Setting eConsult Service Options

Accessing Service Settings

1. Sign in at otnhub.ca, click the **Profile** link in the top right banner and select **Service Settings** in the panel.
2. To view eConsult settings, click **eConsult** in the left navigation panel.

   An eConsult Settings screen appears with a few options.

   - General Settings
     - Availability (specialist only)
     - Maximum Cases (specialist only)
     - Priority Regions
     - Export to EMR
     - EMR access (specialist only)
   - Notifications
   - Delegations

If you want to opt out of accepting eConsult cases, you need to update your OTNhub Directory Profile.

See Updating an OTNhub Directory Person Profile (refer to field descriptions in the "eConsult Advice" section.)

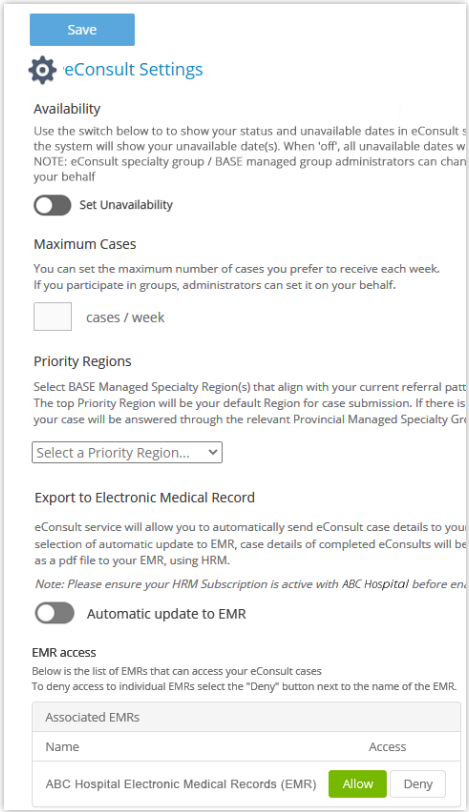

Figure 3: eConsult general settings

Table of Contents

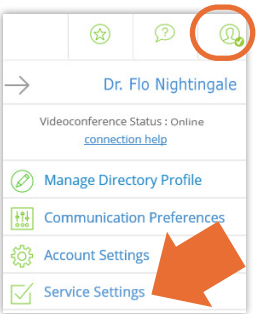

Figure 1: User panel menu

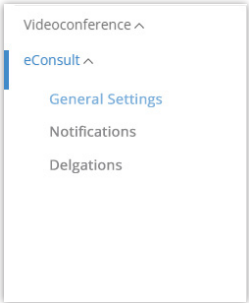

Figure 2: eConsult settings

Setting Availability Option

This setting is available only to Specialists.

NOTE: If you are part of a group/program, this setting can also be changed by the Administrator.

If you are going to be unavailable for a period of time, you can set notifications for one or more date ranges.

During the unavailable period, the specialist's name within search results appears in a grey colour along with the return date. During this time, the specialist cannot be sent an eConsult request.

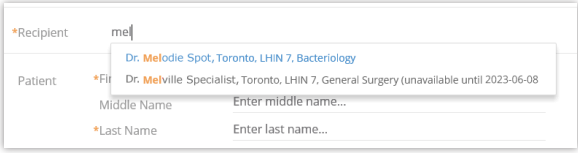

Figure 4: Specialist "unavailable" notification

1. To access the calendar options, click the **Set Unavailability** button to on.

   Start Date and **End Date** fields appear.

2. To identify a **Start date**, type a date using the format yyyy-mm-dd or use the calendar widget to select a date.

   To use the calendar widget, click beside a date field and then:

   - To select a day, click the date.
   - To change the month displayed,
     - To move forward or backward one month at a time, click the arrows beside the month name – previous or next .
     - To view a drop-down list of all months in the year, click the month name.
   - To change the year displayed, click the month name and then click the year in the title bar.
   - To reset the calendar widget to the current date, refresh your browser (Ctrl+F5).

