

Agency for Healthcare Research and Quality (AHRQ)  
Electronic Preventive Services Selector (ePSS) for  
Windows App

# Instructions for Use



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## Overview

This document provides instructions for viewing the US Preventive Service Task Force (USPSTF) recommendations using a tablet or computer with Windows 8 or later installed. The user can Search the database for specific recommendations using criteria filters including: age, sex, pregnancy status, tobacco use and sexual activity, Browse for all specific recommendations grouped by clinical topics or retrieve saved recommendations using Bookmarks. When using this tool please read the specific recommendation to determine if the preventive service is appropriate for your patient. This tool is not meant to replace clinical judgment and individualized patient care.

## Home Screen

The home screen (Figure 1) provides the following navigation buttons:

- search for recommendations - Search and display recommendations based on specific criteria
- browse by topic - Display recommendations by clinical topic
- browse by grade - Display recommendations by grade
- bookmarks - Display bookmarked recommendation and topics
- tools - display and, if configured, access USPSTF recommended screening tools
- grade definitions - View grade definitions for recommendations
- faq - Browse Frequently Asked Questions
- about - Display about ePSS and about USPSTF information

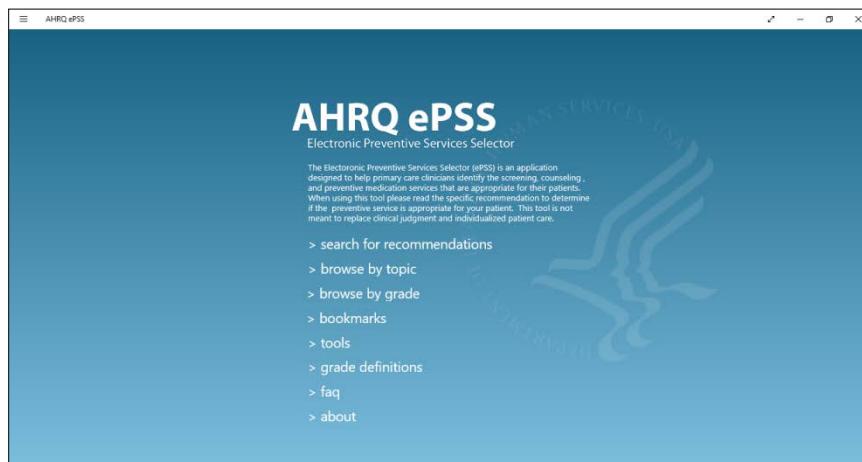


Figure 1: Home Screen

## Search for Recommendations

The "search for recommendations" option on the home screen is used to perform a targeted search for specific recommendations. Select the "search" button to initiate a search (Figure 2). Optional search criteria can be entered to filter results based on:

- Age between 0-99 (for infants under the ages of 1 year, enter 0)
- Patient gender by selecting the button "Male" or "Female". If the "Both" button is selected, recommendations for both Male and Female patients are displayed
- Pregnancy status, choose "Yes" to indicate pregnant
- Tobacco User, choose "Yes" for "Tobacco User"
- Sexually Active, choose "Yes" for "Sexually Active"

The "reset" button is used to clear the search criteria and start a new search; the "ePSS" button is used to return to the Home Screen. The Search screen can be accessed from anywhere within the application by selecting the "search" button from the top panel.

