

Creating custom forms and updating your forms to incorporate new data elements

Oregon EMS & Trauma Systems Program provides Oregon-specific EMS ePCR forms for direct users of the state ImageTrend Elite system. These forms contain all the collected data elements in the Oregon state data set, and come in three versions: EMS-Oregon, EMS-Oregon+, and EMS-Oregon Non-transport. Oregon EMS & Trauma Systems Program maintains these forms and keeps them compliant with the latest version of the NEMSIS data standard. Some agencies prefer to make changes to these forms to add additional fields or remove others that their crews do not use.

Customizing your forms is easier than you think, but before you begin, a word of warning! If you create a custom form your agency is responsible for maintaining that form. Even if you start with a copy of the state form there is no ‘link’ between the state form and your custom form. When changes to the state data set are made that add required elements, or a new version of the data standard is released you will need to create a new custom form that incorporates the changes.

If your agency wants to create a custom form, we recommend starting by reviewing the state ePCR form and identify the specific changes that you want to make:

- What elements do you want to remove?
- What elements would you like to add, and where would you like them to appear in the form?
- What elements would you like to move, and where would you like to move them to?

The screenshot displays the 'Incident Location' section of an ePCR form. The interface includes a top navigation bar with 'Save', 'Print', 'PDF', 'EMG', 'Transfers', 'Messages', and 'Close' buttons. A left sidebar contains a menu with categories like 'Dispatch and Response', 'Scene', 'Activities', 'Narrative', 'Transport/Transfer', and 'Billing'. The main form area is titled 'Incident Location' and contains the following fields and options:

- Incident Location Type:** A dropdown menu.
- Incident Facility:** A selection area with buttons for 'Adventist Health Medical Group - Urgent Care Parkrose', 'Legacy Emanuel Medical Center', 'Legacy Good Samaritan Medical Center', 'NEMSIS 3.5 SNF', and 'PDX Detox'.
- Incident Facility or Location Name:** A text input field.
- Incident Street Address:** A text input field with a clear button.
- Incident Street Address 2:** A text input field.
- Incident Apartment, Suite, or Room:** A text input field with a clear button.
- Incident ZIP Code:** A text input field with a clear button.
- Incident Address Location Lookup:** A button.
- Incident Address Postal Code Lookup:** A button.
- Incident City:** A text input field with a clear button.
- Incident County:** A text input field with a clear button.
- Incident State:** A text input field with a clear button.
- Incident Country:** A text input field.

At the bottom of the form, there is a status bar showing 'No Patient Name Entered', 'Incident Number Demo-20230119-1711', a '76 Validation' indicator, a 'Menu' icon, and a 'Status: In Progress' dropdown menu.

Review any proposed changes with your team to make sure that they will not impact any existing work processes. Make sure that you are not removing required elements that will trigger validation rule errors or warnings. If you are not sure whether a data element is required, you can look at the state data set here: https://www.nemsis.org/media/nemsis_states/oregon/Resources/OR_StateDataSet.xml#Elements. Click into an element from the list to view details. Look at ‘Usage’ to determine if a data element is required or not. Scroll down to the bottom of the page to see all ‘Associated Validation Rules.’

State Collected Elements

The data elements that the state collects or requires.

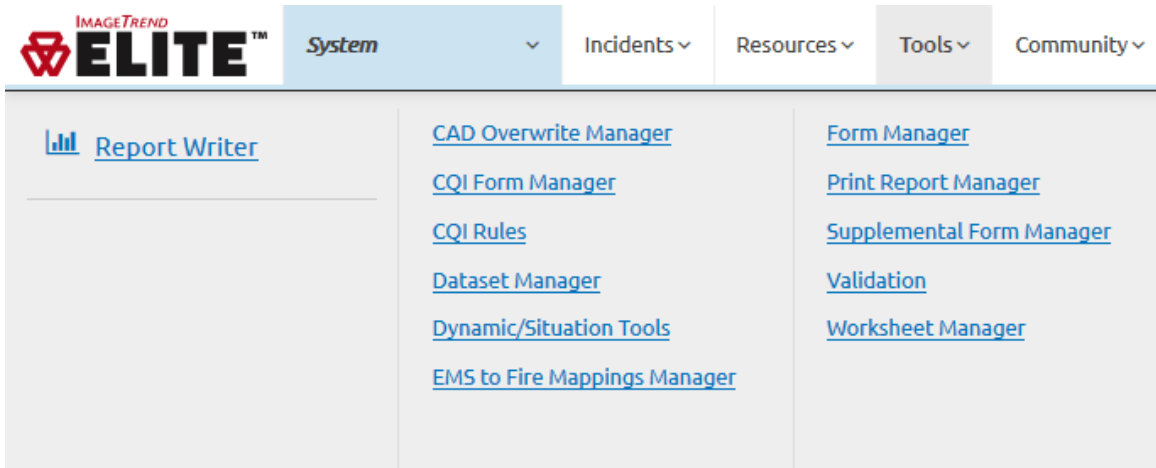
- DEMDataSet EMSDataSet
 Show Non-state-required Data Elements

