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, the requesting provider, a 'Department Assigner' or 'Triage Assigner' can cancel cases that have not yet been assigned to a specialist.

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TIP: When you have completed a case, retain and securely copy or transfer any PHI or other information exchanged through the program into your own records to meet any record-keeping obligations.

For example, the requesting provider or their delegate should "export" the case (and download any required attachments) and keep this record in paper or electronic format in the primary care provider's patient file.

See Printing and Exporting a Case

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 leaves the case in your "Needs Attention" folder and opens the linked location that you clicked in the navigation panel.

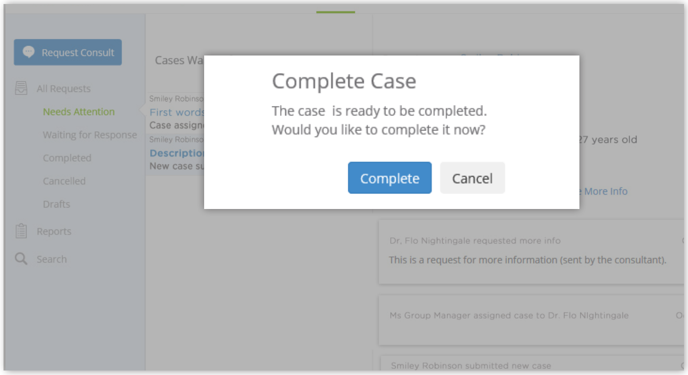

Figure 1: Open case with 'completion' message

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

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.

When you have completed a case, **retain and securely copy or transfer any PHI** or other information exchanged through the program into your own records to meet any record-keeping obligations.

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 the 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.
   - If you add a comment, eConsult will send a “Feedback Provided” email to the specialist when you click “Complete”. (No email is sent when you complete a case without a comment.)
4. In the **Provide feedback to eConsult support team** field, if desired, type a few comments about the eConsult experience and select the appropriate consent check boxes.
   - 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.
   - Do not do not include any PHI or information that would identify a patient in your comments.

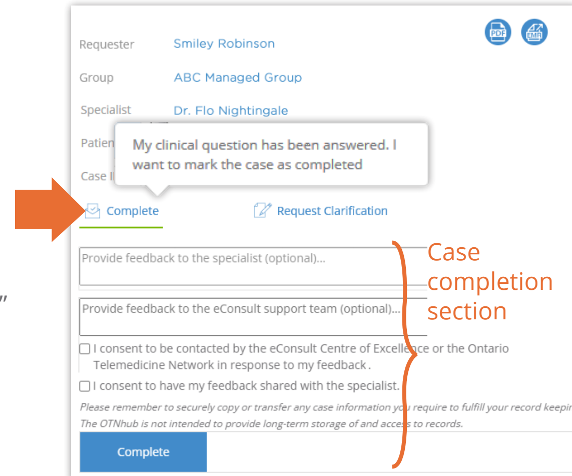

Figure 2: Case details with ‘complete case’ fields

5. To submit the completion, click Complete.

   When you close a case, eConsult does the following:
   - Saves the case and sets the status to ‘Case completed’.
   - Briefly displays a success message.
   - Sends an email to the specialist if you included a comment when completing the case.
6. If Health Report Manager (HRM®) is in use and the case meets HRM requirements:
   - If you have Automatic update to EMR turned on in your **eConsult settings**, eConsult automatically exports a PDF of the case details to HRM.
   - If you do not have “Automatic update to EMR” turned on:
     - » 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**.

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**:

- The requesting provider or 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.

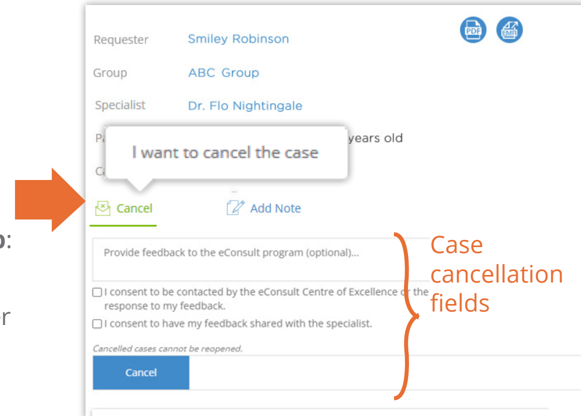

Figure 3: Case details with cancellation fields

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

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

   A new section appears with feedback fields and a Cancel button.

2. In the **Provide feedback to eConsult support team** field, if desired, type a few comments about the eConsult experience and select the appropriate consent check boxes.
   - 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.
   - Do not do not include any PHI or information that would identify a patient in your comments.

3. To confirm the cancellation, click Cancel.

   When you cancel a case, eConsult does the following:
   - Saves the case and sets the status to 'Cancelled'.
   - Briefly displays a success message.
   - If the case was cancelled by an assigner, sends an email notification to the requesting provider (and their delegates).

4. 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 automatically 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**.