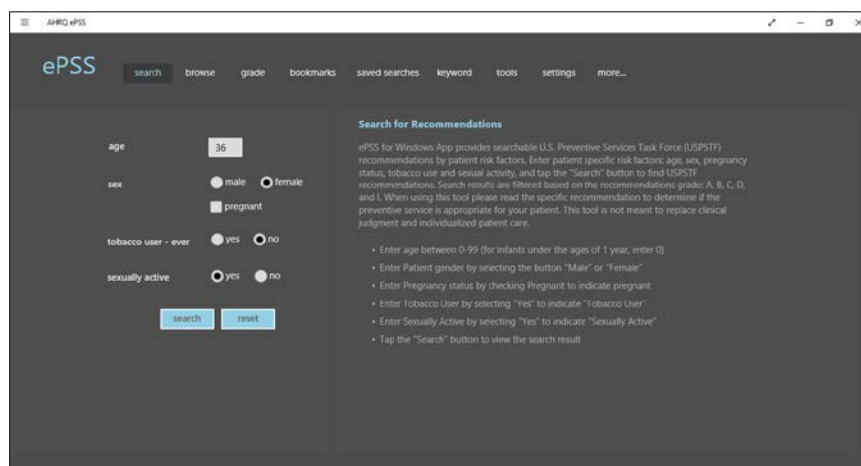


Figure 2: Search for Recommendations Screen

## Search Results Display and Navigation

The current Search Criteria is displayed above the search results (Figure 3), followed by a list of all recommendations matching the search criteria grouped into six tabs: View All, A, B, C, D, and I. The "View All" tab is selected by default and display all related recommendations. Swiping the Grade tab changes the display to include only recommendations for the corresponding grade level. In general, recommendations with grades A or B are grouped under the Category Recommended, grade C is grouped under the Category Selectively Recommended, grade D is grouped under the Category Not Recommended, and grade I is grouped under the Category Uncertain. An asterisk (" \*"), in front of the recommendation, indicates that the old grade definitions are associated. Touch the "search" button on the top to displays a new search screen. Select the Bookmark icon "🔖" on the top to Bookmark the selected recommendation. All bookmarked recommendations can be accessed from "bookmarks" screen. The "browse", "grade", "keyword", "tools", "bookmarks", and "saved searches" buttons on the top panel enable the user to switch between search modes.

Selecting a Recommendation on the Search Results list displays the Recommendation Details Screen, providing General Information about the Recommendation with the following tabs:

- general (Default Display): Displays the Detail, Grade, Frequency of Service (if available) and Risk Information (if available) for the selected Recommendation.
- rationale: This tab displays the Rationale information for the Specific Recommendation, or the Rationale information for the associated Clinical Topic, if available.
- clinical: This tab displays the Topic-level Clinical Consideration information for the selected Recommendation.
- others: This tab displays the Discussion and Other Sections information for the selected Recommendation.
- tools: This tab provides the Specific Recommendations, grades and qualified Screening Tools.

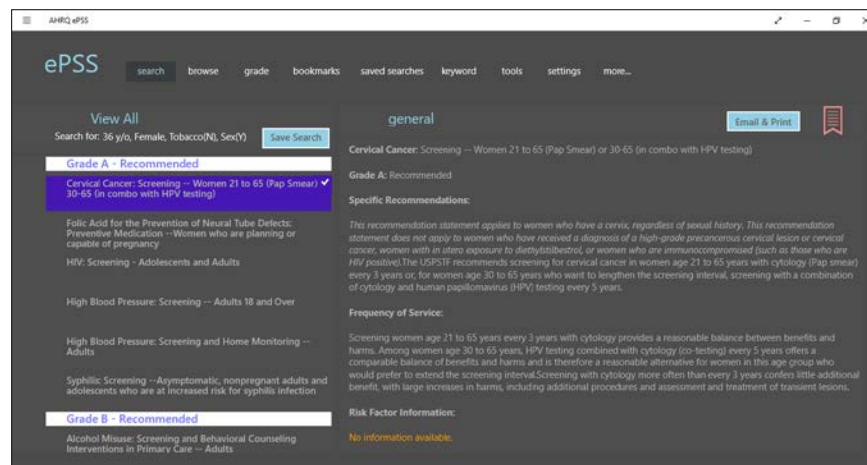


Figure 3: Search Results Screen

## Save Search

The ePSS application provides the capability to save a search for later retrieval. Select the Save Search button " **Save Search** " on the Search Results screen (Figure 3) to open the Save Search screen (Figure 4), and enter a title for the saved search and any additional notes. Select the Save button " **Save** ", to save the search criteria and results list.

