eConsult: Providing or Returning a Consult (by Specialist)

When a requesting provider sends a consult request to a specific specialist, or an assigner assigns a case to a specialist in their group, the case appears in the target specialist's eConsult dashboard. Requests from a requesting provider appear with a status of 'New case submitted'; Requests from a group assigner appear with a status of 'Case assigned'.

The target specialist also receives an email notifying them about the case (unless they have turned off their eConsult email notifications).

The specialist can review the case details and decide whether to provide the consult (accept and complete it) or request more information or return the consult.

After a specialist has reviewed the case, provided their consult and sent it, eConsult updates the consult status to 'consult provided'.

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. To filter the **Case List** for only newly assigned cases, click New at the top of the Case List panel.

iii. Look for a case with the status "*Case assigned*" or "*New case submitted*" and to view the case details, click the case list item.

Case details appear in the right-most panel of the eConsult dashboard. Review the case details and decide whether you will:

- Provide (complete) the consult,
- Request more information, or
- Return the consult.

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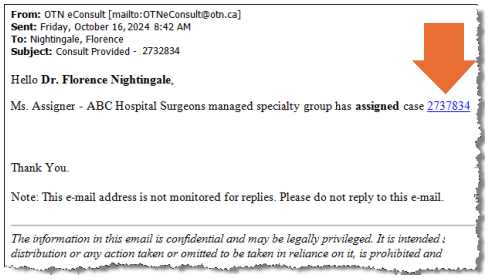

From: OTN eConsult [mailto:OTNeConsult@otn.ca]
Sent: Friday, October 16, 2024 8:42 AM
To: Nightingale, Florence
Subject: Consult Provided - 2732834

Hello **Dr. Florence Nightingale**,

Ms. Assigner - ABC Hospital Surgeons managed specialty group has **assigned** case 2737834

Thank You.

Note: This e-mail address is not monitored for replies. Please do not reply to this e-mail.

The information in this email is confidential and may be legally privileged. It is intended s distribution or any action taken or omitted to be taken in reliance on it, is prohibited and

Figure 1: eConsult email

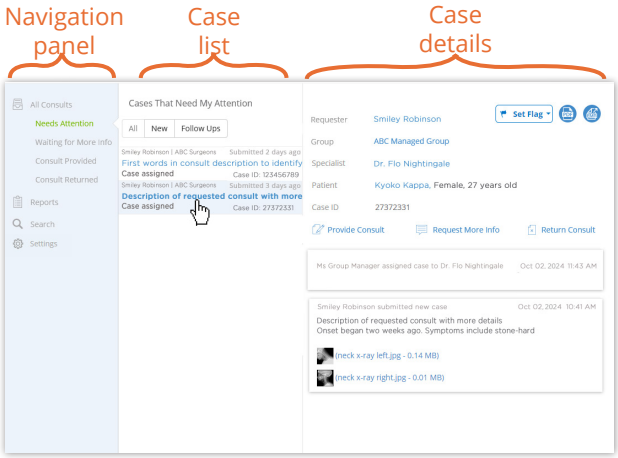

Figure 2: eConsult dashboard

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

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

Providing a Consult

When the specialist provides their consult, it also ends their involvement with the case. Providing their consult implies that they are satisfied with the advice and information they have added to the case (*e.g.*, notes and/or attachments about their diagnosis and recommended treatment) and are ready to return the consult to the requesting provider.

> Completed consults are saved for only a limited time.
>
> Please print/export the data for your clinical records, if needed.

After you submit the consult, you can add a note if the requesting provider has not yet completed the case.

Note: You must provide some treatment notes or attachments before you can 'send' a consult.

1. If you want to flag the case as a specific type, click Set flag and select a item from the drop-down list.
   - Cases can be flagged as Education, Research, or other. In future, you can use this flag to filter searches.