N	S	Element Number	Element Name
N	S	eRecord.01	Patient Care Report Number
N	S	eRecord.02	Software Creator
N	S	eRecord.03	Software Name
N	S	eRecord.04	Software Version
N	S	eResponse.01	EMS Agency Number
N	S	eResponse.03	Incident Number
N	S	eResponse.04	EMS Response Number
N	S	eResponse.05	Type of Service Requested
N	S	eResponse.07	Unit Transport and Equipment Capability
N	S	eResponse.08	Type of Dispatch Delay
N	S	eResponse.09	Type of Response Delay
N	S	eResponse.10	Type of Scene Delay
N	S	eResponse.11	Type of Transport Delay
N	S	eResponse.12	Type of Turn-Around Delay
N	S	eResponse.13	EMS Vehicle (Unit) Number
N	S	eResponse.14	EMS Unit Call Sign
	S	eResponse.20	On-Scene Odometer Reading of Responding Vehicle
	S	eResponse.21	Patient Destination Odometer Reading of Responding Vehicle
N	S	eResponse.23	Response Mode to Scene
N	S	eResponse.24	Additional Response Mode Descriptors
N	S	eDispatch.01	Dispatch Reason
N	S	eDispatch.02	EMD Performed
	S	eCrew.01	Crew Member ID
	S	eCrew.02	Crew Member Level
	S	eCrew.03	Crew Member Response Role

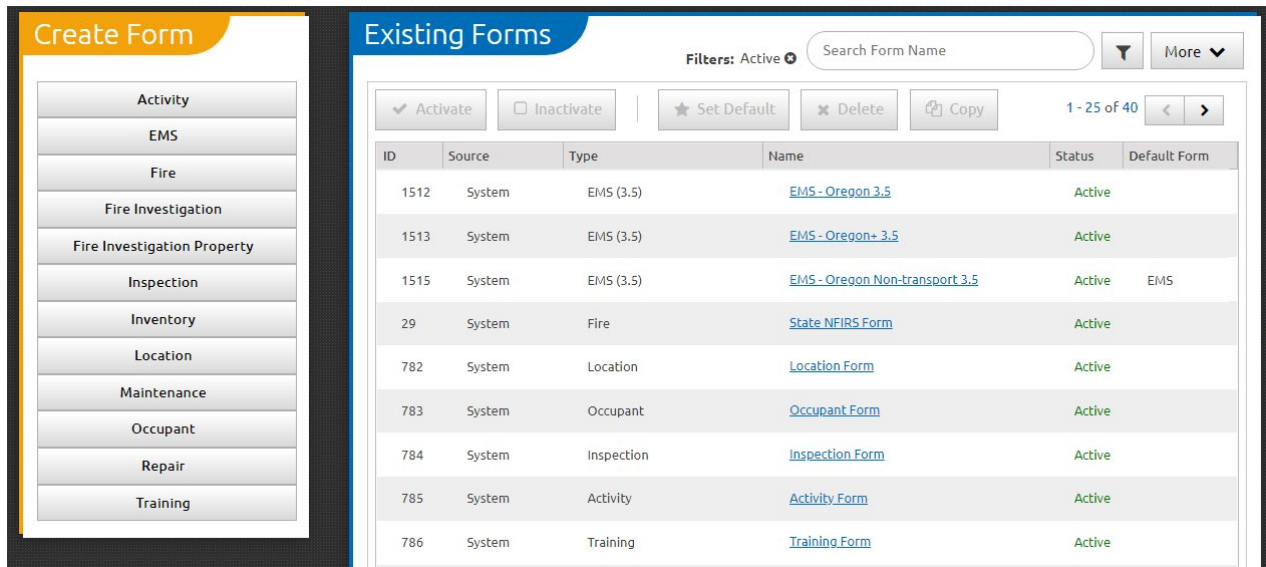
Managing your agency's forms

In the pull-down menus in the upper left-hand corner select:

