



Using Wolf EMR for Screening and Prevention



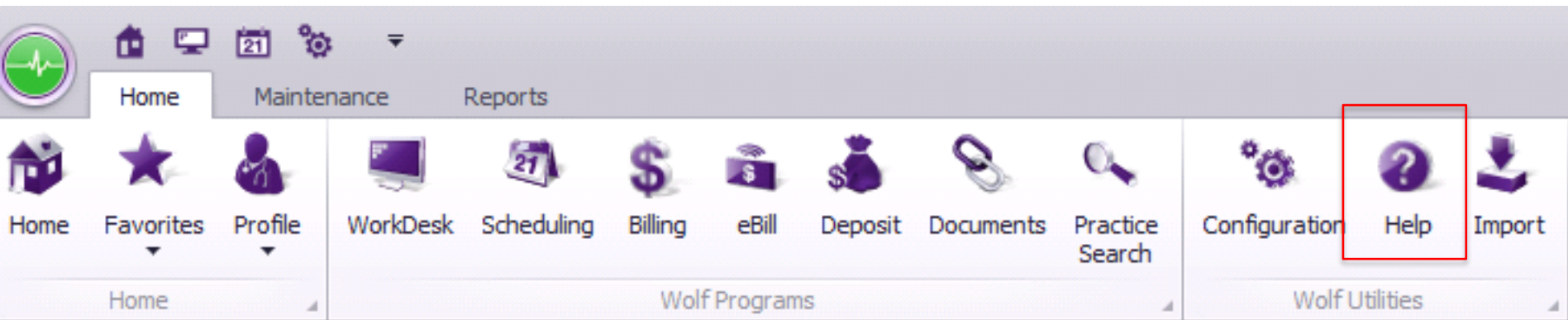
Improvement Facilitator Webinar
April 4, 2014

Outline

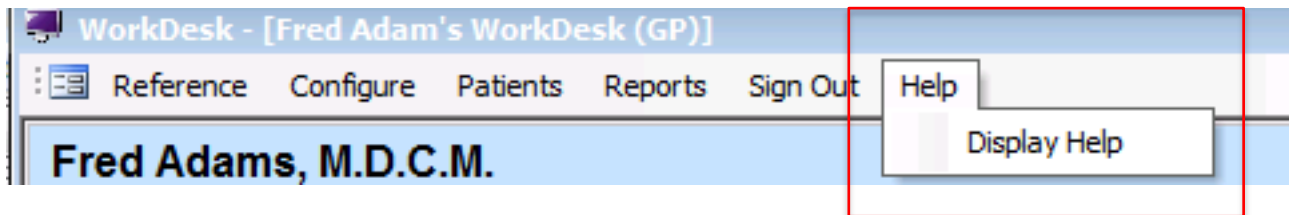
- Helping users help themselves
- Tips from Lakeland PCN
 - Short Cut keys
 - Summarized visits
 - Keywords for Documents
 - Verifying data at check-in
 - Entering Tobacco
 - CV Risk – recording
- Panel Identification
 - Creating Status
 - Practice Search
 - Bulk Add-In
- Practice Search
 - Process Measures
 - Search and Rule
- Vaccination Code Maintenance
- Lab Code Maintenance

Helping Users Help Themselves

From the Wolf Home Screen



From the Physician Workdesk, Front Workdesk or Scheduler



Help:

Search, print and link to video tutorials

Contents Index Search Glossary Print Expand/Collapse

Type your search text here:

Home > Practice Search > Practice Search Rules > Practice Search Rule:

in the word(s) to search for - Enclose
le words in quotes

Practice Search Rules

highlight search results

ch results per page 10

Pre-Defined Practice Search Rules

[Practice Search Rules](#)

Practice Search

and Practice Search

Rules

and Billing

ion History

ic Disease Management

Practice Search Parameters

Chart Reports

2 3 4 >>

Practice Search Rules

Wolf EMR comes with a large set of [Pre-Defined Rules for Practice Search](#). These rules are used to manage a set of patients and govern the way that Practice Search works for a variety of conditions including CDM and Care Plan patients. Unlike Practice Search Lists, Rules are searches which automatically trigger reminders and notifications for physicians and front office staff if a patient matches any rule criteria. For example, an active rule may indicate that a patient needs a follow-up scheduled, or a patient's billing is incomplete.

