eConsult makes it easy for the specialist and the requesting provider to exchange information, ask questions and provide answers.

While a case is active, both the requesting provider and the specialist can:

- View the case
- Exchange information (request more info, provide more info, request clarification, or add a note)
- Add attachments

Access to a case becomes limited (*e.g.*, read only) after the requesting provider completes⧉ the case or cancels⧉ the case.

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 OTNhub eConsult service.**

   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.  Use the primary filters in the left navigation panel and the secondary filters at the top of the **Case List** to create a list where you can locate the desired case. (See Viewing the Case Details on page 2.)

   When you select a case, the Case Details appear in the right-most panel of the eConsult dashboard.
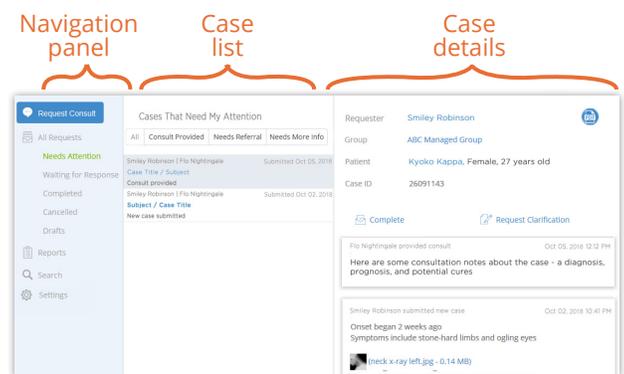


**Figure 1:**  eConsult dashboard with case details

**For technical issues, contact OTN Technical Support at 1-855-654-0888**  or  **techsupport@otn.ca**

**For Ontario eConsult Program information, contact eConsultCOE@toh.ca**

## Viewing the Case Details

1. To filter the Case List, click on a primary filter in the left navigation panel.

| Requester primary filters | Specialist primary filters |
|---|---|
| Requests<br>  • Needs Attention<br>  • Waiting for Response<br>  • Completed<br>  • Cancelled<br>  • Drafts | Consults<br>  • Needs Attention<br>  • Waiting for More Info<br>  • Consult Provided<br>  • Consult Returned<br>Requests<br>  • Needs Attention<br>  • Waiting for Response<br>  • Completed<br>  • Cancelled<br>  • Drafts |

2. Depending on the primary filter, you can fine tune the list using the status filter tabs at the top of the Case List.

| Requester secondary filters | Specialist secondary filters |
|---|---|
| Needs Attention<br>  • Consult Provided<br>  • Needs Referral<br>  • Needs More Info | Needs Attention<br>  • New<br>  • Follow Ups<br>Consult Provided<br>  • With Feedback<br>  • Flagged |

3. Locate the desired request/consult in the **Case List** and click its entry in the list to display the case details.

   Case details appear in the right-hand panel.

4. Review the case details.

   • To show/hide more information about the **Requester**, **Specialist**, or **Group**, click the name.

   • To show/hide the patient information entered when the case was created, click the **Patient name**.

   • The **Case ID** is a unique system-generated number.

   • Which action buttons appear depend on the case status (new, complete, etc.) and your role (*e.g.*, requester, assigner, or specialist).

   • **Case notes** appear in reverse chronological order (most recent at the top) and each note includes the name of the person who created the note, a date and time stamp and any files attached with that note.

   • If the requesting provider's office uses an **Electronic Medical Record (EMR)** system that communicates with eConsult, when the requesting provider (or their delegate) views the case details, the EMR name appears and they can view any associated tags by clicking the EMR name.
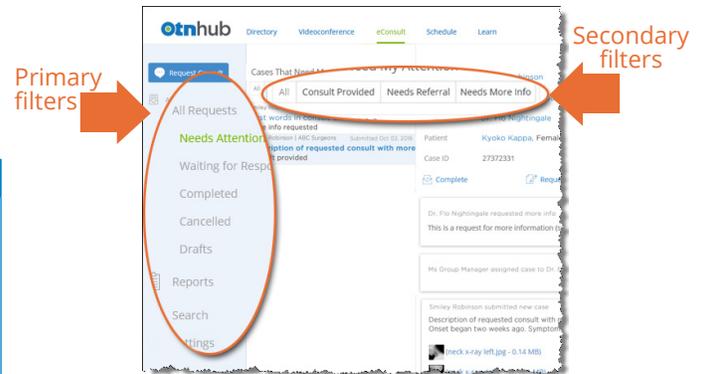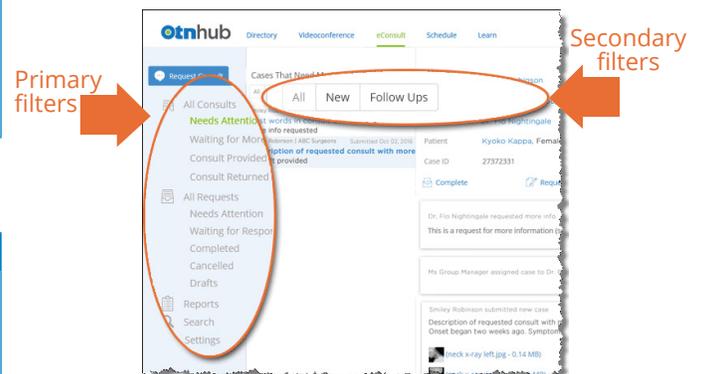