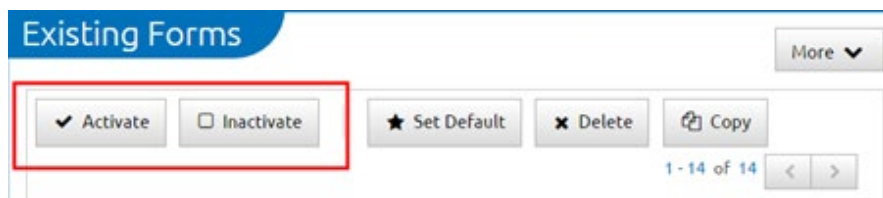
Tools > Form Manager



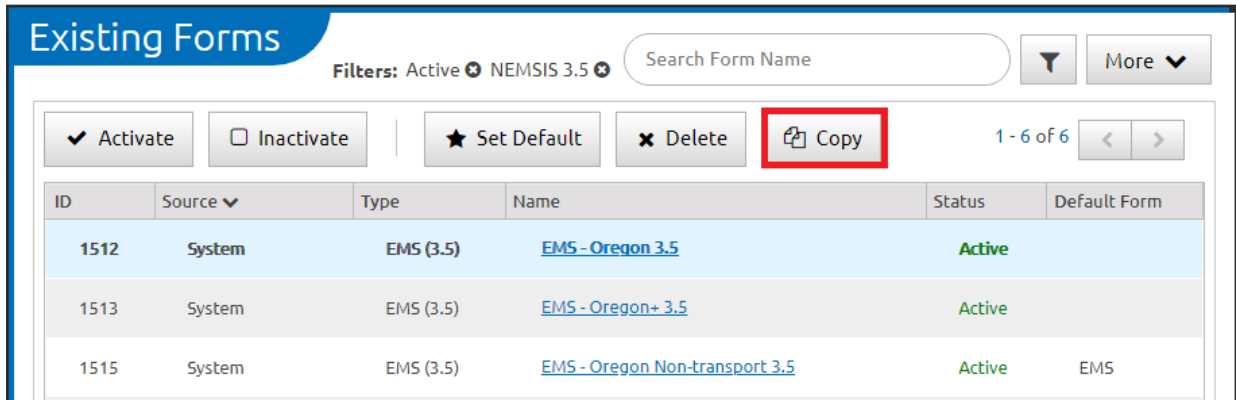
Select an existing EMS Form:



You can activate a form by selecting its row. Buttons at the top will allow you to activate the form for your agency. This will make them available to use when documenting incidents and records.



If your agency does not have your own custom form and you would like to create one, it is recommended that you save a copy of the state form and make your changes to it. Starting with a copy of the state form ensures that your new form collects all the new NEMESIS 3.5 data elements! New forms in NEMESIS Version 3.5 have 3.5 in the Name and Type columns.



If you are adding an element to your existing custom form, it is recommended that you save a copy of your custom form before making changes. By making a saved copy, your agency does not overwrite and potentially lose forms already created.

To save a copy of a form:

- Click on the row of the form you want to copy
- Click on the Copy button at the top of the list
- The copy form popup window will allow you to rename the form

The 'Copy Form' popup window has a title bar with a close button. It contains three dropdown menus and one text input field. The first dropdown is 'Copy into version' with '3.5' selected. The second dropdown is 'Agency copy is going to' with 'System' selected. The third dropdown is 'Form copy name' with 'EMS - Oregon 3.5 (Copy)' entered. At the bottom are 'OK' and 'Cancel' buttons.

You can now safely edit your new form!

Tools > Form Manager

You can see the newly created form under the Existing Forms. Click on the form name to start editing.

Note: All changes made to the form save immediately! If you are editing a form that is currently in use, changes to the template can affect documentation. We recommend temporarily inactivating the template you want to edit to prevent users from using the template.

Adding data elements to a form

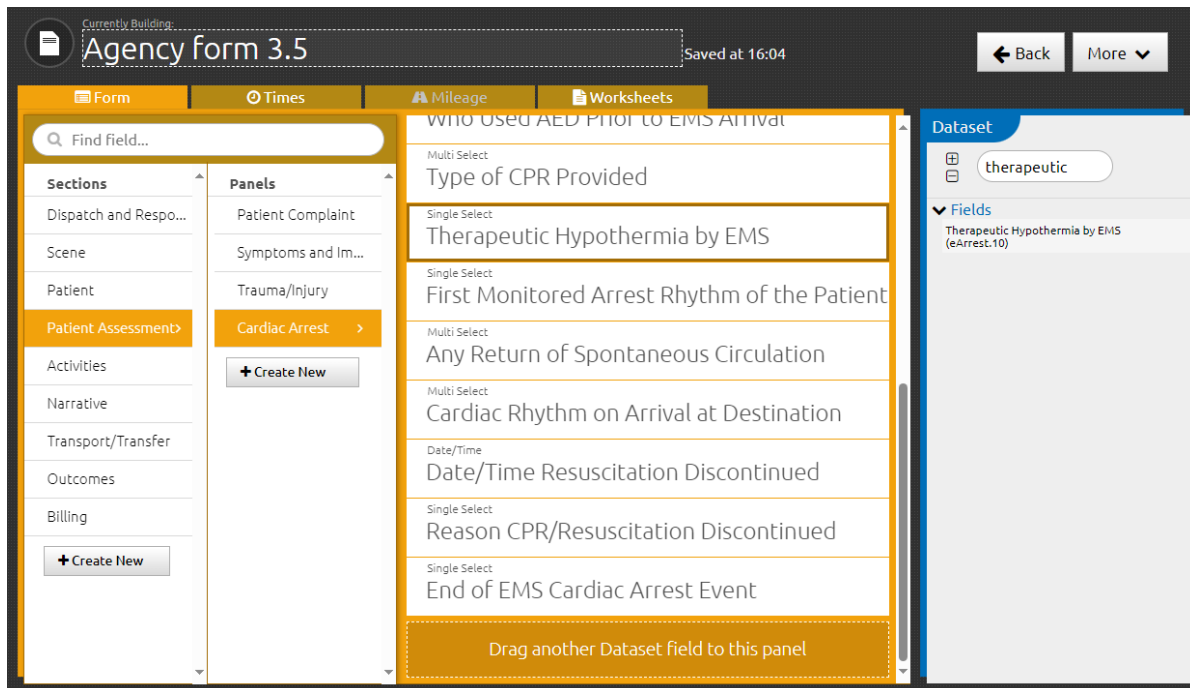
There are different ways in which you can add a data element to the form.