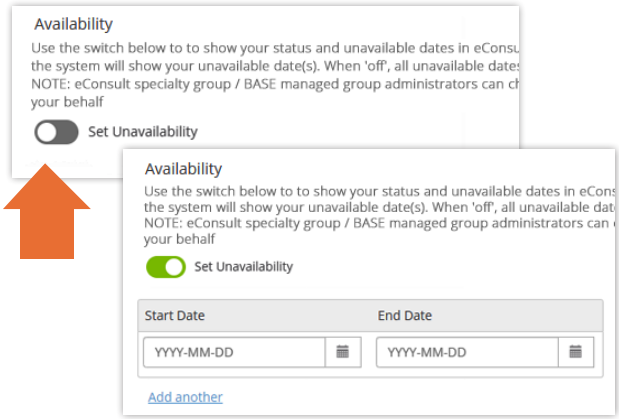

Figure 5: Availability options

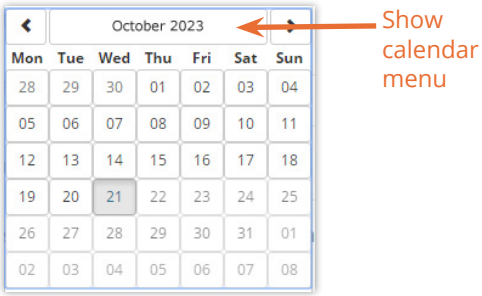

Figure 6: Calendar widget

3. To identify an **End date**, type a date using the format yyyy-mm-dd or use the calendar widget to select a date.

4. To add additional unavailable dates, click the **Add another** link under the date table.

5. To remove a row:
   - When there is more than one row in the table, to remove a specific row, click to the right of that row.
   - When there is only one row, click the **Set Unavailability** button to off.

6. If you change your mind, you can cancel at any time.

   To cancel any edits you have made in the settings, simply go to any other page in OTNhub and the changes will not be saved.

7. To submit the new settings, click Save.

   If all is okay, the **Settings** screen reloads and a success message appears.

   If there is an error, an error message appears. Correct the error and try again.

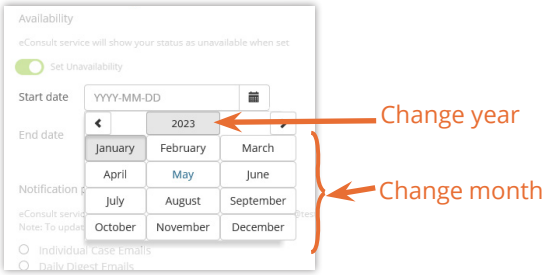

Figure 7: Calendar menu

Setting Maximum Cases Option

This setting is available only to Specialists.

NOTE: If you are part of a group/program, this setting can also be changed by the Administrator.

Use this field if a specialist will accept only a limited number of eConsult cases within a week. A week being defined as a seven-day rolling count.

eConsult calculates the specialist's case load for the seven days ending at the time of case *assignment* (not the date the request was received). For example:

- eConsult case received 09:00 a.m. Friday June 7.
- Assigner reviews the case 09:00 a.m. Saturday June 8.
- Therefore, case load is based on the number of cases that were received between Sunday June 2, 12:00 a.m. and Saturday June 8, 09:00 a.m.

1. To set the **Maximum Cases**, type a number in the cases / week field.
2. If you change your mind, you can cancel at any time.

   To cancel any edits you have made in the settings, simply go to any other page in OTNhub and the changes will not be saved.
3. To submit the new settings, click Save.

   If all is okay, the **Settings** screen reloads and a success message appears.

   If there is an error, an error message appears. Correct the error and try again.

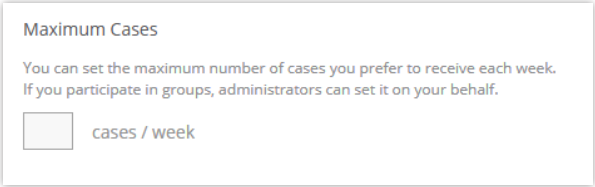

Figure 8: Maximum cases option

Setting Priority Regions

Note: This setting is available only to requesting providers. Delegates of requesting providers cannot set the priority regions for their providers.