- How to Use the Pre-Defined Rules
- How to Create a Rule
- How to Generate the Rule Engine
- Where Can I View Rule Matches
- Rule Matches Screen Functionality
- How to Filter within the Rule Matches Screen
- What Actions Can I Take with Rule Matches
- How to View the Rule Engine Status
- Rule Match Buttons

Wolf EMR Technical Assistance Centre: WolfEMR.support@TELUS.COM or visit the [new Wolf EMR Community Portal](#), which is replacing the [Wolf Customer Care Portal](#).
(For the customer care portal, use the username and password you received during Implementation.)

Video tutorial
Training information

Community Portal

Every Wolf user has access to the Community Portal Resources

- * Add IDEAS (and vote on ideas)
- * Q & A
- * Knowledge
- * Cases

The screenshot shows the TELUS HEALTH Community Portal interface. At the top, there is a navigation bar with 'Home', 'Q&A', 'Ideas', 'Knowledge', and 'Cases'. The main content area is divided into several sections:

- My Account:** Welcome Barbra McCaffrey, Toward Optimized Practice, Logout.
- Recent Items:** A list of recent items including 'Video - Custom Exam Fields', 'Custom Exam (Sub form) with Smart Tags to pull in patient data', 'Height on Adult Chart', 'Exercise status', 'Add to Preventive Care', 'PITO Funding Letter', 'Release notes for Wolf EMR release 2013.3 patch 6', 'Video - How to save favourite medications', 'Wolf EMR Conference 2013 - Product Roadmap', and 'Add colonoscopy, FIT and BMD to the preventative care drop-down list'.
- Other Resources:** A list of links including TELUS Health, TELUS Corp., AB - PCOSP, Alberta Health, Alberta Health Services, BC - PITO, BC Ministry of Health, Saskatchewan Health, New Brunswick Health, and Wolf EMR Learning Centre.
- Articles:** A list of articles including 'Self Service Reset Password', 'PITO Funding Letter', 'Transcription Services', 'Release notes for Wolf EMR release 2013.3, including Patches 1-7', 'Release notes for 2013.3 Patch 7', 'How to Use the Wolf EMR Community Portal', and 'Wolf EMR Conference 2013 - Product Roadmap'.

A diagram titled 'What can you do with the Community Portal?' is overlaid on the bottom half of the screenshot. It illustrates three main actions:

- 1. Stay informed and Educated:** By visiting our Knowledge Articles. This is linked to the 'Knowledge' section of the interface.
- 2. Find Answers:** to Frequently Asked Questions Or Post Questions for the community to answer. This is linked to the 'Q&A' section of the interface.
- 3. Have an idea? Let us know and then vote on your favourite:** This is linked to the 'Ideas' section of the interface.

The diagram also shows a search box with a 'Search' button and a 'Clear Search' button. The search results show a list of article types: FAQ, Learning Materials, Release Notes, System Requirements, and User Guides. The 'Ideas' section shows a flow: Post Ideas (lightbulb icon) → Vote for Ideas (checkmark icon) → Add Comments (comment bubble icon).

Tips from Lakeland PCN - Monica

- Short Cut Keys
 - F7: Open Medical Summary Screen
 - F9: Patient Maintenance Screen
 - F6: Vital Entry Screen
 - For Front Staff, this is also the quickest way to get to a Exam Sub-form for data entry

Appointment Reason:

Appointment Notes:

Marked as Completed

Vitals SOAP

BP Systolic:

BP Diastolic:

Pulse:

RespRate:

Temp:

Height:

Waist Circ:

Weight:

BMI:

Head Circ:

Acuity: OU

OD:

OS:

Glucometer:

Result:

Notes:

Urine RBC: WBC: Nitrite: Gluc: Protein:

Urine SG: Ketones: pH: Bili: Urobili:

Prog Test:

Antenatal Record

Structured Examinations

Dwayne, Brook F 43 22/04/2007

Dwayne, Celine F 37 22/04/2007

Dwayne, Dannie M 41 22/04/2007

Female GU

Fibromyalgia

G Prev Screening Female ©

General

Gynecology

Headache

• Quick Access to summarized Visit Records

1. Click on paper icon in patient SMART Banner to open summarized visit record.

TEST, MALE Born Sex **M** PHN **12345-6789**

Next Encounter: None Status N/A

Home address Home BMI Pri Droovnath Ramful, MBChB. M...