Primary filters · Secondary filters

**Figure 2:** Requesting provider case filters



Primary filters · Secondary filters

**Figure 5:** Specialist case filters



Action buttons · Case notes
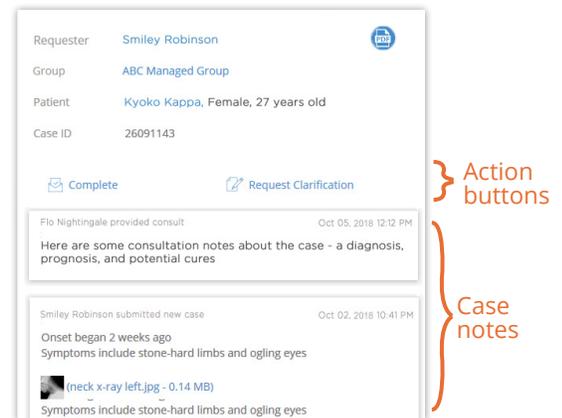
**Figure 3:** Case details - as seen by specialist or requester without EMR system



EMR name and associated tags

**Figure 4:** Case details - as seen by requester (or their delegate) with EMR system

# Exchanging Information (asking questions, providing answers, etc.)

You can exchange information, files, questions, images, etc., throughout the consultation process by using various actions (for example, **Request More Info**, **Provide More Info, Add Note** or **Request Clarification**).

For example, a requesting provider might request clarification after receiving the specialist's consult because they want to discuss the situation again (such as when a patient's condition worsens despite the suggested treatment).

Which action buttons appear depend on the case status (new, complete, etc.) and your role (requester or specialist).

- The requesting provider might see a 'Request Clarification' or 'Provide More Info' action button.

- The consultant might see a 'Request More Info' or a 'Reply' action button.

- Both roles can see an 'Add Note' action button.

1. To initiate an action, click the appropriate link in the **Case Details** (for example, 📋 Request More Info, or 📝 Add Note or 📝 Provide More Info or 📝 Request Clarification).

   - A new section appears where you can type in notes and attach files. (Note: there is a maximum limit of 4,000 characters in the notes field. If you have longer notes, use the attachment feature.)

   - As you add notes and attach files, eConsult saves a draft of your note, so you can navigate elsewhere within eConsult and then complete the note later.

2. If you change your mind and do not want to respond at this time, highlight everything in the notes field and delete it.

   - From the note creator's view, the status continues to show as "Draft note".

   - However, the fields remain blank and the other party involved will not see the draft status.

3. After you have completed your note with all relevant comments and files, click  Send .

   If you are a requesting provider, there is nothing more to do.

   If you are a specialist, a **KPI Feedback** dialog box appears. This information is used for reporting purposes - both for OTN and the Ministry of Health and Long Term Care. It does not appear in the case notes. These comments are for reporting purposes only and do not appear in the case notes. Complete the **Time Spent** field* and click  OK .

   When you send your note, eConsult does the following:

   - Saves the case.

   - Briefly displays a success message.