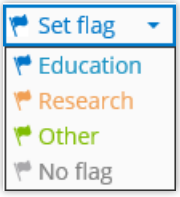

Figure 3: Set flag drop-down list

2. To initiate the consult, click Provide Consult in the Case Details.
   - A new section appears where you can type notes and attach files.
   - To indicate that the patient should be seen in person or via video, select the ☐ **Recommendation** check box.
   - As you add notes and attach files, eConsult saves a draft of your consult, enabling you to navigate elsewhere within eConsult and then complete the consult later.

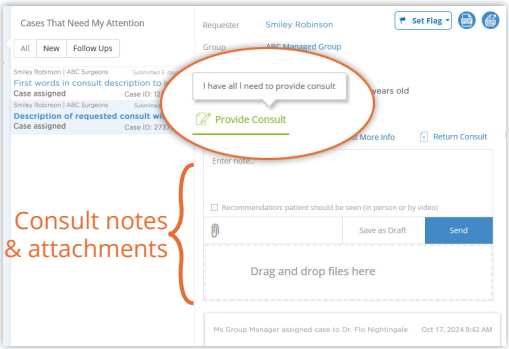

Figure 4: Case details with consult notes field

3. After you have completed all the required fields and added all relevant notes and files, click Send.

   A **Key Performance Indicator** (KPI) **Feedback** dialog box appears. This information does not appear in the case notes—it is used for reporting purposes by Ontario Health (OTN), the eConsult Centre of Excellence (CoE)*, and the Ontario Ministry of Health.

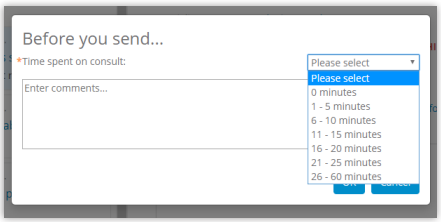

Figure 5: Feedback dialog before selecting time

4. To provide the amount of time you spent on the consult, click the **Time spent** drop-down arrow and select a time period.

   If you spent 26 or more minutes, a **Minutes spent** and an **Enter comments...** field appear. These are both mandatory fields.

5. If you have comments about the eConsult experience (not about the case), type them in the **Enter comment...** field.

   These comments are for reporting purposes only and do not appear in the case notes.

6. If you change your mind and don't want to complete the consult at this time, to close the dialog box and return to the consult details, click Cancel

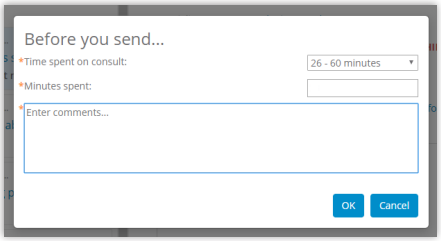

Figure 6: Feedback dialog after 26-60 minutes selected

7. To finalize the consult's completion, click OK.

   When you complete a consult, eConsult does the following:
   - Saves the consult and sets the status to 'Consult Provided'.
   - The case details become 'read only'.
   - Sends an email** notification to the requesting provider.

8. If Health Report Manager (HRM®) is in use and the case meets HRM requirements:
   - If you have previously selected **Export to EMR** for this case, eConsult exports a PDF of the case details to HRM.
   - If you have not previously selected this case for export, to export a PDF of the case details to HRM, click **Export to EMR**.

* For more information about CoE, see their eConsult Specialist Quick Guide.

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

Requesting More Info

If, after reading the case notes you need additional details or have questions, use the **Request More Info** feature.

1. To initiate the request, click Request More Info in the Case Details panel.
   - 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 request, enabling you to navigate elsewhere within eConsult and then complete the request later.
2. After you have completed your request with all relevant notes and files, click Send.

   A **KPI*** **Feedback** dialog box appears. This information does not appear in the case notes—it is used for reporting purposes by Ontario Health (OTN), the eConsult Centre of Excellence (CoE)**, and the Ministry of Health and Long Term Care.
3. To provide the amount of time you spent on the consult, click the **Time spent** drop-down arrow and select a time period.

