This job aid is intended to guide PCVRS case users on creating and submitting reports using the New Report button on LPS. The job aid is also intended to guide QA Team users (RMS) on reviewing reports sent through the New Report button.

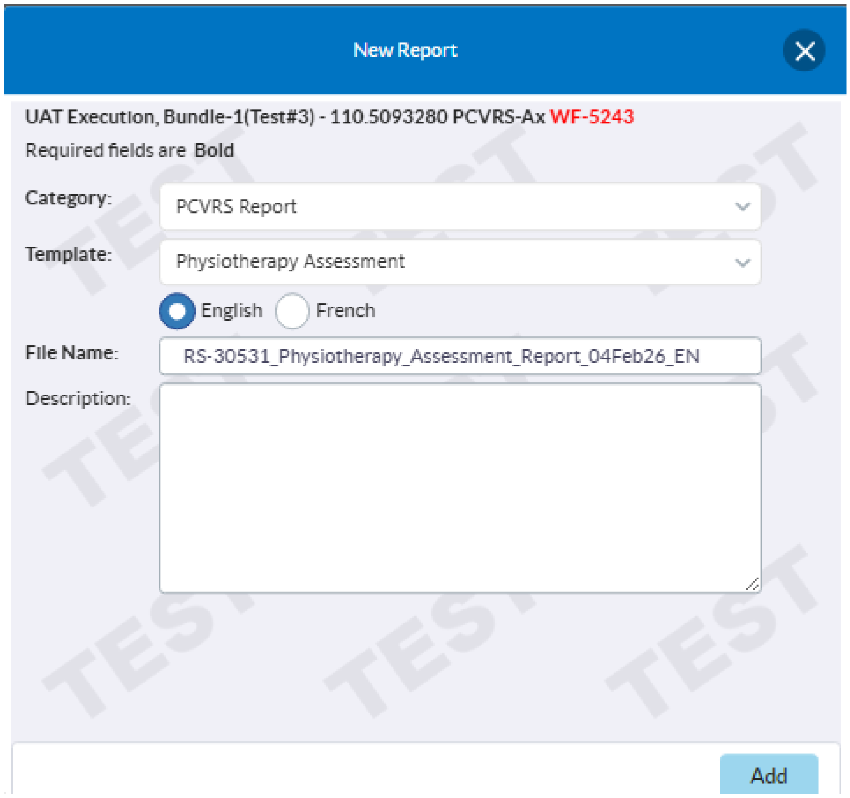
New process to send reports - LPS Users (PCVRS Team)

1. How to Create and Submit a New Report

a) In LPS, open a patient case that belongs to PCVRS.
b) Go to the Attachments tab and click the New Report button.

c) A pop-up window will appear and you need to choose:
   - Category: PCVRS Report
   - Template: Physiotherapy Assessment (The only template available at the moment).

- English (Default) or French.



d) Notice the File Name is automatically created for you (e.g., RS-99999_Physiotherapy_Assessment_Report_ddMMMyy_EN).
e) Click Add at the bottom right corner.
f) An editor that looks and feels like MS Word will open.
   - Patient information from LPS and Charting Portal will already be filled in.
   - Look for comments in some fields that provide guidance.
   - Fill in the remaining required information.

2. How to Save and Send the Report to QA

You have three options when you are done editing:

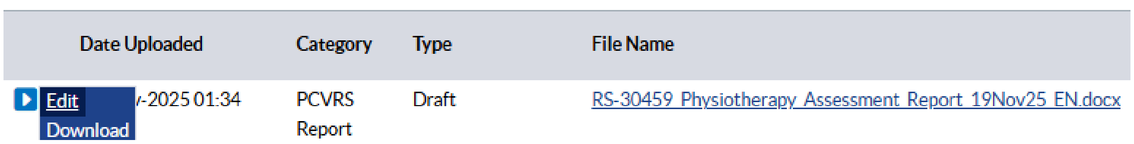
Option A: Save and Send Immediately

- If the report is complete and ready for the QA team to review, click the Save and Ready for QA button.
- The report is saved and automatically sent to the QA team for review.

Option B: Save as a Draft and Send Later

- If you need to stop and finish the report later, click the Save button.

- A draft of your report is saved in the attachments list.
- To finish your draft:
  1. Click the report's file name (it will be a link) to re-open it and continue editing.
  2. When you're ready to send it, click Save document and Ready for QA.
  3. Alternatively, you can use the menu: click the small triangle icon (▼) next to the draft, select Edit, change the Type to Report Ready for QA, and click Update.



Date Uploaded	Category	Type	File Name
Edit Download -2025 01:34	PCVRS Report	Draft	RS-30459_Physiotherapy_Assessment_Report_19Nov25_EN.docx

Option C: Delete a draft

- A draft can be deleted by clicking on the Delete Draft button.

3. How to Edit Requests from QA

If the QA team needs you to make changes, the report's Type in the attachments list will change to Report Edits Required.

