

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

### About the Telus PSS EMR-Integrated Toolkit

The Centre for Effective Practice's Poverty: A Clinical Tool for PCPs custom-built Telus PSS toolkit provides Primary Care Providers the tools to deliver all patients with the 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 Telus PSS toolkit includes the following files:

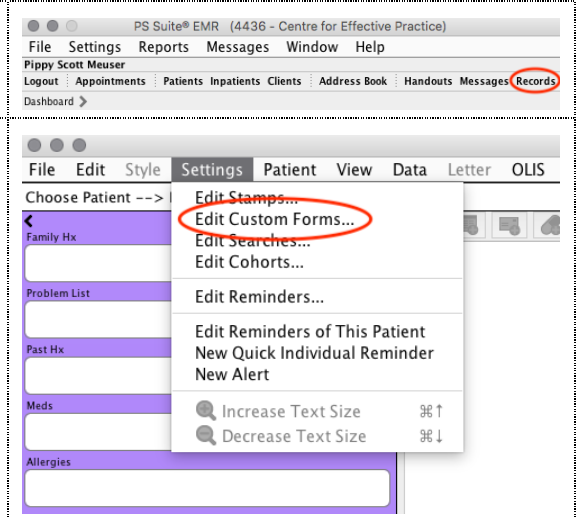
- CEP Providers - Poverty - Screening Questionnaire.cfm
- CEP Providers - Poverty - A Clinical Tool for PCPs.cfm
- CEP Provider - Poverty - Follow Up Reminder.srx

The following instructions will help guide you through: (1) importing the Poverty: A Clinical Tool for PCPs Screening Questionnaire and Recommendations; and (2) installing a custom reminder to follow-up with patient related to their poverty screening results, if desired.

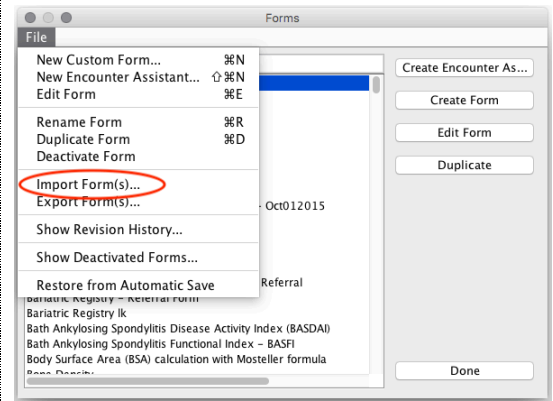
### Step 1: Importing Custom Forms in Telus PSS

To import the custom forms complete the following steps:

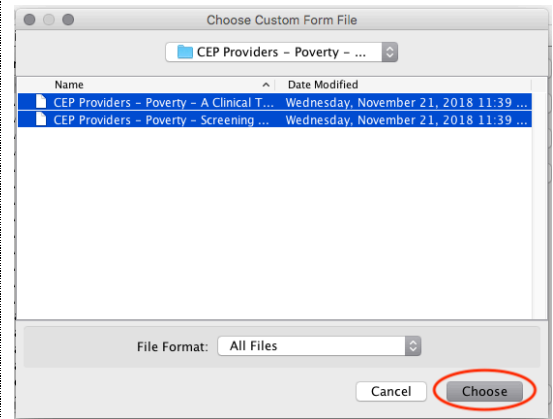
1. Open Telus PSS and select "Records" on the main dashboard.
2. In the Records window, select "Settings" → "Edit Custom Forms".



3. Select "File" → "Import Form(s)".

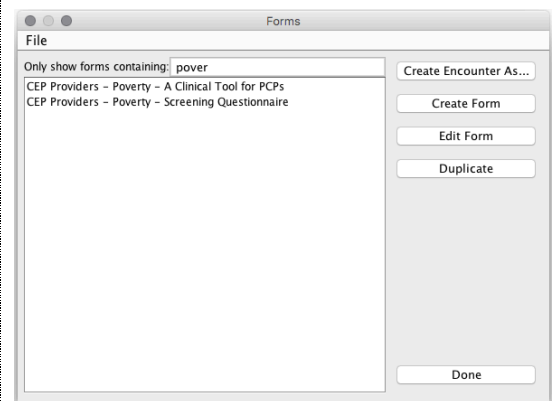


4. Locate the downloaded CEP Providers - Poverty - A Clinical Tool for PCPs - Telus PSS Package folder, select the two .cfm files and click "Choose".