1. Add a data element 1:1 – Drag and drop the element into the form workspace

Under the Form tab of the form manager you can drill down to specifics moving from left to right, choosing first a Section, a Panel until you arrive at a list of data elements contained in the form. Note how these Sections and Panels correspond to the tabs you see in your ePCR form.

On the right-hand side there is a list of data elements that may be added to your form. You can search under the data element name and then drag the new element right into the form. You can change the order that data elements appear in your form by dragging as well.

The example below shows Therapeutic Hypothermia by EMS (eArrest.10) being added to the form:

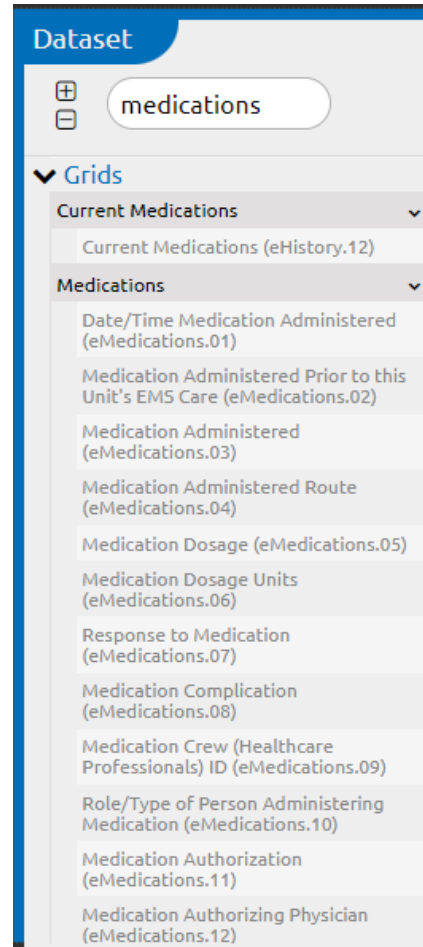


2. Add a data element as part of a grid

A grid is a box that holds multiple fields together in a form template. When you are working on a form, you will notice that grid's fields are grayed-out in the Dataset box if you haven't selected a specific grid. Grids also allow users to select multiple values one after another. For example, in the Medications grid, you can enter all the administered medications and then add more details to each one.

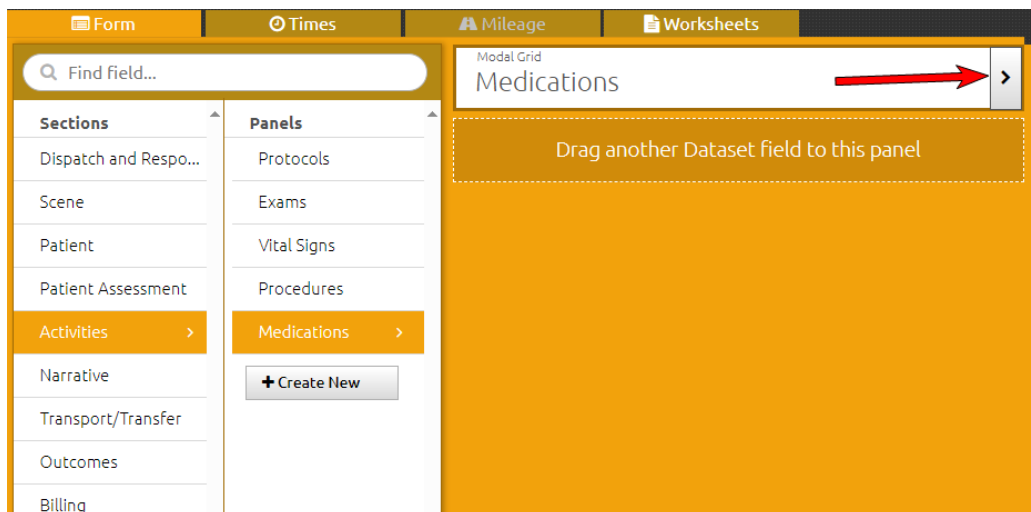
The grids are modeled after the NEMESIS data dictionary structure. Listed below is the eMedications Group and these are all the fields that you can place inside the Medications grid. No other fields can be added to the Medications grid and these fields cannot be added to another place outside of this grid.