ELK POINT AB TOA 1A0 Cell Weight

Work BP

No Inv. No Docs No Rules No Messages 4 Follow Ups N/A no DOB specified

Print Chart Custom Report Request Chart Change Log NetCare

Current Hx Past Hx Personal Hx Communication Investigations Documents Referrals

Problems

<<Add New Problem>>

Encounters

28-May-2013	C	msg	FOBT refused
22-Oct-2012	C	msg	Please call to book appt with Dr. Schloss
04-Nov-2005	C	msg	I am trying for the first time.
02-Nov-2005	C	msg	This pt would like you to phone him regarding his x

Vaccinations

<<Add Vaccination>>
<<Vaccination Schedule>>

Primary Immunizations Completed

Blood Type:

Current Medications

<<Add New Medication>>
Ketoprofen (Apo-Keto-E ECT) 250 mg i PO BID

Allergies

<<Add New Allergy>>
penicillin VK

2. Summarized record for patient appears

Visit Records for: [REDACTED]

Medical Summary Quick Print [Print Icon] [Refresh Icon]

Filter:

From Date: Birth To Date: Today Service Provider: <All> Visit Type: <All> Impression: <All>

05-Jul-2012 02-Apr-2014 Speciality: <All> Assessment: <All>

Sort:

Date: Descending Service Provider: Ascending Visit Type: Ascending Impression: Ascending Assessment: Ascending

Date: 31-Jan-2014 Physician: [REDACTED] MBChB. MRCP Visit Type: General
Last Edited: 31-Jan-2014 Last Edited By: [REDACTED] MBChB. MRCP (Signed)

Chief Complaint Gastroenteritis
Subjective Fever, watery diarrhea
No blood in stools, no vomiting
Objective No dehydration
No jaundice
Abd: soft, no LKKS
Bowel sounds: normal
ENT: normal
Chest: clear
Diaper rash present

Plan Rx: Pedialyte for 12 hrs then light diet
Medications New: Clotrimazole topical (Canesten CREA) 1 g i TOP TID Quant: 60 g R x 0
Impression intestinal infections due to other organisms 008

Date: 04-Nov-2013 Physician: [REDACTED] MBChB. MRCP Visit Type: General
Last Edited: 04-Nov-2013 Last Edited By: [REDACTED] MBChB. MRCP (Signed)

Objective Skin ulcer and infection in the web behind L great toe and 2nd toe. I cleaned it with Betadine
Medications New: Cefuroxime (Ceftin 125 mg/5 mL PWDR) g i PO BID Quant: 75 mL R x 0
New: Mupirocin topical (Bactroban CREA) 2 g i TOP TID
Impression Other local infections skin & subcutaneous tissue 686

Date: 08-Oct-2013 Physician: [REDACTED] MBChB. MRCP Visit Type: General
Last Edited: 08-Oct-2013 Last Edited By: [REDACTED] MBChB. MRCP (Signed)

Subjective Rash upper back
Objective Eczema with oozing rash

Keywords and Documents

Use consistent keywords in the clinic – from a list of keywords.

When linking documents enter more than one keyword to describe the document

No Inv. No Docs No Rules No Messages No Follow Ups No Vaccinations

Print Chart Custom Report Request Chart Change Log NetCare

Current Hx Past Hx Personal Hx Communication Investigations Documents Referrals Obstetrics

Hide SMART Forms Document Type <ALL> Search: AND View Do

Date	Status	Document Type	Keyword One	Keyword Two	Keyword Three	Content Type	Notes
30-Jun-2013	Staff Revie		OPD				Marked as reviewed at lir
03-May-2013	Staff Revie		WCB letter				Marked as reviewed at lir
30-Apr-2013	Reviewed		Diagnostic Imagin				
19-Apr-2013	Staff Revie		Medications adap:				Marked as reviewed at lir
19-Mar-2013	Staff Revie		OPD				Marked as reviewed at lir
19-Mar-2013	Reviewed		X-Ray	R knee			
25-May-2012	Reviewed		Urine Culture				
25-May-2012	Reviewed		Urine Culture				
01-Mar-2012	Reviewed		Consult	Nothern Lung Fun			
11-Nov-2011	Reviewed		OPD				
16-Dec-2010	Reviewed		OPD				
22-Nov-2010	Reviewed		Diabetic Consult				
19-Sep-2010	Reviewed		OPD				
05-Jul-2010	Reviewed		Operation Report	Dr. Smith			
02-Jan-2010	Reviewed		OPD				
28-Jun-2009	Reviewed		OPD				
22-Aug-2008	Reviewed		Blood Culture				
22-Aug-2008	Reviewed		CBC				
09-Feb-2008	Reviewed		Out Patient Form				
25-Oct-2007	Reviewed		Out Patient Form				
11-Sep-2007	Reviewed		Medical letter				
04-Sep-2007	Reviewed		X-Ray	Chest			
16-May-2007	Reviewed		Consultation Repr	Dr. Ndovi			