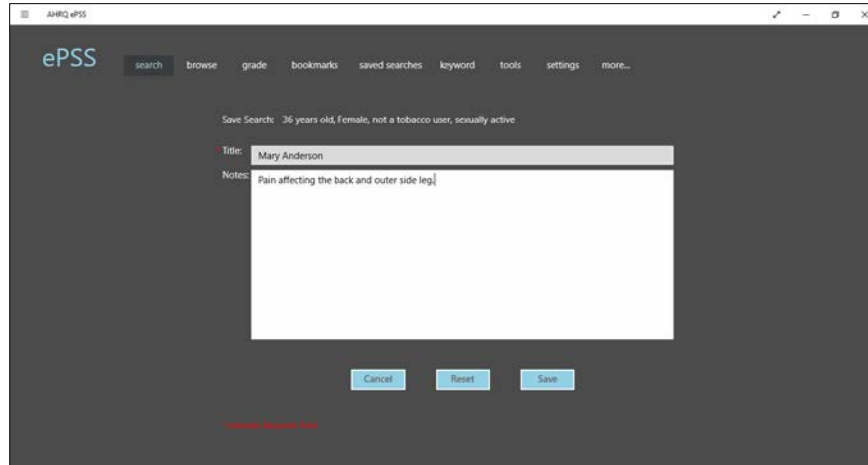


Figure 4 : Save Search Screen

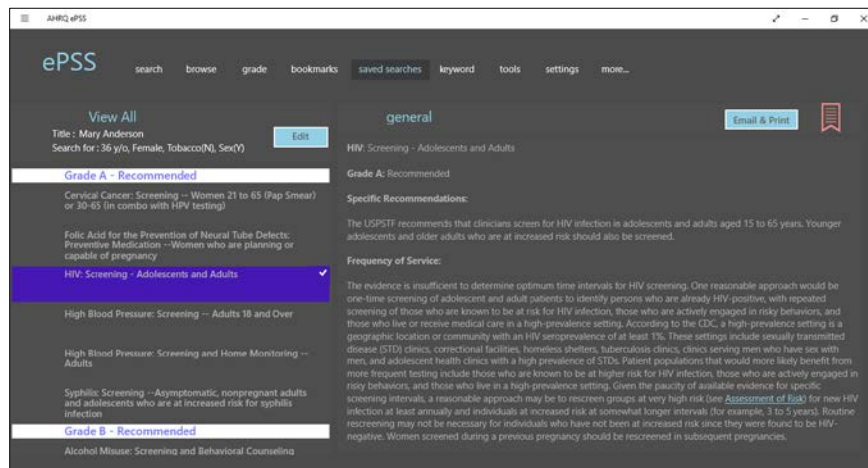


Figure 5: Saved Searches Recommendation screen

## Customized Search Results

Search Results can be edited to produce a customized recommendations list by categorizing Recommendations as relevant and non-relevant. Recommendations designated as non-relevant are removed from the results list. Removal only reclassifies the Recommendation in the Results List without deletion. Recommendations are removed by swiping a recommendation (Figure 6) and selecting Remove button "Remove", to move the selected recommendation to the non-relevant recommendation list which appears at the bottom of the Results List. A recommendation can be moved back to relevant list by swiping the title and selecting Add button "Add". Customized Result Lists can be saved for later retrieval as previously described in Save Search.

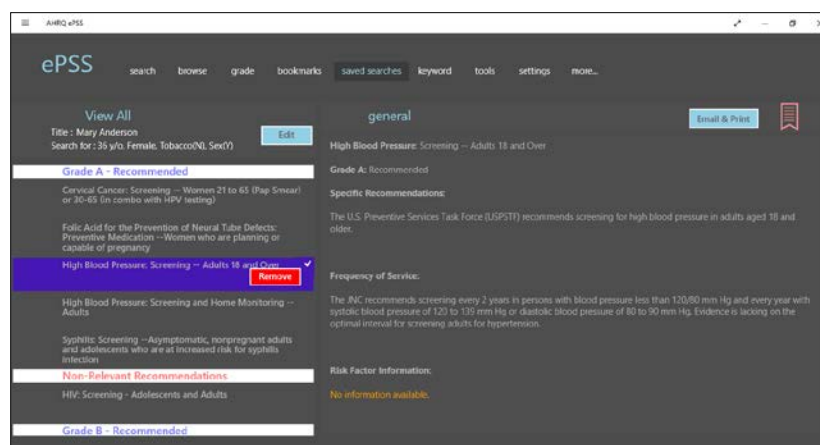


Figure 6: Customized Search Results screen



## Browse Recommendations by Topic

Browse by Topic displays recommendations by Clinical Topics (Figure 7). Browse by Topic can be initiated through selection on the Home screen, or by selecting the "browse" button from the top panel. The Topic Display is controlled using four tabs:

- view all: This tab displays a list of all USPSTF topics sorted in alphabetical order.
- counseling: This tab displays the list of USPSTF topics by Counseling category.
- preventive: This tab displays the list of USPSTF topics by Preventive Medication category.
- screening: This tab displays the list of USPSTF topics by Screening category.