N	S	eMedications.01	Date/Time Medication Administered
N	S	eMedications.02	Medication Administered Prior to this Unit's EMS Care
N	S	eMedications.03	Medication Administered
N	S	eMedications.04	Medication Administered Route
N	S	eMedications.05	Medication Dosage
N	S	eMedications.06	Medication Dosage Units
N	S	eMedications.07	Response to Medication
N	S	eMedications.08	Medication Complication
	S	eMedications.09	Medication Crew (Healthcare Professionals) ID
N	S	eMedications.10	Role/Type of Person Administering Medication

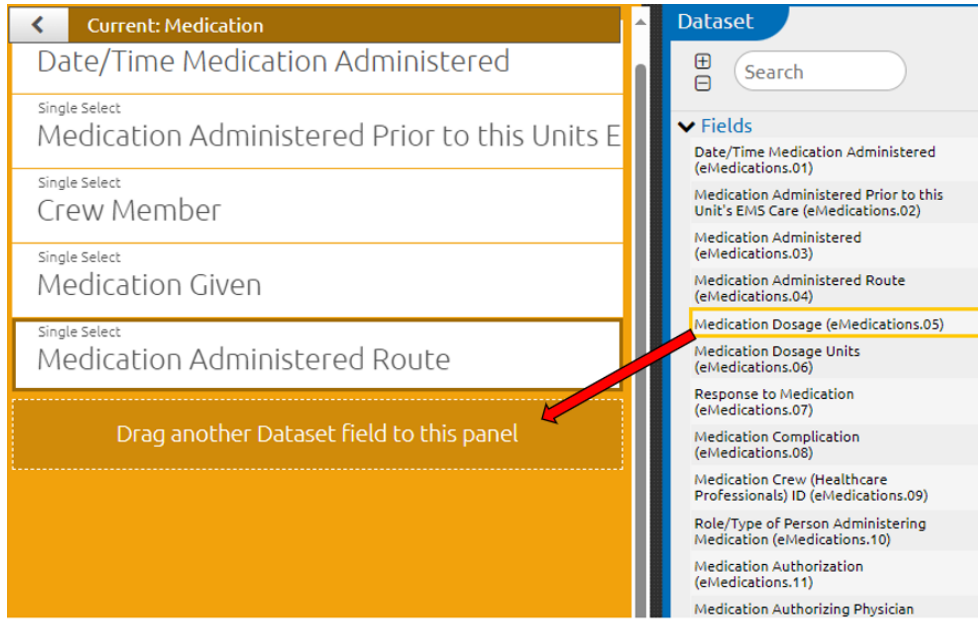


a. Existing - Open a grid and drag the element in

To open a Grid Section, click the arrow to the right of the grid name.



Drag fields from the Dataset box into your grid. The only fields or grids that appear in the Dataset box are those you can add to the current grid. Continue adding fields to this grid until finished.



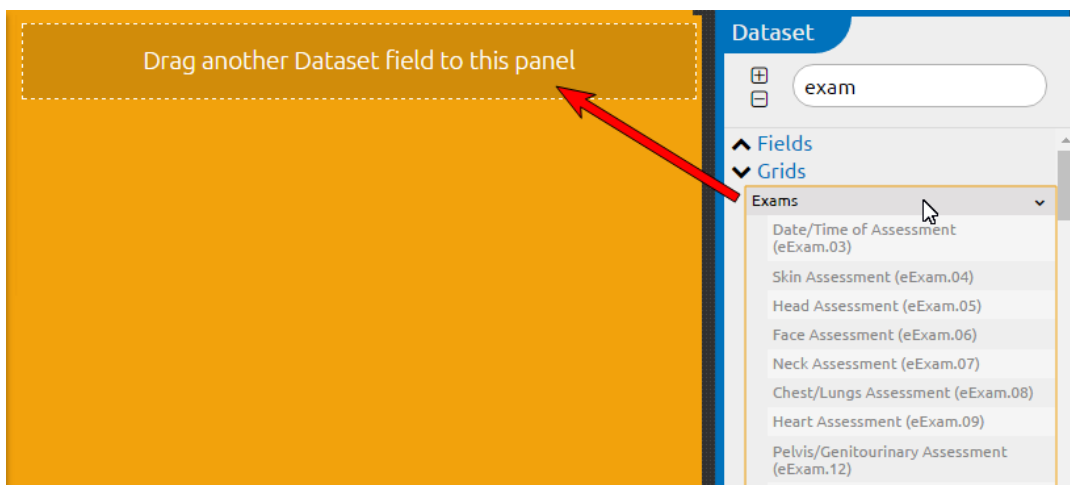
You can reorder the fields within a grid by dragging the field and moving it up or down the list.

