

eConsult: Assigning Consult Requests

A group, program, or BASE Managed Specialty Group is a set of specialists that share an eConsult 'assigner'. This person manages consult requests, receiving the requests and distributing them to specific specialists within the group.

Each group has one or more 'assigners', who receive consult requests submitted to the group.

There are three types—a basic assigner, a department assigner, and a triage assigner.

	Basic Assigner	Department Assigner	Triage Assigner
Assign	✓	✓	✓
Un-assign	✓	✓	✓
Cancel	X	✓	✓
Redirect	✓	✓	✓
See patient demographics	conditional*	conditional*	✓
See patient name	X	conditional*	✓
See full case details	X	X	✓
See "case returned" comments	✓	✓	✓

You can access the details of a case in one of two ways.

- A. From the eConsult email you received.**
 - i. Open an email from eConsult and click the active link.
If you're not already logged in, a sign-in screen appears.
 - ii. Log in using your OTN or ONE ID credentials.
The eConsult dashboard appears with the case details in the right-most panel.
- B. From the eConsult links on the OTNhub.**
 - i. Sign in at otnhub.ca and go to the eConsult service.
The eConsult dashboard appears with the **Needs Attention** filter activated in the navigation panel.
 - ii. In the **Case List**, look for a case with the status 'New case submitted' or 'Needs assignment'.

Table of Contents

- Assigning a Consult Request..... 2
- Un-assigning a Consult Request.... 3
- Cancelling a Consult Request 4
- Re-Redirecting a Consult Request..... 5

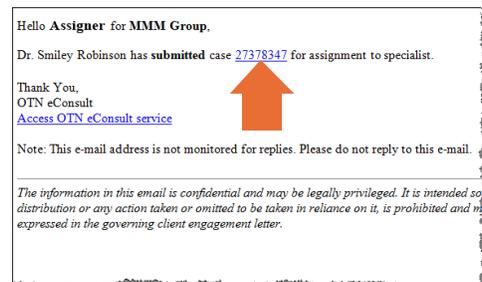


Figure 1: Assigner email notification

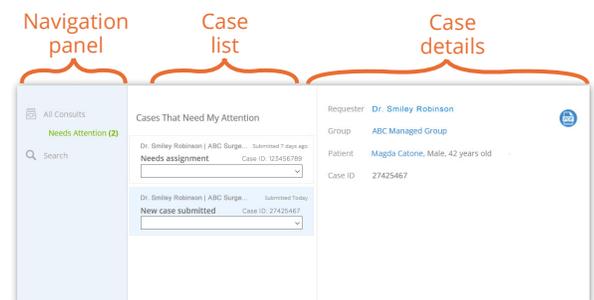


Figure 2: eConsult dashboard

*Patient data appears only while the consult request has a status of "Needs Attention".

Assigning a Consult Request

The Assigner needs to review and **assign a consult request** when:

- A new request is submitted to a group. It appears in the Case List with a status of 'New case submitted'.
- A specialist within the group has returned the case. It appears in the Case List with a status of 'Needs assignment'.

1. If you are an assigner for more than one group, an **All Groups** drop-down appears at the top of the case list. To filter the case list for only one group, click the drop-down arrow and select the group whose cases you want to see.
2. To view a list of specialist names associated with the group, click the Specialist drop-down arrow in the Case List.

A drop-down list appears listing all the specialists in the group. Each specialist's name appears with:

- The number of cases assigned to them in the last 30 days.
- The number of their cases that are pending a response.
- If the specialist will become unavailable within a week, their unavailable dates appear.
- If the specialist has restrictions for accepting cases, their name appears in grey text and you cannot assign them the case. For example, if they accept patients only within a specific age range or only from specific regions.

3. Select the specialist to whom you want to assign the case.

The selected specialist name appears in the field and two action buttons appear – **Assign** and **Unassign**.

4. To submit and send the case to the selected specialist, click the **Assign** button.

When you assign a consult, eConsult does the following:

- Saves the consult and sets the status to 'Case assigned'.
- Briefly displays a success message.
- Returns you to the eConsult dashboard and the case no longer appears in your "needs attention" Case List.
- Sends an email notification* to the specialist.

* The email recipient might have turned off their eConsult email notifications.



Figure 3: Available groups drop-down list



Figure 4: Assigner dashboard with 'Needs Attention' case list

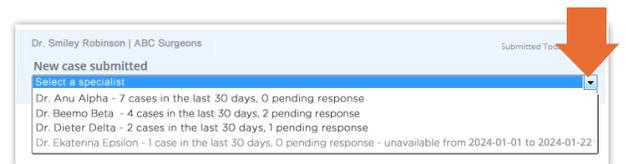


Figure 5: Specialist drop-down list

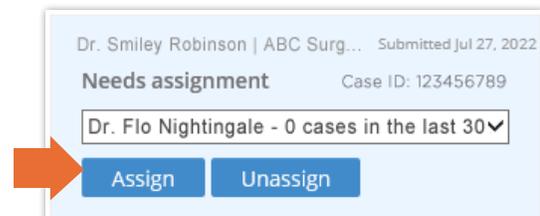


Figure 6: Assign case to specialist

Un-assigning a Consult Request

A group's assigner can un-assign a case after the case has been assigned to a specialist, but the specialist has not yet responded and it still has a status of 'New case submitted'. (That is, the specialist has not provided a consult or asked for more info.)

1. Sign in at otnhub.ca and go to the eConsult service.

The eConsult dashboard appears with the **Needs Attention** filter activated in the navigation panel. However, the case list will not include any cases that have been assigned but not yet actioned by the specialist.