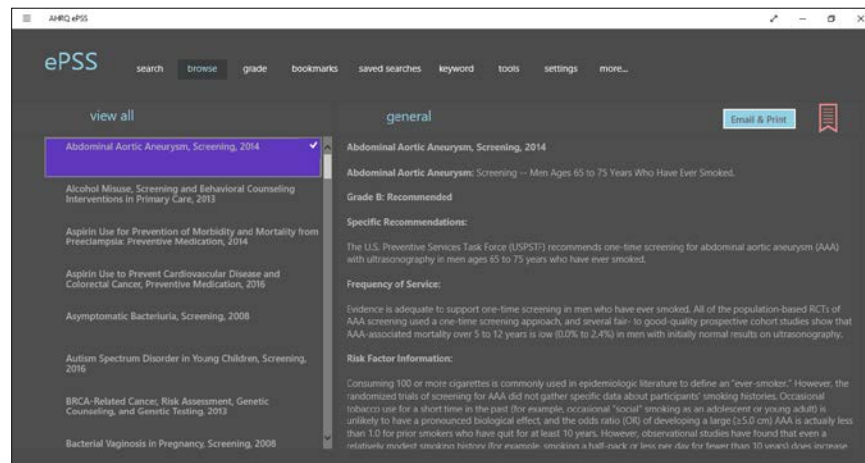


Figure 7: Browse by Topic Screen

Selecting a topic name displays the Specific Recommendations related to that Clinical Topic, and provides the following tabs:

- general (Default): Displays the Detail, Grade, Frequency of Service (if available), and Risk Information (if available), for each Specific Recommendation associated with the Topic.
- rationale: Displays the Rationale information for Specific Recommendations, or the Rationale information for the selected topic, as available.
- clinical: Displays the Clinical Consideration information for the selected Topic.
- others: Displays the Discussion and Other Sections information for the selected Topic.
- tools: Displays the list of Specific Recommendations, their Grade and qualified Screening Tools.

## Browse Recommendations by Grade

Browse by Grade displays recommendations grouped by Grades (Figure 8). Browse by Grade can be initiated through selecting "grade" button from the top panel. This screen has the same arrangements as the Search Results Screen (Figure 3). The "View All" tab is selected by default and display all recommendations. Swiping the Grade tab changes the display to include only recommendations for the corresponding grade level. An asterisk (" \*"), in front of the recommendation, indicates that the old grade definitions are associated. Select the "Bookmark" icon on the top to Bookmark the selected recommendation.

Selecting a Recommendation on the Recommendations list displays the Recommendation Details Screen, providing General Information about the Recommendation with the following tabs:

- general (Default Display): Displays the Detail, Grade, Frequency of Service (if available) and Risk Information (if available) for the selected Recommendation.
- rationale: This tab displays the Rationale information for the Specific Recommendation, or the Rationale information for the associated Clinical Topic, if available.
- clinical: This tab displays the Topic-level Clinical Consideration information for the selected Recommendation.
- others: This tab displays the Discussion and Other Sections information for the selected Recommendation.
- tools: This tab provides the Specific Recommendations, grades and qualified Screening Tools.

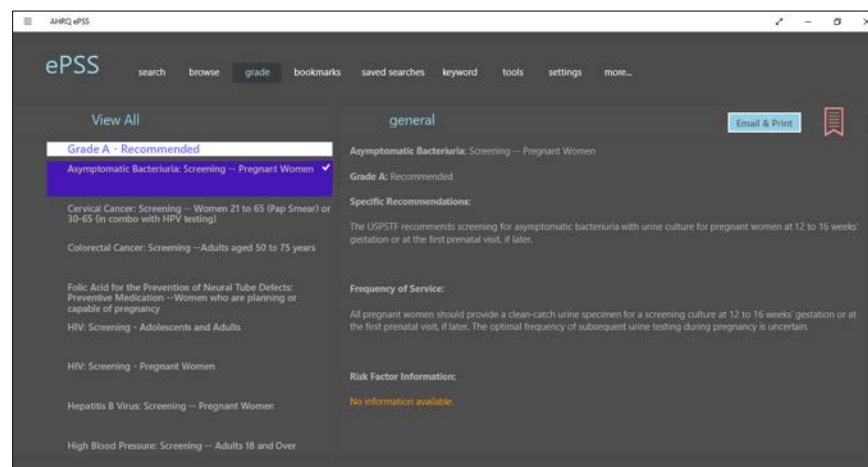



Figure 8: Browse by Grade Screen

## Email/Print/Bookmark Results

Select the " **Email & Print** " icon to initiate Print and Email functions (Figure 9) from a results screen. Select the "Email" option to open the Compose a Message screen. Enter the recipient email addresses, subject and send the email. Recommendations are included as an HTML attachment to the email message. The ability to email requires an appropriately configured email account on a Windows computer.

