eConsult: Completing or Cancelling a Case

The requesting provider can complete a case only after the designated specialist has reviewed the information in the case, provided their response and provided the consult. By providing the consult, the specialist lets the requesting provider know that they have finished their involvement.

Up until the specialist has provided their consult, a requesting provider can cancel the case.

For cases submitted to a group/program or BASE Managed Specialty Group, only a 'Department Assigner' or 'Triage Assigner' can cancel cases that have not yet been assigned to a specialist.

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Cases Pending Completion

After the specialist has provided their consult, if you view the case and try to navigate away without taking any action, eConsult will remind you that the case is still open.

1. If you want to complete the case, click Complete.

   eConsult returns you to the case details panel with the complete case fields in view.

2. If you do not want to complete the case and will come back to it later, click Cancel.

   eConsult takes you where you want to go.

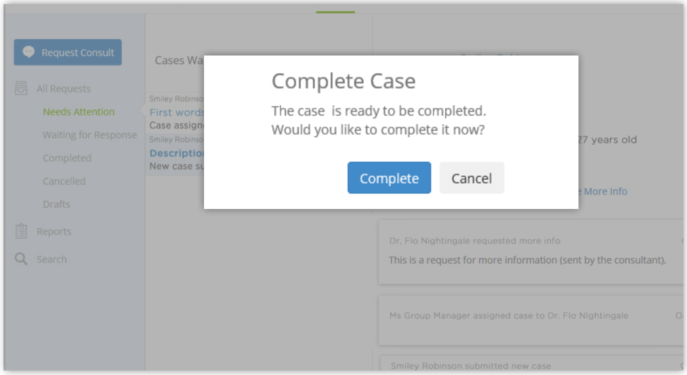

Figure 1: Open case with 'completion' message

Completing a Case

The requesting provider usually *completes* a case after they have received a satisfactory response from the specialist and the specialist has completed their involvement.

When a case status is completed, no one can edit it.
All parties involved in the case can view it.

1. Locate and view the Case Details for the desired case.
2. To initiate the closing, click Complete in the Case Details panel.

   A **Complete Case** section appears.
3. In the **Provide feedback to specialist...** field, type a few comments describing your thoughts about the consult.

   These comments become a part of the case notes and all parties involved in the case can view them.
4. To submit the completion, click Complete.

   A **KPI[1] 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.
5. Review the questions and for each question select the option that best matches your experience.
6. If you have additional comments you would like to make about the eConsult experience, type them in the open text field in the last question.

   These comments are for reporting purposes only and do not appear in the case notes.
7. To finalize the case closing, click OK.

   When you close a case, eConsult does the following:
   - Saves the case and sets the status to 'Case completed'.
   - Briefly displays a success message.

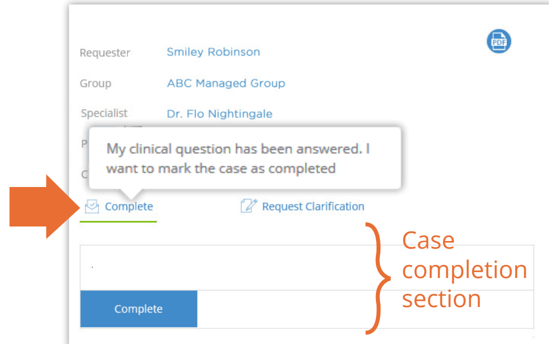

Figure 2: Case details with 'complete case' fields

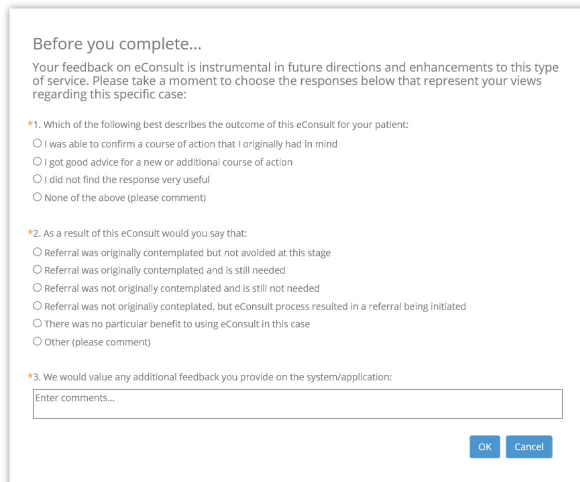

Figure 3: Feedback dialog box

1 Key Performance Indicator

Cancelling a Case

For cases submitted to a **specific provider**:

- Only the requesting provider can cancel a case.
- The requesting provider **can** cancel a case if the specialist has not yet provided their consult.
- The requesting provider **cannot** cancel a case if the specialist has already provided their consult or the case is completed.

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 if the specialist has declined the consult and returned the case for re-assignment.

When a case status is 'cancelled', no one can edit it.
All parties involved in the case can view it.

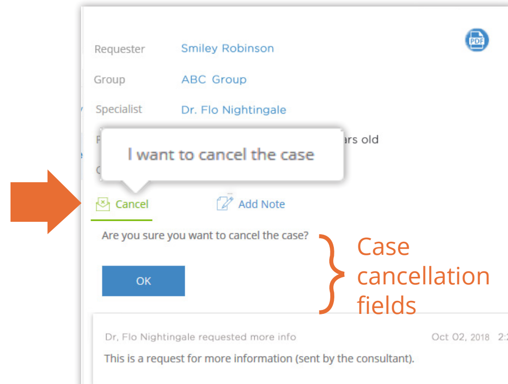

Figure 4: Case details with cancellation fields

1. 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?**

2. 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).