   If you spent 26 or more minutes, a **Minutes spent** and an **Enter comments...** field appear. These are both mandatory fields.
4. If you have comments about the eConsult experience (not about the case), type them in the **Enter comment...** field.

   These comments are only for reporting purposes and do not appear in the case notes.
5. If you change your mind and don't want to complete the consult at this time, to close the dialog box and return to the consult details, click Cancel
6. To finalize sending your request, click OK.

   When you send your request, eConsult does the following:
   - Saves the case and sets the status to 'More info requested'.
   - Briefly displays a success message.
   - Returns you to the eConsult dashboard.
   - Sends an email notification*** to the requesting provider.
   - The case details with your request notes become 'read only' but all action buttons are still available.

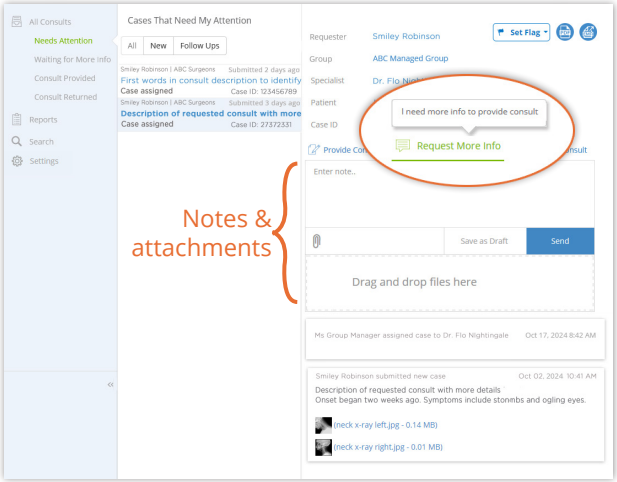

Figure 7: Case details with request more info fields

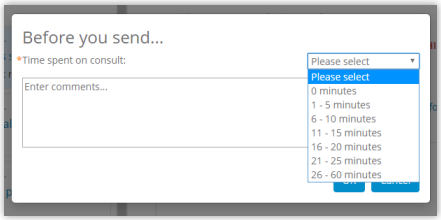

Figure 8: Feedback dialog before selecting time

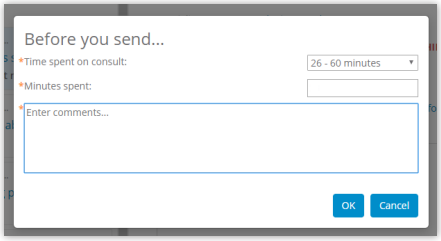

Figure 9: Feedback dialog after 26-60 minutes selected

* Key Performance Indicator

** For more information about CoE, see their eConsult Specialist Quick Guide.

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

Returning a Consult

If after reading the case notes, you decide that you cannot offer a consultation, use the **Return Consult** feature.

1. To initiate the process, click Return Consult in the Case Details panel.

   A new section appears where you can select a reason for the return and provide additional comments.

2. To identify the reason why you cannot accept the case, select the appropriate checkbox.

   If none of the pre-defined reasons is appropriate, select **Other** and type a brief explanation in the **Comments** field. Do not include PHI.

3. After you have selected a reason and added relevant notes, click Return.

4. If the reason is "**Not available**" there is no KPI dialog box, skip to step #5.

   If the reason is "**Incorrect specialist**" or "**Other**" a **KPI*** **Feedback** dialog box appears.

   - This information does not appear in the case notes. Ontario Health and the eConsult Centre of Excellence (CoE)** use it for reporting purposes.
   - To provide the amount of time you spent on the consult, click the **Time spent** drop-down arrow and select a time period.
   - If you spent 26 or more minutes, a **Minutes spent** and an **Enter comments...** field appear. These are both mandatory fields.
   - If you have comments about the eConsult experience (not about the case), type them in the **Enter comment...** field.