Open the " **Email & Print** " icon and select the "Print" option to choose the printer, specify a page range, number of copies and print Search or Browse results as described above.

Similarly, select the bookmark icon  to save Recommendations and Topics for later recall using the "bookmarks" button on the top.

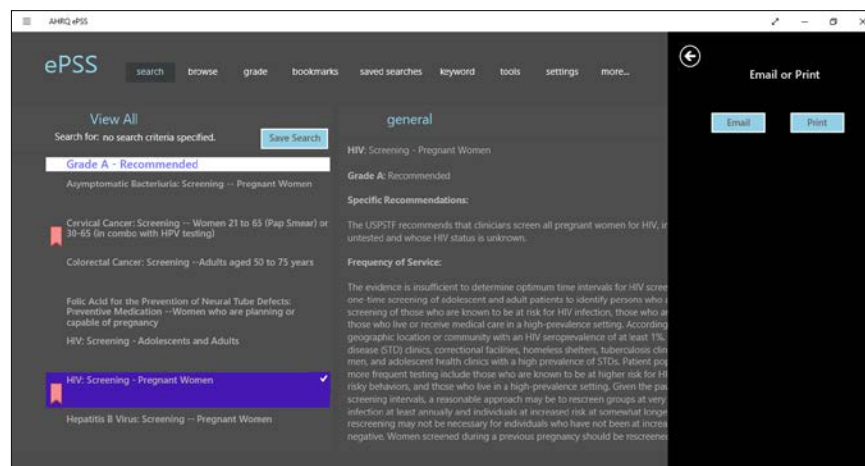


Figure 9: Email/Print Screen

## Bookmark Search

Select the "bookmarks" button on the top to view a list of bookmarked recommendations and topics, as shown in Figure 10. Bookmarks screen will display a list of bookmarked recommendations by default. Select a bookmarked recommendation to view the details on the right. Bookmarked recommendations can be removed by selecting the bookmark icon "🔖" at the top right. This screen provides the same navigation features as the Search Results screen (Figure 3).

Swipe "recommendations" to "topic" tab at the top on the left panel to view to a list of bookmarked topics. This screen provides the same navigation features as the Browse by Topics screen (Figure 7).

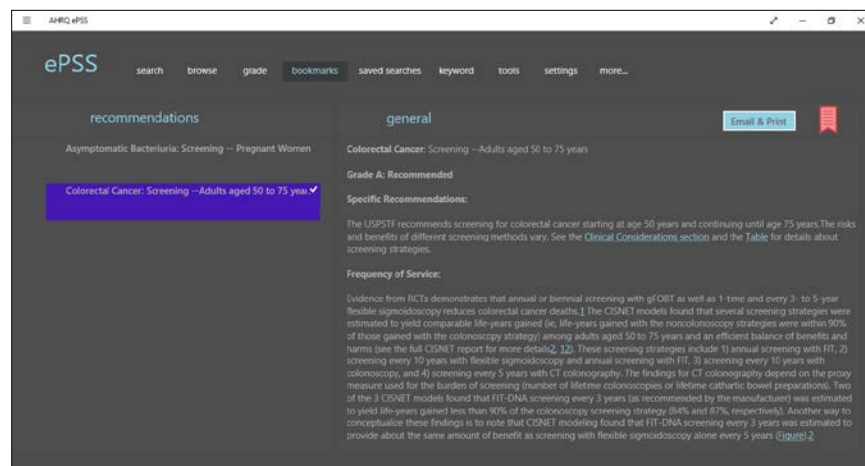


Figure 10: Bookmarks Screen

## View/Print/Email Saved Searches

Select the "saved searches" button on the top to view a list of Saved Searches as shown in Figure 11. Select a saved search from the list to view the search details screen (Figure 12).