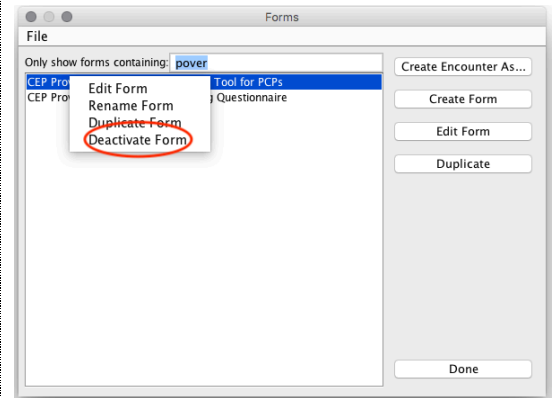


5. Double-check that the forms have successfully imported by entering "Poverty" in the Forms library search bar. You should see the following two forms:

- CEP Providers - Poverty - A Clinical Tool for PCPs
- CEP Providers - Poverty - Screening Questionnaire



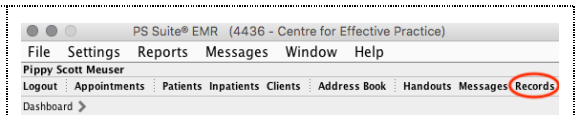
6. Lastly, "Deactivate" the "CEP Providers - Poverty - A Clinical Tool for PCPs" form. Deactivating the Form removes it from appearing in the Custom Forms library search and ensures that there is no confusion around which form should be used to screen and generate the recommendations.



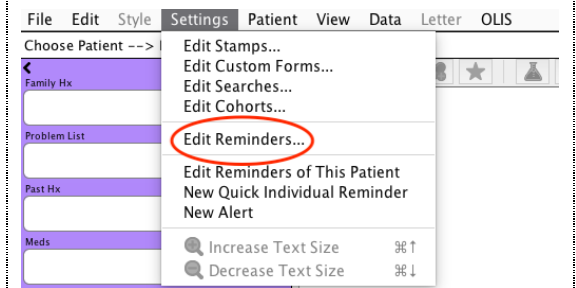
## Step 2: Importing a Custom Reminder in Telus PSS

To import the custom reminder complete the following steps:

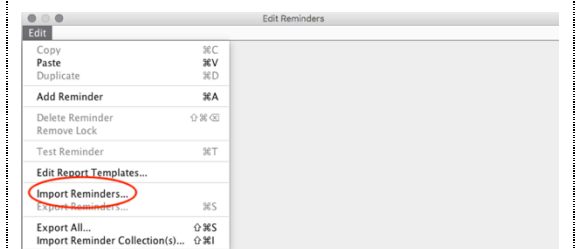
1. Open Telus PSS and select "Records" on the main dashboard.



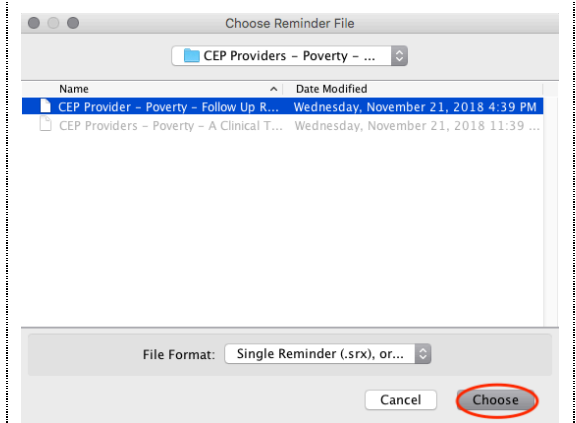
2. In the Records window, select "Settings" → "Edit Reminders".



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



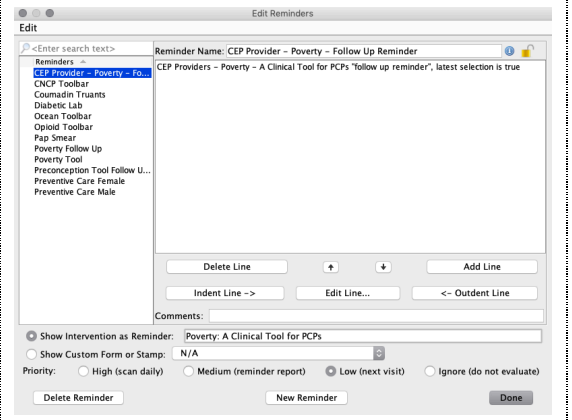
4. Locate the downloaded CEP Providers - Poverty - A Clinical Tool for PCPs -Telus PSS Package folder, select the .srx file and click "Choose".



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



7. 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 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.