2. Search for and locate the desired case and then view the case details. For example:
 - To view your full case list, click **All Consults** in the left navigation panel and then locate the case in the case list.
 - If you know the Case ID, click **Search** in the left navigation panel and type the Case ID in the Search field.

Both the case list item and the case details appear with a greyed-out **Assign** button and an active **Unassign** button.

3. To un-assign the case from the designated specialist, click the **Unassign** button.

When you un-assign a consult, eConsult does the following:

- Saves the consult and flags it as 'Case unassigned'.
- Briefly displays a success message.
- Returns you to the eConsult dashboard and the case appears in your 'Needs Attention' case list.
- Sends an email to the previously assigned specialist informing them that they are no longer associated with the case.

After you have successfully unassigned a case, you can [assign](#) a different specialist from the group.

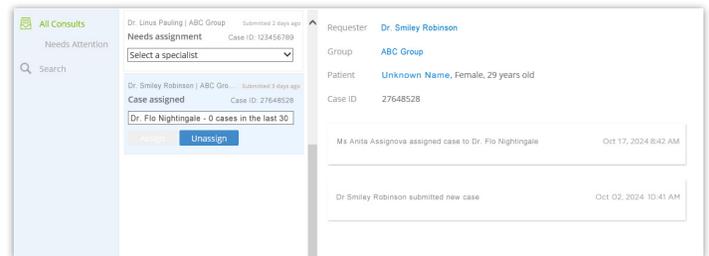


Figure 7: Assigner dashboard with 'All Consults' case list and an 'assigned' case details

Cancelling a Consult Request

For cases submitted to a **group** or a **BASE Managed Specialty Group**, only a 'Departmental Assigner' or a 'Triage Assigner' can cancel a case.

For example, when an assigner notices what seems to be two identical cases. The assigner first contacts the requesting provider to confirm the duplication and after confirmation can cancel the duplicate case.

The assigner **cannot** cancel a case if:

- it has already been assigned to a specialist, or
- the specialist has declined the consult and returned the case for re-assignment

After a case cancelled:

- No one can edit it.
- All parties involved in the case can view it.
- Patient information is hidden.

1. Sign in at otnhub.ca and go to the eConsult service.

The eConsult dashboard appears with the **Needs Attention** filter activated in the navigation panel. However, the case list will not include any cases that have been assigned but not yet actioned by the specialist.

2. Search for and locate the desired case and view the case details. For example:

- To view your full case list, click **All Consults** in the left navigation panel and then locate the case in the case list.
- If you know the Case ID, click **Search** in the left navigation panel and type the Case ID in the Search field.

3. To initiate the cancellation, click **Cancel** in the Case Details panel.

A new section appears with a confirmation message, "Are you sure you want to cancel the case?"

4. To confirm the cancellation, click **OK**.

When you cancel a case, eConsult does the following:

- Saves the case and sets the status to 'Cancelled'.
- Briefly displays a success message.
- Sends an email notification to the requesting provider (and their delegates).



Figure 8: Case details with cancellation fields

Re-Directing a Consult Request

When re-directing to a different recipient, eConsult creates a new consult request but with the patient information, notes, and attachments from the original request. Examples of when you might change the recipient include:

- When the originally assigned specialist has not replied to the initial case. The assigner stops waiting for a response and wants to consult with another specialist.
- When a specialist has declined the consult and returned the case. The assigner wants to send the same case to another recipient without having to re-enter the request information.

A group assigner can re-direct a case only if the specialist has not yet provided a consult.

You cannot forward a completed or cancelled case or a case where the specialist has already provided a consult.

After you re-direct a case, the new case includes the following:

- A new Case ID with the clinical question and only the notes and attachments that were part of the initial request.
- Does not include any notes or attachments associated with the information exchange between the original specialist and requester.
- The assigner will not have access to the new case that was submitted to the new recipient. The assigner can still access the original case in the “All Consults” folder (but patient information is hidden).

1. Locate the desired case and [un-assign](#) it.
2. To initiate the re-direct process, click  **Re-direct** in the Case Details panel.
A **Re-direct** section appears.
3. Identify the **Model** and then search for and select a new recipient. (For details about this and other fields and actions, refer to instructions in [Requesting a Consult](#).)
4. To submit the re-direct, click  **Re-direct**.
A confirmation pop-up appears.
5. To confirm, click  **Re-direct**.

When you re-direct the case, eConsult does the following:

- The original case is closed with a status of “cancelled” and it becomes read-only for all parties involved.
- Saves the consult request with a new Case ID, and the case is available to the new recipient.
- Sends an email notification* to the new recipient and to the requesting provider.
- Briefly displays a success message.

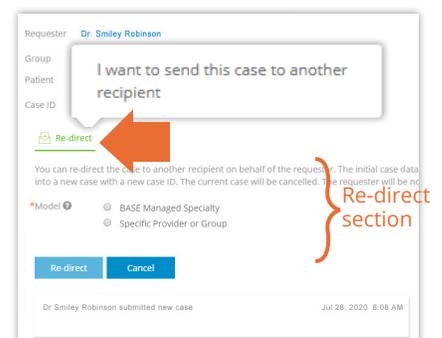


Figure 9: Case details with ‘re-direct’ fields

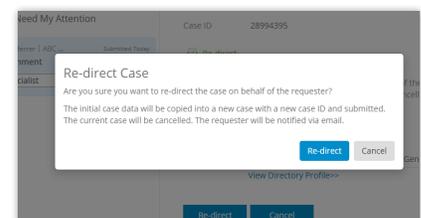


Figure 10: Re-direct confirmation pop-up

* The email recipient might have turned off their eConsult email notifications.