b. New- Add a new grid and then add the element that grid

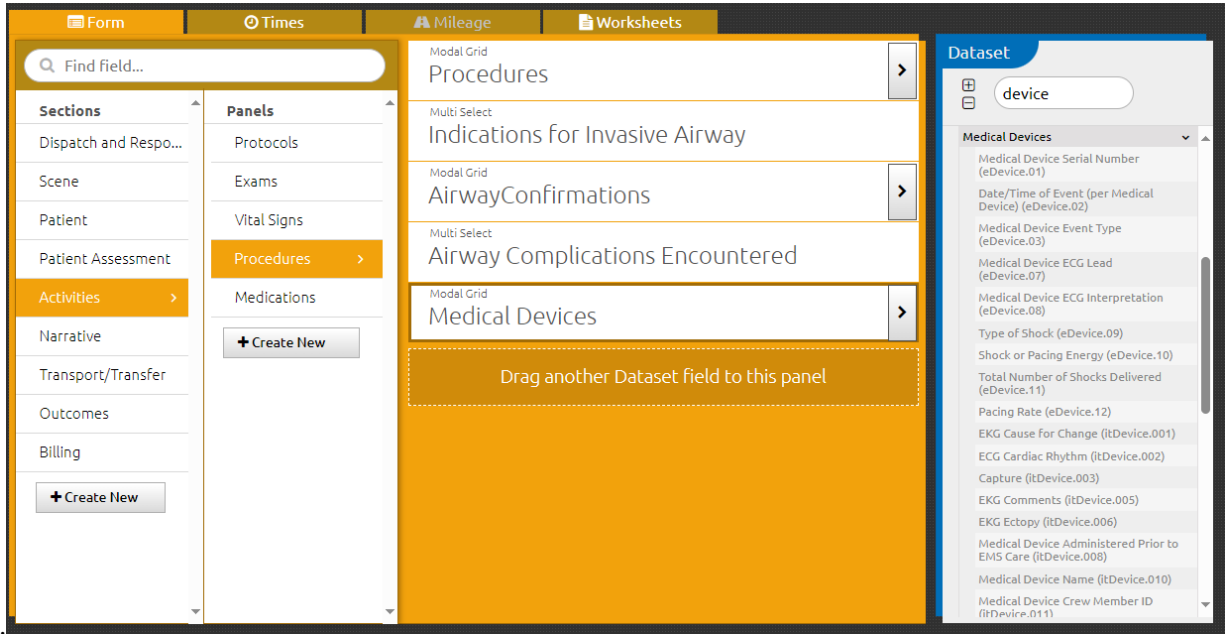
Non-State-Required data elements can be added to the form by adding additional grids.

Adding a grid:

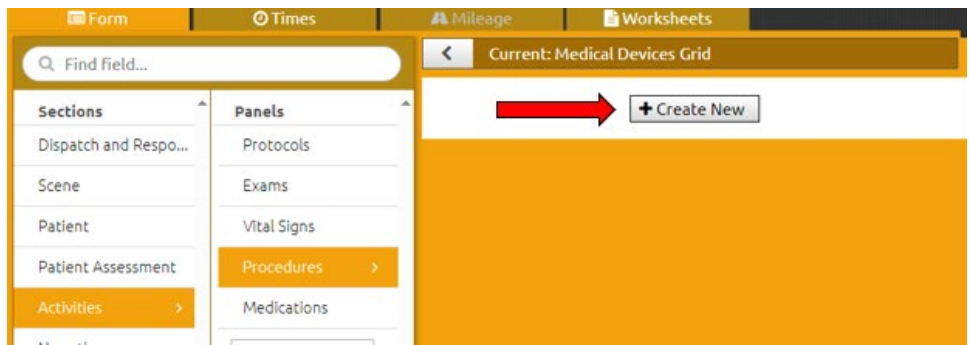
- Select the Section and Panel.
- Search for grids by their name or search for one of the data elements inside a grid.
- Drag and drop the grid into the form workspace.



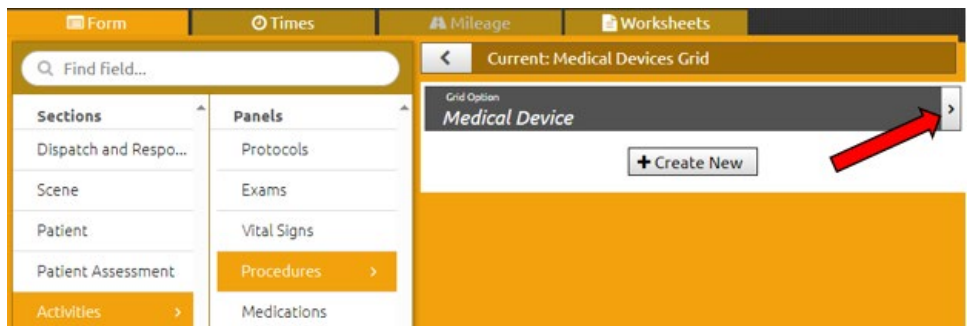
In the screenshot below you can see that Medical Devices grid has been added to the Oregon EMS form here:



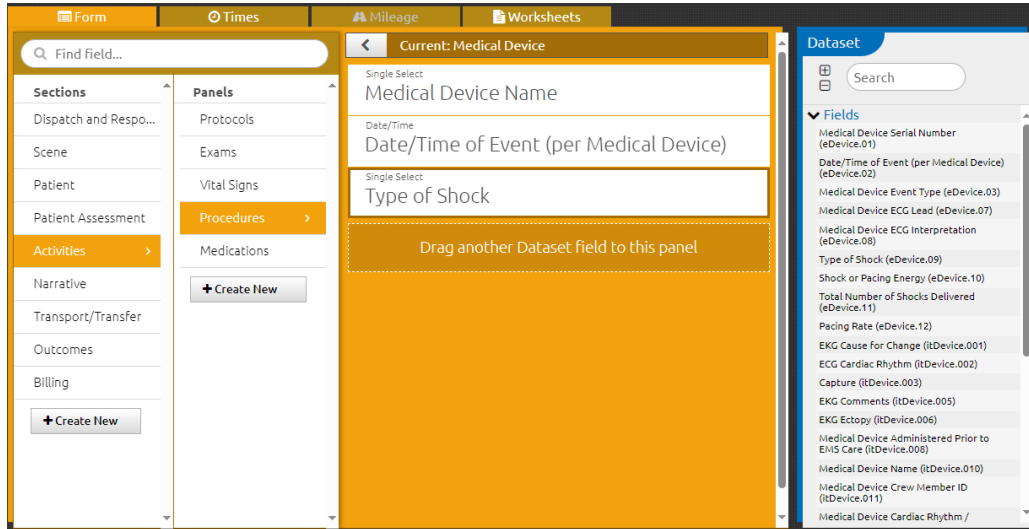
- Click on the arrow to the right of the Medical Devices grid.
- Click Create New to create a grid section. You must always create at least one grid section.



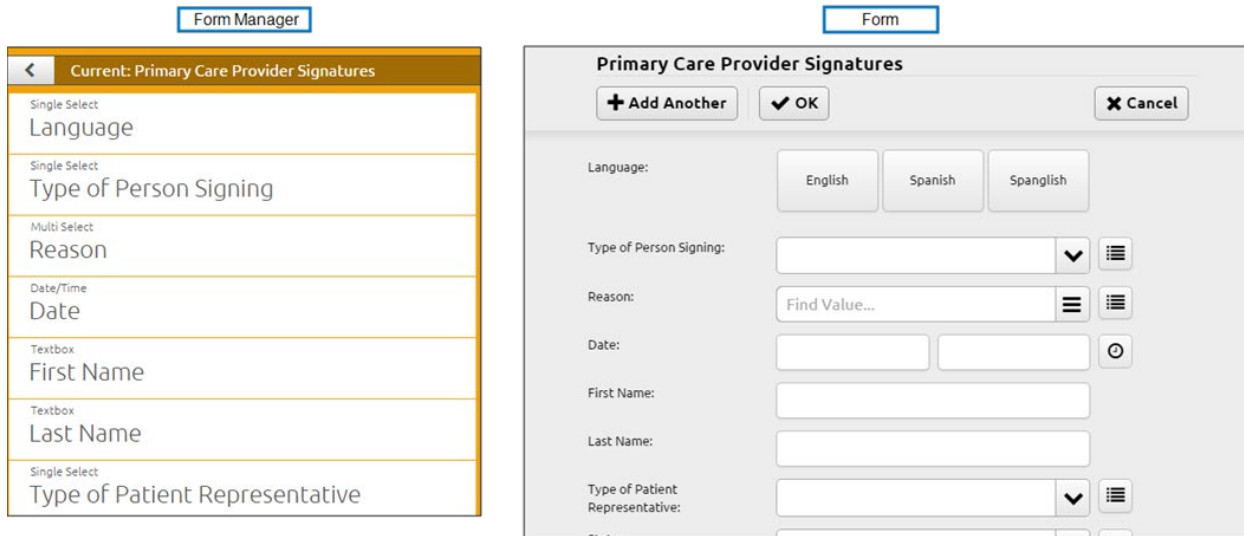
To add relevant elements to the new grid, click on the arrow to the right of the Medical Devices grid section.



You can now add new elements to the grid by searching in the dataset sidebar for the element and dragging it into the form:



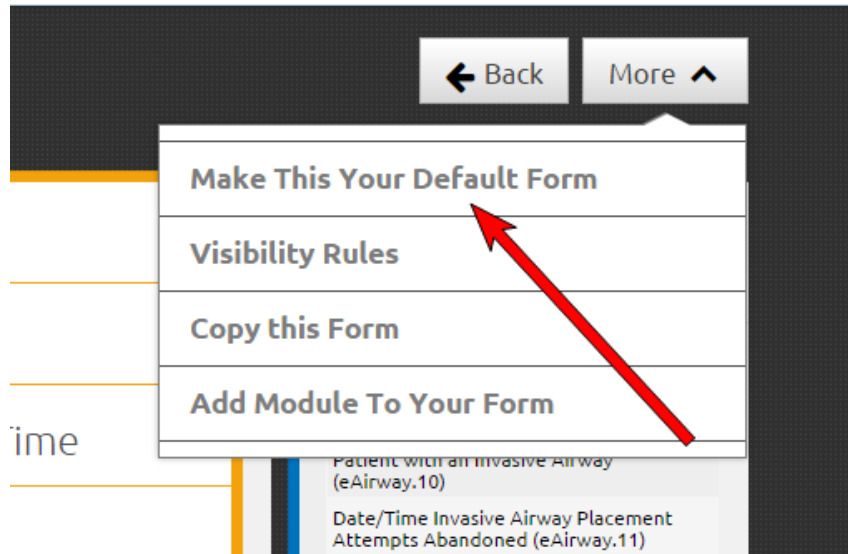
The image on the left is an example of a grid with many options. The image on the right, with the exact same options, is what the user will see on the form.