Attach these Keywords

Document Type

Link to This Appt

Link to this Consultation

Document Date and Note

Link to Service Provider

Link Only

Link and Reviewed

Entering Smoking Status

- Enter in Personal Hx tab

The screenshot displays a medical summary for a patient named Andrea Burfoot. The interface includes a header with patient information, a navigation bar with tabs for different medical history sections, and several content panels. The 'Personal Hx' tab is selected and highlighted with a red box. Within this tab, the 'Harmful Substances' section is also highlighted with a red box. This section contains two dropdown menus: the first is set to '?? Not Known ??' and the second is set to 'Light: < 6 Drinks/Week'. Below these are labels for 'PackYrs Smoked' and 'T-ACE Score: 0'. A tooltip 'Click to Edit Smoking/Acohol' is visible next to the 'PackYrs Smoked' label. Other sections visible include 'Social History' (Marital Status: Married, Income: Other, Education Level: Trade School), 'Family History' (listing Breast Cancer, Colon Cancer, Coronary Atherosclerotic Heart Disease, and Depression), and 'Other Risks'.

Medical Summary

Burfoot, Andrea Born 12-Jan-1927 (87) Sex F PHN 9996 608 259
Next Encounter: None Status N/A

Home address: 5415 90th St., Calgary AB T5D 2Y5
Home Cell Work
BMI Weight
BP 210/95 7 yr
Pri Fred Adams, M.D.C.M.

No Inv. No Docs 2 Rules No Messages No Follow Ups No Vaccinations

Print Chart Custom Report Request Chart Change Log

Current Hx Past Hx **Personal Hx** Communication Investigations Documents Referrals Obstetrics

Social History

Marital Status: **Married**
Significant Other:
Income: **Other**
Occupation:
Education Level: **Trade School**

Family History

 ...View Family Tree
<<Add New Family History>>
Breast Cancer Daughter
Colon Cancer Daughter
Coronary Atherosclerotic Heart Disease Nephew
Depression Nephew

Harmful Substances

?? Not Known ??
"PackYrs Smoked": Click to Edit Smoking/Acohol
Light: < 6 Drinks/Week
T-ACE Score: 0

Other Risks

<<Add New Risk>>

Personal Risks

Burfoot, Andrea PHN 9996 608 259

Born 12-Jan-1927 (87) Sex F Status N/A

5415 90th St., H
 Calgary AB T5D 2Y5 C
 W Pri Fred Adams, M.D.C.M.

Smoking

?? Not Known ??

Year Of Onset:

Pack(s)/Day:

Date Quit:

"PackYrs Smoked":

Target Date:

Click to indicate that you verified status
Never checked

Alcohol

Light: < 6 Drinks/Week

Tolerance:

Annoyance:

Cut Down:

Eye Opener:

T-ACE Score:

Click to indicate that you verified status
Never checked

Other Risks

Patient

Screen

1. Enter Smoking from Personal Hx to change SMART banner

2. OR enter smoking from Quick Entry Form (Rt. mouse click) to change SMART banner

Quick Entry Form

Enter Medical History For: Amber, Steve

Patient: **Amber, Steve** Clinic MD: **Fred Adams, M.D.C.M.**

Social Problems Medications Allergies Procedures & Surgeries

Marital Status:

Significant Other:

Occupation:

Income Type:

Education:

Smoking: Notes:

Alcohol:

+ Enter Sm

+ Enter Far

ce History

Verifying Patient Data at Check-in

Barrett, Sue

Lab Results Documents PHCO
Appointments Billing <Not Used:
** Patient Search ** Name/Addr/Phone Other Demograph

Name
*Family: Barrett
Given: Sue
Middle:
Chosen:
Title:

Address
 Primary Address
Line 1: 9995 Seymour Road
Line 2:
City: Calgary
Prov: Alberta
Country: Canada Type:
Postal: T3T 508
From: 01/Jan/2000
Up To:

Communication
Home:
Work:
Cell:
Fax:

Primary Service Provider: Adams, Fred
Alternate Service Provider: <Not Applicable>
Care Team: <Not Applicable>
Billing Prov: British Columbia
PHN: 9996849871 01/Jan/1997
Birthdate: 12/Feb/1993
Age: 21 Year
Chart: 3932
Other ID:
Infant / Dependant *Gender
 Female
 Male

Main Pharmacy: Canadian Superstore Surrey
Default Location: Greenleaf Medical

Referred By
Consultant On File
Search By (Name or MSP#)
Consultant Physician Use in Billing as Default
Consultant Not on File
Name:
Phone:
Family Practice Referral
Search By (Name or MSP#)
Family Practice Phys Use in Billing as Default
Referral Expiry Date: Referral Notification Date:

Relationship

Related To Patient	Relationship

Custody Agreement
Notes:
Clinic-Defined Forms

Login Name:
Password:

Patient Data Verification
 Patient Data Verified
Last recording: 03/Apr/2014

Alberta Wellnet
AB EHR ULI:

Charting CV Risk Score

Chart the resulting score in SOAP note or it will not be documented.

The screenshot displays a medical charting interface with the following elements:

- Buttons:** "Close Exam", "Draw Picture", "Apply Defa".
- Physical Exam Fields:** Height, Weight, Waist Circ, BMI, Length Units (cm/in), Weight Units (kg/lb), Smoking Status (Non S), Alcohol Use (?? No).
- Vitals:** Target.
- Cardiac Exam:** Murmur, Grade, Peripheral Edema.
- Other Fields:** Homocysteine, Fasting BS, Chest, Last Cardiology Consult.
- Callout Box:** A white box with a blue border and a pointer to the "Framingham Score" field, containing the text: "Framingham Score is a searchable field".
- CVS Notes:** A large text area for notes.
- Cardiac Risk Summary:** "Cardiac Risk", "Missing Cholesterol Profile", "Average 16.0% risk of CVD in n".

CV Risk Worksheet

1. Complete Worksheet
2. Print
3. Automatically saves as document with keyword “Cardiovascular Risk Profile” in Documents of the patient
4. Is a record of the offer and a Practice Search and Rule can identify patients without this Document



Non Modifiable Risk Factors

Current Heart Age

Optimized Heart Age

Age: **41**
 Gender: **Female**
 Diabetes: **DM Positive**

>80**36**

Modifiable Risk Factors

Smoking Status	<input type="text" value="Smoker"/>
Systolic BP	<input type="text" value="120"/>
Taking Anti-hypertensives	<input type="checkbox"/>
Total Cholesterol	<input type="text" value="6.5"/>
HDL Cholesterol	<input type="text" value="0.9"/>

Modify the patient's risk factors to see how these changes can ultimately lower their Cardiac risk. This information will not be saved in the patient's record and is used purely for educational purposes.

Risk Based On Selected Variables	15.9% risk of CVD in next 10 years	
Current Cardiac Risk	10.0% risk of CVD in next 10 years	
Average Cardiac Risk	2.0% risk of CVD in next 10 years	
Optimized Lipids	3.3% risk of CVD in next 10 years	
Optimized Blood Pressure	6.3% risk of CVD in next 10 years	
Stop Smoking	10.0% risk of CVD in next 10 years	
All Variables Optimized	2.0% risk of CVD in next 10 years	

Other Risk Factors

CVD Already Present	<input type="text" value="Yes"/>
Family History (CVD < 60 yrs)	<input type="text" value="No"/>
BMI	<input type="text" value="N/A"/>
Weight	<input type="text" value="N/A"/>
Ideal Weight (BMI 19-25)	<input type="text" value="N/A"/>

Target Lipid Values

	LDL-C level	Total-C /HDL-C ratio	TG
Patient's Latest Values:	<input type="text" value="4.5"/>	<input type="text" value="N/A"/>	<input type="text" value="2.3"/>
Target:	<input type="text" value="< 2"/>	<input type="text" value="< 4"/>	
Recommendation:	Start medication and lifestyle changes concomitantly if values are above target values.		

Recommendations adapted from:
 Canadian Cardiovascular Society position statement
 Can J Cardiol Vol 25 No 10 October 2009

[Click Here to View Complete Article](#)

[Report of the Working Group on Hypercholesterolemia and Other Dyslipidemias CMAJ 2003;169\(9\)](#)

[Click to View Framingham Cardiac Risk Reference Article](#)

1. Complete the worksheet.
2. Click print.

3. CV Risk Profile document is created for the patient.

| **Cardiovascular Risk Profile**

April 3, 2014

Prepared for: **Elaine Anderson**

Prepared by: Fred Adams, M.D.C.M.