**Figure 6:** Case details with add notes section



**Figure 7:** Specialist feedback dialog before selecting time
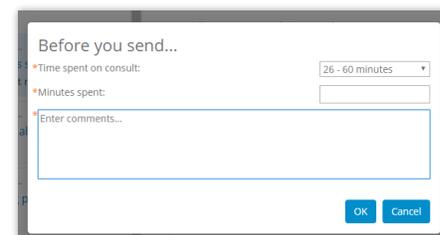


**Figure 8:** Specialist feedback dialog after 26+ minutes selected

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\* If you spent more than 25 minutes, a Minutes spent and an Enter comments... field appear. These are both mandatory fields. The time spent must be between 26 -60 minutes.
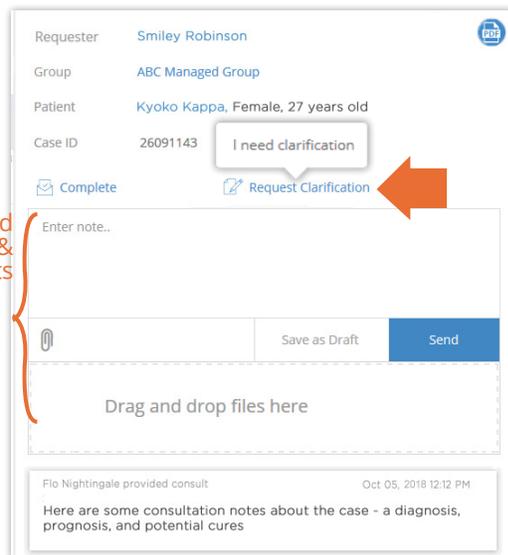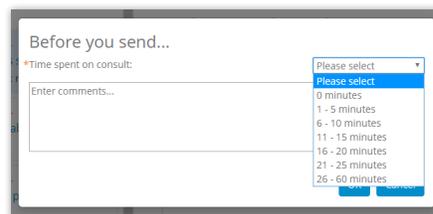
## Attaching Files

You can attach multiple files to your case. For each attachment you should include a brief but meaningful description. Ensure that the recipient has the right software for viewing the attached files.

**Notes:** (1) The attachment must be a valid file type. eConsult does not accept 'unsafe' file types such as .exe, .vbs, .tmp, etc.
(2) Maximum file size is 500 MB.
(3) There is no space/storage limit per user or per case.

If you have image files or other report files to include with your case/consult notes, do either of the following:

- Click the paperclip link ( ) at the bottom of the 'Enter notes' area, navigate to the file location and select the desired file.

  Or

- Using Windows Explorer (or Mac Finder), navigate to the file location, select the file and drag and drop the desired files into the dashed-line square under the 'Enter notes' area.

For each file attached, eConsult checks that it is a valid file type, is within size limits and performs a virus scan. (A progress bar appears as these steps are completed.

1. For each attached file, click in the text field just below the file name and enter a short but meaningful description.

2. To remove a listed file, click the **X** at the far right of the designated file. (For example, if after selecting a file, you realize you made a mistake and want to select a different file.)

   The list of attached files refreshes and reappears without the selected file and a success message briefly appears.

eConsult automatically saves a draft of the case as you add file attachments.
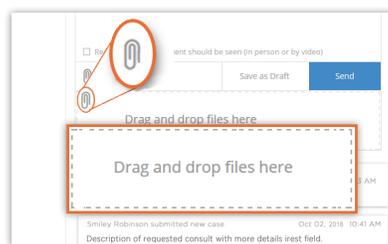


**Figure 9:** Two methods to attach files



Add a description

Remove attachment

**Figure 10:** Attach file dialog box

## Valid File Types

| File Extension | Description |
| --- | --- |
| 3GPP, 3GPP2 | Third Generation Partnership Project Multimedia |
| AVI | Video |
| BMP | Image |
| DCM | DICOM |
| DOC, DOCX | MS Word Document |
| EXIF | Exchangable Image |
| FLV | Video |
| GIF | Image |
| JPG, JPEG, JFIF | Image |
| M4A | Audio |
| MKV | Video |
| MOV | Video |
| MP3 | Audio |
| MP4 | Video |
| MPG/MPEG | Video |
| OGG | Audio |
| PDF | PDF |
| PNG | Image |
| PPT, PPTX, PPS, PPSX | PowerPoint |
| QT | Video |
| RAW | Image |
| RTF | Rich Text |
| SIA | medX Health file type for magnified view of files |
| TIFF | Image |
| TXT | Text Document |
| WAV | Audio |
| WKS, WK1, WK2, WK3, WK4 | Lotus 1-2-3 |
| WMA | Audio |
| WMV | Video |
| WPD, WP, WP4, WP5, WP6, WP7 | Word Perfect |
| XLS, XLSX, CSV | Excel Document |
| XPS | Open XML Paper |