

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

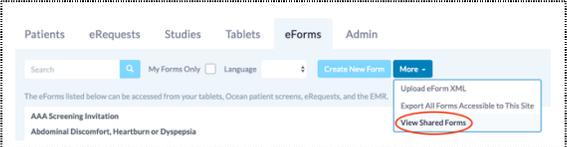
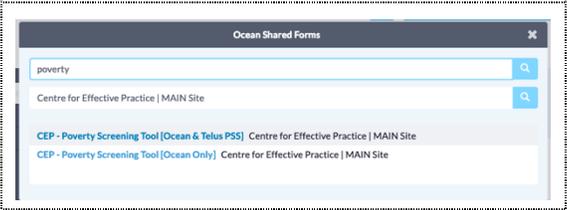
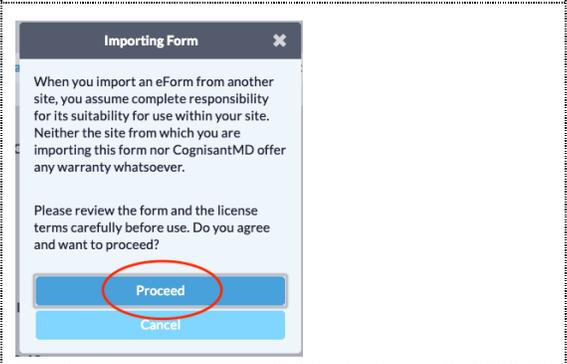
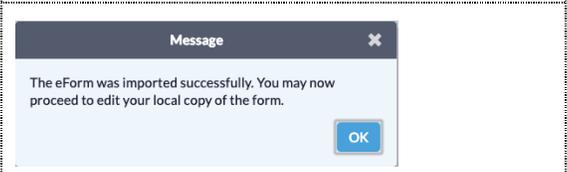
### About the Ocean Integrated Toolkit

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

The following instructions will help guide you through importing the Poverty Screening Tool eForm to your Ocean eForms Library.

### Step 1: Importing an eForm in Ocean

To import the eForm complete the following steps:

<p>1. Log into your Ocean account. Click on the "eForms" tab.</p>	
<p>2. Click on the "More" button. Select "View Shared Forms".</p>	
<p>3. Enter "Poverty" in the search bar. And "Centre for Effective Practice" in the search by Site bar.</p>	
<p>4. Click on the Form "CEP - Poverty Screening Tool [Ocean Only]". Select "Import".</p>	
<p>5. Select "Proceed" to confirm import.</p>	
<p>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.</p>	

### Step 2: Creating a Tablet Rule in Ocean

To create a tablet rule complete the following steps:

<p>1. Log into your Ocean account. Click on the "Tablets" tab.</p>	
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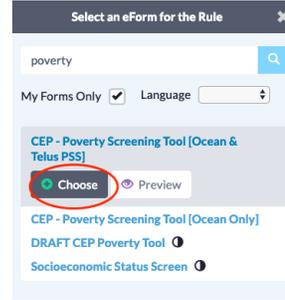
- Click on "Edit" for the tablet group that you want to add the rule to. In the pop-up window, select "Rules".



- Select "Create Rule".

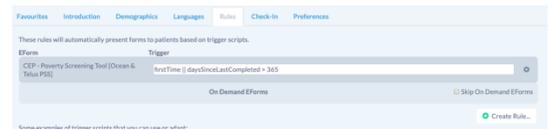


- From the list of eForms that pops up, filter by "My Forms Only", select and choose "CEP - Poverty Screening Tool [Ocean Only]".



- 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`



- 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.

## Set-Up Complete

You have successfully imported and configured all the custom forms 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.