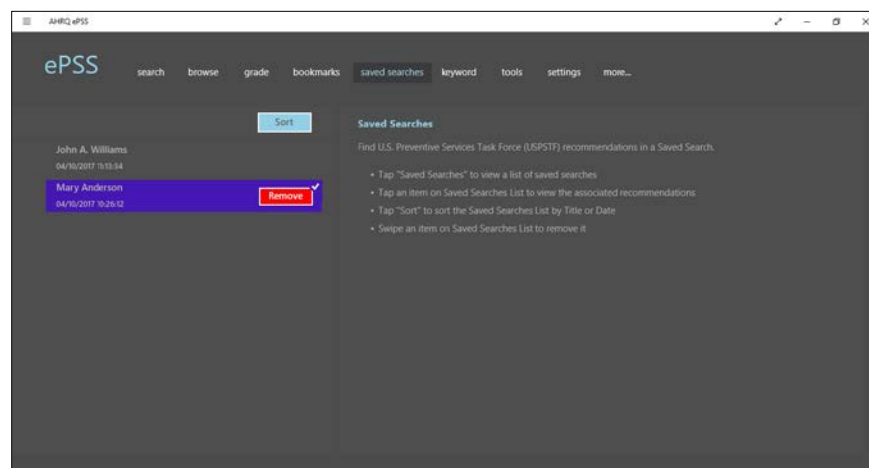


Figure 11: Saved Searches List screen

Click the "Email & Print" button to choose between Current and All. The All option will print or email all recommendations in this saved search while Current only the current viewed one.

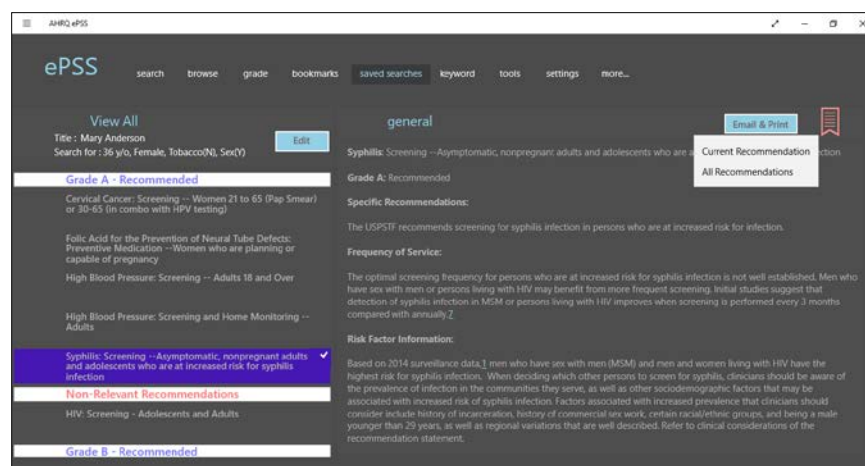


Figure 12: Print/Email Saved Search Details Screen

Select either the "Current Recommendation" or "All Recommendations" to open an Option Charm (Figure 13) for chose recommendation Grades between "AB" and "All Grades", and Content between "Topic Only" and "Full Detail".

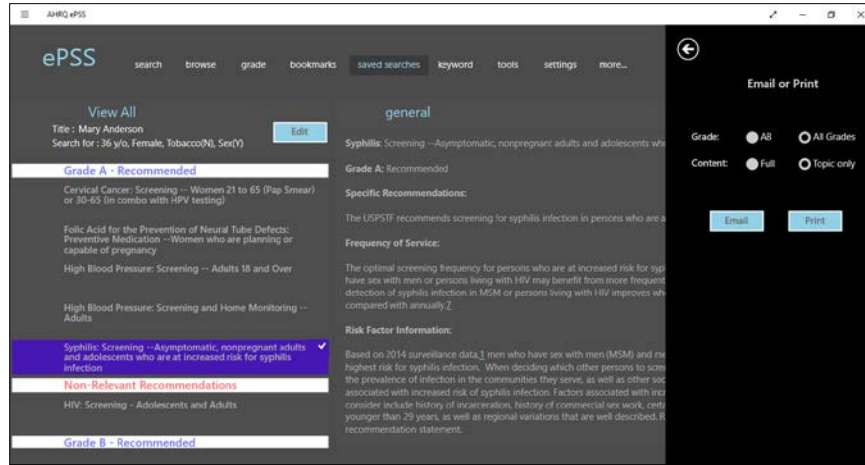


Figure 13: Email/Print Option Screen

# Personalization

The Setting feature provided by ePSS can be used to enter information that is included in emails, and in the header of printed results. Select the "Settings" on the top to open the Settings Screen (Figure 14).