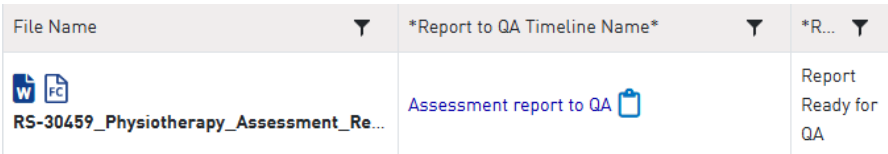
a) Click the report's file name to open it.
b) Look for comments from the QA team indicating what needs to be changed.
c) Make the required edits directly in the document.
d) Once you are done, you must resubmit it by clicking on the Save Document and Ready for QA button, or through the menu: click the small triangle icon (▼) next to the draft, select Edit, change the Type to Report Ready for QA, and click Update.

This sends the corrected report back to the QA team. This process can go back and forth until the report is approved.

New process to review reports - RMS Users (QA Team)

1. How to Find and Review a Report

a) In the RMS app, go to the Reports for QA tab. Reports with the status Report Ready for QA or Edited Report Ready for QA will appear here (the list updates every 30 minutes).



b) Find the report you want to review. You will see an FC (FormCentral) icon next to the file name.

c) Click the file name link to open the report in the editor.

d) Review the content of the report.

2. What to Do After Reviewing

Based on your review, you will either send it back for edits or approve it.

If the Report Needs Edits:

a) Add comments directly in the document to explain what changes are needed. Comments can be added by selecting a text in the document and then by clicking on the New Comment button. After each comment, click on the arrow button.

b) After all comments have been added, click on the Save button. After clicking on the Save button, click on the Cancel button to close the report.

c) Click the link in the “Report to QA Timeline Name” column for that report. The link text is “Assessment report to QA”.

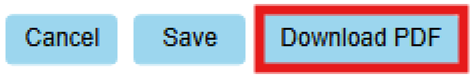
d) A pop-up window will open. Change the Status to Report Edits Required.

e) Click Save.

f) The report is sent back to the LPS user with a new status, letting them know that edits are needed.

If the Report is Approved and Final:

a) First, open the report by clicking the file name link.
b) Inside the editor, click the Download PDF option to save the final version to your computer.



c) Next, click the link in the "Report to RS Timeline Name" column for that report.
d) A pop-up window will open.
   - Change the Status to Completed.
   - Click the Upload button and select the PDF file you just downloaded.
e) Click Save.

Addendum: New Text and Paragraph Formatting Features

The form editor has been updated with advanced formatting capabilities, similar to Microsoft Word. You can access these options by right-clicking on selected text or by using the formatting toolbar in the top-right corner of the editor.

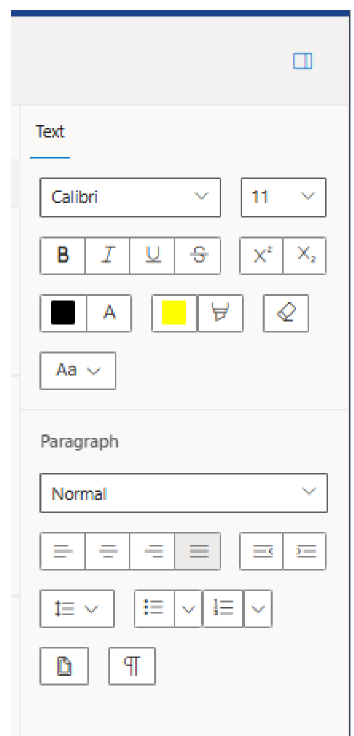
I. Formatting via Right-Click

When you select text and right-click, a context menu will appear with the following options:

- **Text Formatting:**
  - Font
  - Font Style (e.g., Bold, Italic)
  - Size
  - Underline Style
  - Font Color
  - Effects (Strikethrough, Subscript, Superscript, Double strikethrough, All caps)
- **Paragraph Formatting:**
  - General Alignment (Left, Center, Right, Justify)
  - Outline Level
  - Direction (Left-to-right, Right-to-left)
  - Indentation
  - Spacing (Before and after paragraph)
  - Line Spacing

II. Formatting via the Top-Right Toolbar

Clicking the formatting button in the top-right corner reveals a comprehensive toolbar with more options.



- **Text Formatting:**
  - Includes all options from right-clicking, plus:
  - **Highlight Text:** Apply a background color to text.
  - **Clear All Formatting:** Revert selected text to its default style.
- **Paragraph Formatting:**
  - Styles (e.g., Heading 1, Normal)
  - Alignment
  - Indent (Increase/Decrease)
  - Line Spacing
  - Bulleted List
  - Numbered List
  - Borders
  - **Show/Hide Hidden Characters:** Make formatting marks visible (e.g., spaces, tab characters, paragraph marks, and line breaks).

III. Spell Check

The form editor now includes an automatic spell checker for both **English** and **French**. Misspelled words will be underlined in red, allowing for easy identification and correction.