5. If you change your mind and don't want to complete the consult at this time, to close the dialog box and return to the consult details, click Cancel.

6. To finalize the return, click OK.

   When you return the case, eConsult does the following:

   - Saves the case and changes the status to "*Needs Attention*".
   - Briefly displays a success message.
   - Returns you to the eConsult dashboard.
   - For you (the specialist), the case becomes 'read only'.
   - If the eConsult case came **directly to you** (the specialist), the case returns to the requesting provider.
   - If the eConsult case was **assigned from a group assigner** and:
     - » If you (the specialist) have **actioned** the case (for example, added a note, requested more information, or provided a consult), the case returns to the **requesting provider**.
     - » If you (the specialist) have **not actioned** the case:
       - If the return reason = "*not available*", the case returns to the **assigner**.
       - If the return reason = "*incorrect specialty*" or "*other*", the case returns to the **requesting provider**.

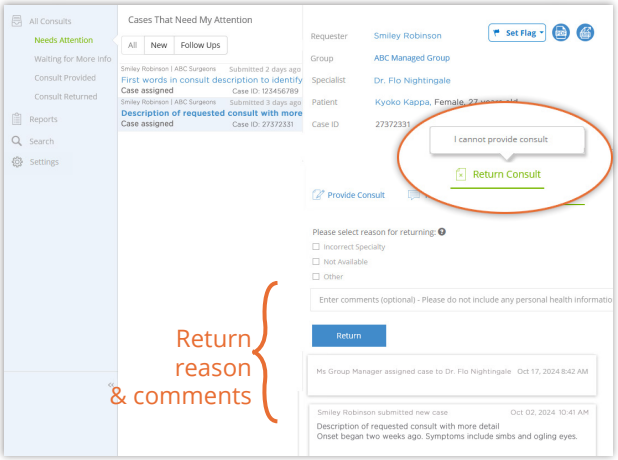

Figure 10: Case details with return case fields

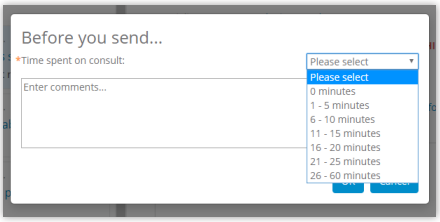

Figure 11: KPI Feedback dialog before selecting time

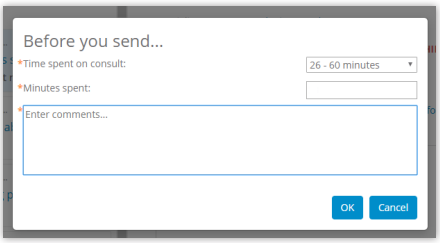

Figure 12: KPI Feedback dialog after 26-60 minutes selected

* Key Performance Indicator
** For more information about CoE, see eConsult Specialist Quick Guide.

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 appropriate viewers for 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. For a standard list of unsafe types, refer to the Microsoft Office Outlook support web site.
(2) Maximum file size is 500 MB.
(3) There is no space/storage limit per user or per case.

File attachments with a comma in the name will not open in Google Chrome. For example, eye,xray.pdf

1. If you have image files or other report files to include with the case notes, do either of the following:
   - Click the paperclip link at the bottom of the Case Details panel, 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 file into the dashed-line square.

   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.)

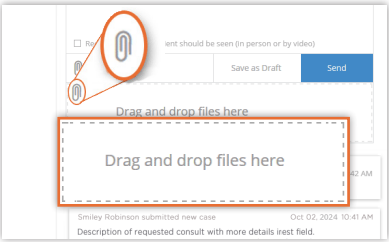

Figure 13: Two methods to attach files

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

3. 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.

Figure 14: List of attached files

eConsult automatically saves a draft of your consult as you add file attachments.

Valid File Types

Note: File attachments with a comma in the name will not open in Google Chrome.

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