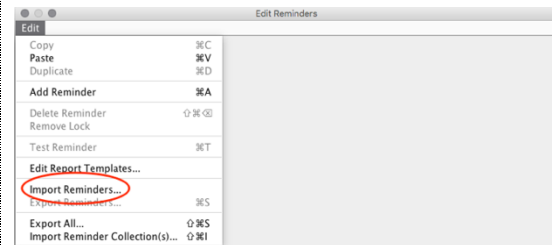
1. Open Telus PSS and select "Records" on the main dashboard.



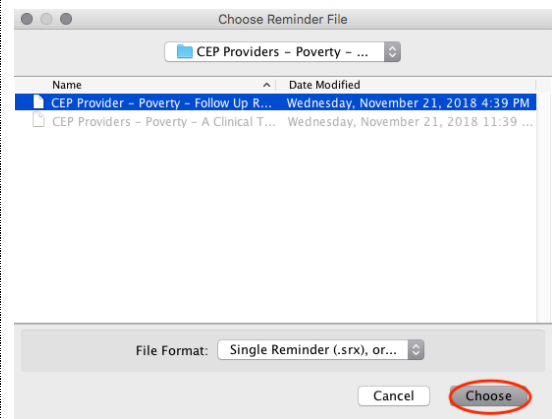
2. In the Records window, select "Settings" → "Edit Reminders".



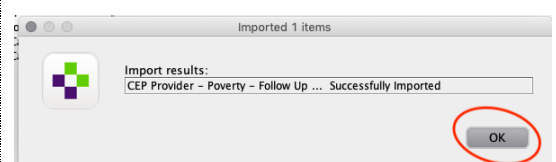
3. Select "Edit" → "Import Reminders".



4. Locate the downloaded CEP Providers - Poverty - A Clinical Tool for PCPs - Ocean & Telus PSS Package folder, select the .srx file and click "Choose".

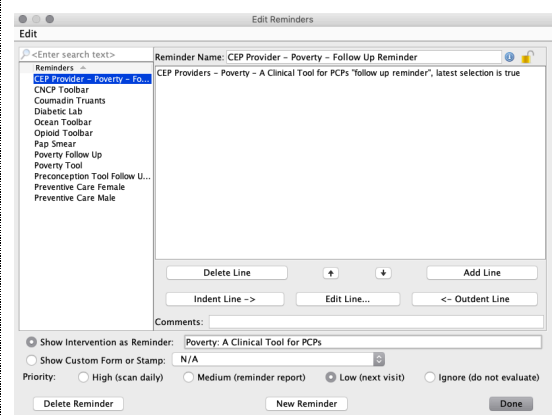


5. The reminder will automatically import. Click "OK".



6. Double-check that the reminder has successfully imported. You should see the following custom reminder in the side bar:

- CEP Provider - Poverty - Follow Up Reminder



## Set-Up Complete

You have successfully imported and configured the Ocean eForm and Telus PSS custom form and reminder your practice needs to use the Poverty: A Clinical Tool for PCPs toolkit. Now, your practice can seamlessly screen patients for poverty, and when necessary, intervene and provide patients with appropriate advice, resources, and services.