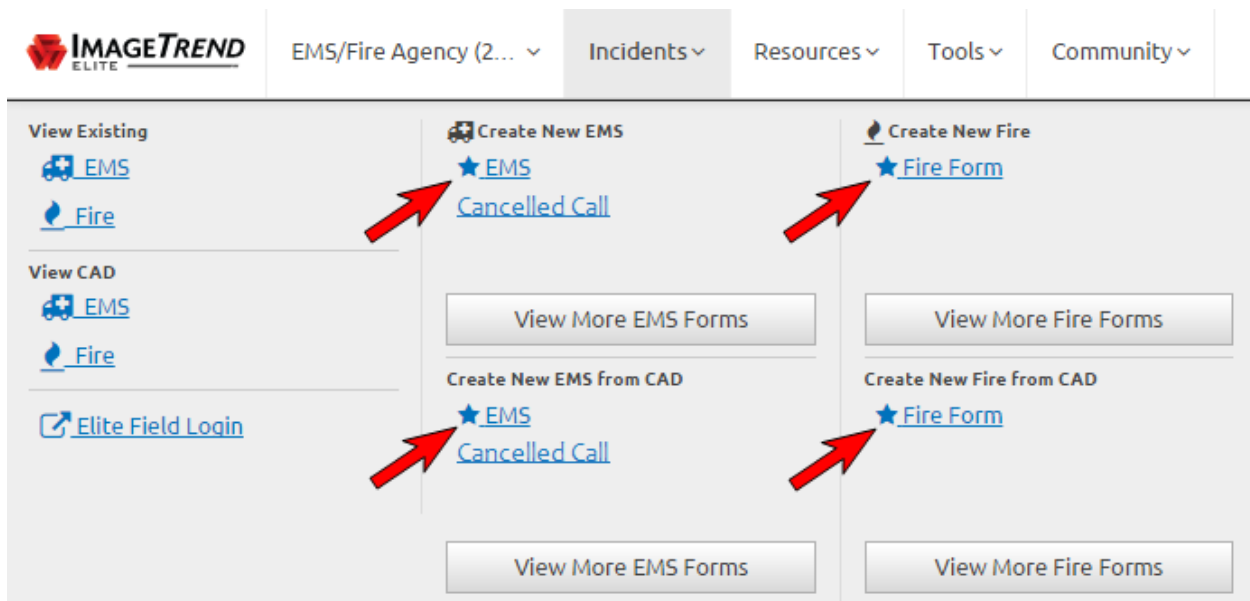
Setting a Default Form Template

There are two ways to set a default template:

1. Select a template on the Form Manager list page and click Set Default.
2. Open a template and click More > Make this Your Default Form.



You can only have one default for each type of form. The default template shows a star to left of the name and shows at the top of the list in the Incidents tab.

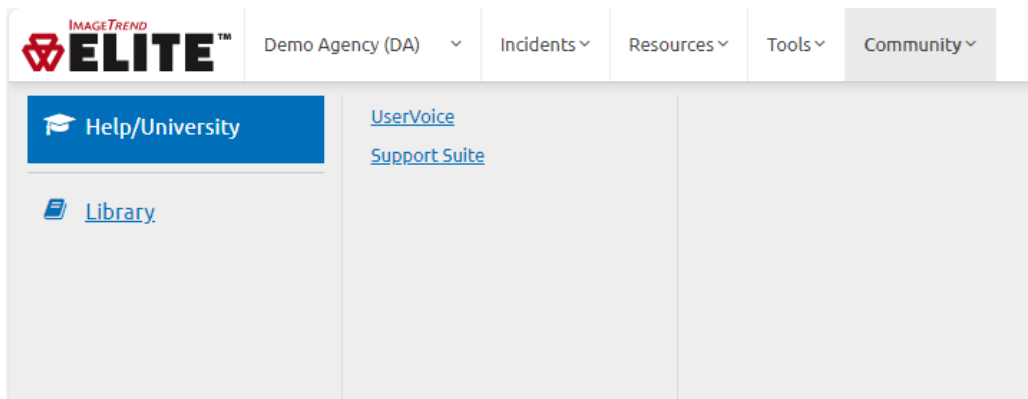


You are all set! Train your personnel on the new form, particularly the areas that changed and you're good to go!

Resources

If you have any questions or are curious about other features ImageTrend University is a good place to start.

Community > Help/University



You can learn more about Form Management under Form Template and Tools.