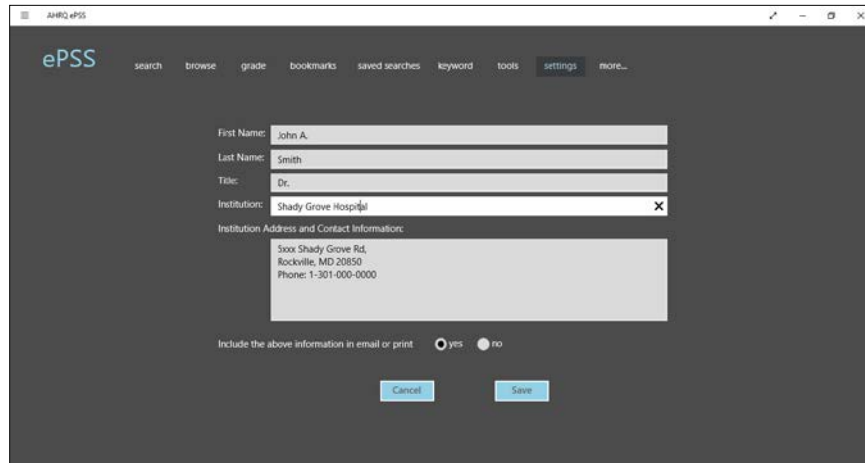


Figure 14: Settings Screen

Figure 15 provides an example of personalized email attachments using the data entered into the Settings Screen (Figure 14).

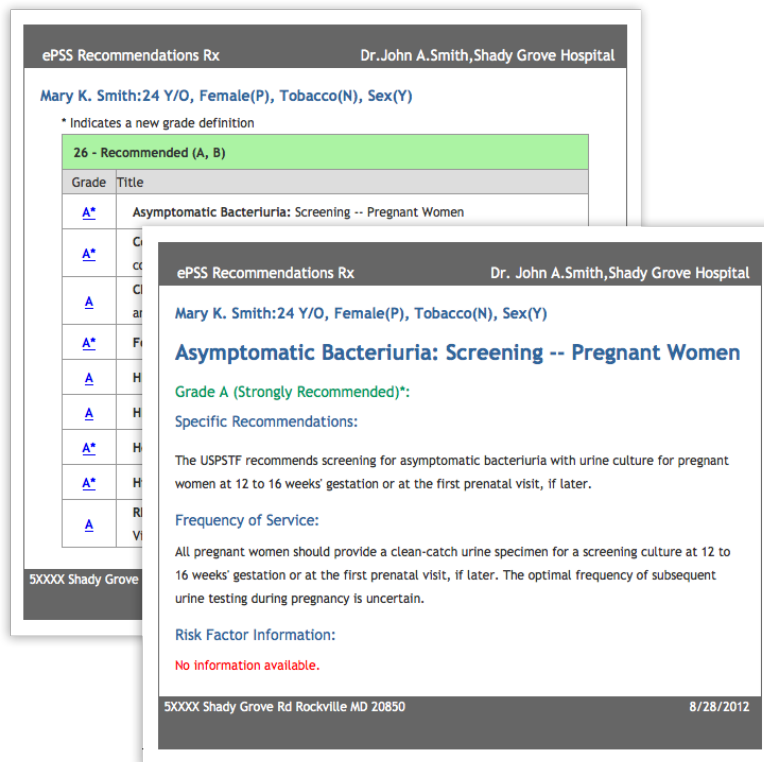


Figure 15: Personalized Email Attachments

## Keyword Search

The ePSS application provides the capability to search recommendations using a keyword. Select the "Keyword" button on the top panel to open the Keyword screen (Figure 16). Enter a keyword and then tap "Search" to view the search results listed by Clinical Topics. Matching keywords are highlighted.