Risk Analysis for Developing Cardiovascular Disease (CVD)

You have a 10.0% risk of CVD in next 10 years.

Your cardiovascular risk profile is an *individualized assessment* of your current risk. The computer has estimated your risk of developing cardiovascular disease over the next ten years and compared it to the current risk among individuals of your age and gender. These calculations are based on the best available data and give a prediction of what "on average" will happen to individuals like you.

For example if your 10-year cardiac risk is presented as 15% and 100 individuals matching your profile were observed over the next ten years 15 of 100 individuals would be expected to develop cardiovascular disease. While the computer cannot predict whether you will be one of the 15 individuals who develop disease or one of the 85 who do not, it is clear that the lower your risk the better.

4. Document is in the patient record with the keyword, Cardiovascular Risk Profile attached to it.

Anderson, Mrs. Elaine Born 15-Jul-1972 (41) Sex F PHN 9991 016 267
Arrived 0 mins Status N/A

Home address 1005 Wolfpack St., Donaldson AB T8S 2K6 Home (403) 111-1005 Cell (403) 222-1005 Work (403) 222-1005
BMI Weight 70.0 kg Height 1.65 m Pri Fred Adams, M.D.C.M.

No Inv. No Docs 5 Rules No Messages 3 Follow Ups No Vaccinations

Print Chart Custom Report Request Chart Change Log

Current Hx Past Hx Personal Hx Communication Investigations Documents Referrals Obstetrics

Hide SMART Forms Document Type <ALL> Search: AND View Document Properties

Date	Status	Document Type	Keyword One	Keyword Two	Keyword Three	Content Type	Notes	MD	Review Date
03-Apr-2014			Cardiovascular Ri:						
02-Dec-2010	Reviewed		Consult Letter Co	WOLF.COMPOSER.					02-Dec-2010
02-Dec-2010	Reviewed		Consult Letter Co	WOLF.COMPOSER.					02-Dec-2010
29-Sep-2010	Reviewed		Consult Letter Co	WOLF.COMPOSER.					29-Sep-2010
28-Sep-2010	Reviewed		Consult Letter Co	WOLF.COMPOSER.					28-Sep-2010
28-Sep-2010	Reviewed					Breast			28-Sep-2010

Practice Search

- Powerful tool
- Support buy-in (individually with MD)
 - “Let’s see how many patients that are attached to you and had 2 visits last year had a blood pressure taken...”
 - “Let’s see how many of your patients, that have had 4 or more visits in the last 5 years have no height in their record...”
- Process Measures
- Maneuver searches – turn into Rules
- Rules enable both opportunistic and outreach screening

File



Fred Adams, M.D.C.M.

Search All Patients



Generate Rule

- Medications (by ATC Classification)
- Medications (Legacy)
- Medications (by ATC Classification or Type)
- Medications (by ATC Classification or Family)
- Prescriptions (by ATC Classification)
- Prescriptions (Legacy)
- Prescriptions (by ATC Classification or Type)
- Prescriptions (by ATC Classification or Famil
- Prescriptions (Any)
- Vaccinations
- Vaccinations (by CDM code)
- Vaccinations, Refused
- Surgery
- Lab Results (Any)
- Lab Results (Most Recent)
- Lab Results (Received)
- Lab Result or Document
- Family History
- Referral (Consultant)
- Referral (Specialty)
- Primary Immunization
- PAPS
- Mammograms
- Messages
- Documents
- Visits
 - Impression
 - SOAP
- Symptoms
- Exam Findings
 - Exam Finding Values
 - Exam Finding Values (Most Recent)
 - Systolic BP
 - Diastolic BP
 - Beck Score
 - Mini Mental Status Score
 - Height
 - Weight
- Billing

Prev Screen CV Risk Worksheet Due Female 50 +

Ignore Data Restriction Reason

Notes

Patient Demographics

Show Patients Where: Exclude Matches

Age is and

Date of Birth

Gender Is

Not Deceased

Active Patients Only

History

Show patients with documents where Exclude Matches

Keywords

Date Filed

Practice Search to look for:
 women 50 – 74
without a CV Risk Profile Document filed in the last three years.