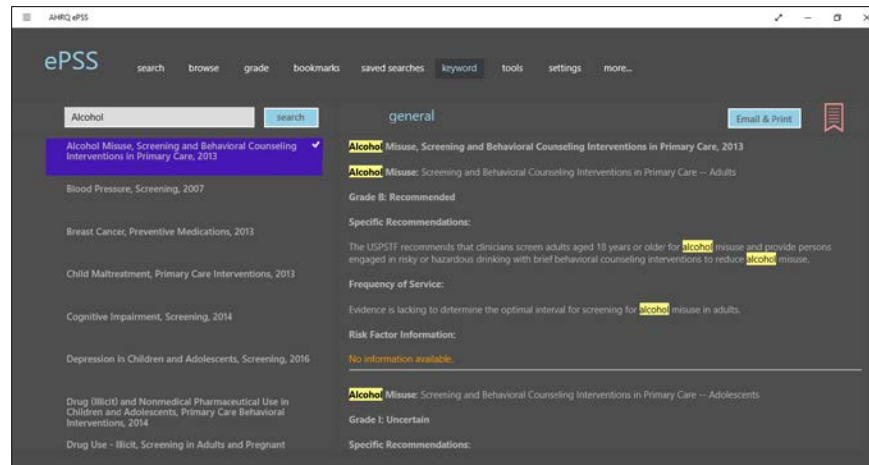


Figure 16: Keyword Search Screen



## Tools

Based on recommendations from the USPSTF, these tools are designed to help clinicians access information at the point of care. The ePSS application provides clinicians with a convenient mechanism for accessing available tools directly, without searching and viewing recommendations.

Select the "tools" button on the Home screen, or select Tools from the main screen to view the USPSTF recommended screening tools (Figure 17). A cellular data or WiFi internet connection is required to access these tools.

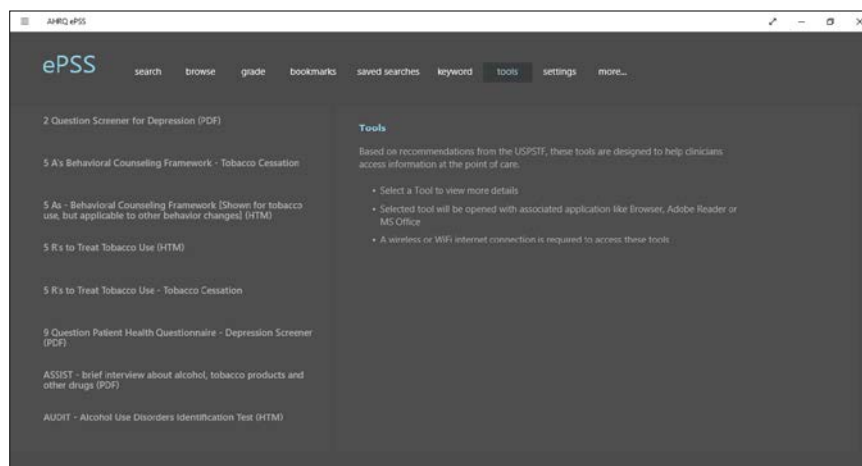


Figure 17: Tools Screen

## Information Screens

The Information pages displayed on Home screen (Figure 1) can be used to display general information about the ePSS application, and to access specific features and customization options including:

- About
- Grade Definitions
- FAQ

Select "more..." button from the top panel of the main screen (Figure 18) to view the all information pages.

- About
- Grade Definitions
- Instructions for Use
- Frequently Asked Questions (FAQ)
- Subscribe
- Recommendations Disclaimer

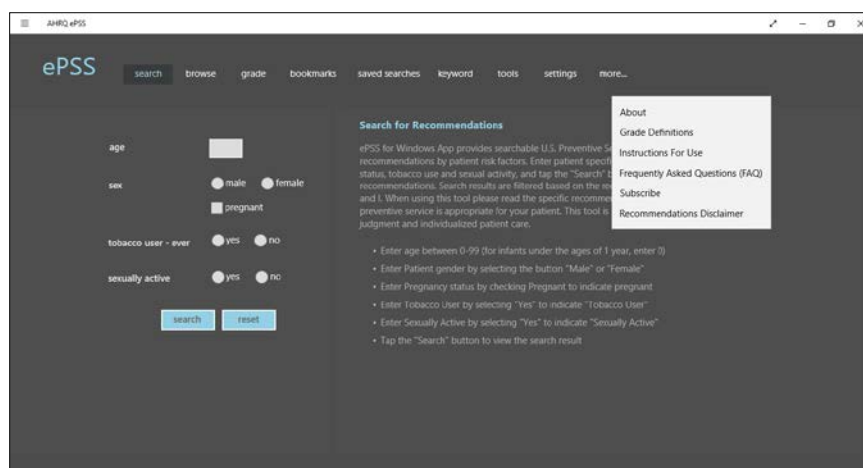


Figure 18: More Screen

## Recommendation Updates

The ePSS Windows App automatically checks and updates the application with the most recent ePSS recommendations upon application launch. A wireless or WiFi internet connection is required to access recommendation updates.