Priority Regions identify specific areas that offer BASE Managed Specialty Groups, where you can send an eConsult request to a group of specialists whose cases are managed by an assigner, thus increasing the odds of getting immediate access to specialty resources.

If you do not select a priority region, or if there is no specialty group in your chosen region(s), cases are answered through the relevant Provincial Managed Specialty Group.

1. To identify a Priority Region, click the **Select a Priority Region** drop-down arrow and click a name in the list.
   - The selected region appears below the selection field.
   - The first region selected is given a Priority of 1. Each additional region selected defaults with a sequence number one more than the previously selected region.
   - Each priority must be unique. That is, there can be only one priority 1, one priority 2, etc.
2. To change a selected region's priority, click its associated **Priority** drop-down arrow and select a number.
3. To delete a selected region, click its associated **Action** button.
4. If you change your mind, you can cancel at any time.

   To cancel any edits you have made in the settings, simply go to any other page in OTNhub and the changes will not be saved.
5. To submit the new settings, click Save.

   If all is okay, the **Settings** screen reloads and a success message appears.

   If there is an error, an error message appears. Correct the error and try again.

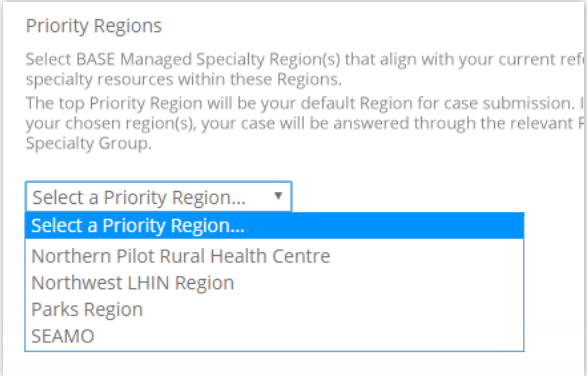

Figure 9: Priority Regions option - with drop-down list

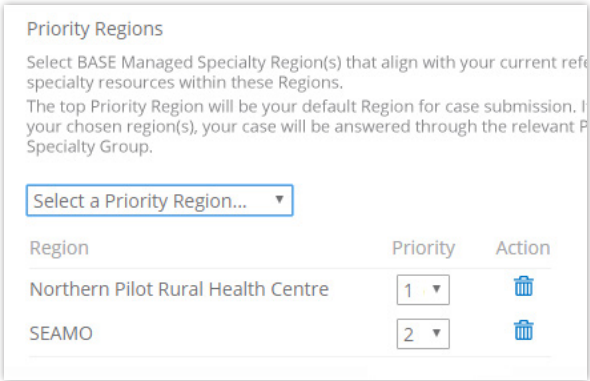

Figure 10: Priority Regions option - after selection

Setting EMR Export Preference

The Export to EMR feature enables eConsult requestors (physicians and nurse practitioners) and consultants (or their delegates) to export a PDF file of the case details for their EMR, using Health Report Manager (HRM®).

From HRM, the case details PDF can be attached to the patient's Electronic Medical Record (EMR).

When **Automatic update to EMR** is selected:

- *For new cases*, eConsult automatically exports to HRM only once, when the case is completed.
- *For existing cases*, for each case, you can click to set the case to automatically export to HRM for all case updates.

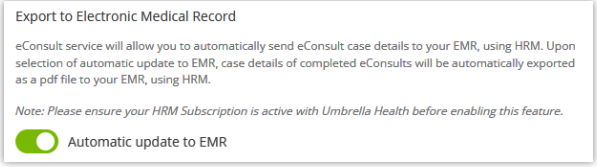

Figure 11: Electronic Medical Record (EMR) option

Notes: (1) HRM subscription is required for this feature and there are eConsult case requirements. For example, the patient OHIP number is required.

(2) Ensure your HRM subscription is active with your member organization before enabling this feature.

For information about HRM, see OntarioMD: About HRM.

Setting EMR Access

This section appears only to specialists who are associated with one or more Electronic Medical Record (EMR) systems that are set to communicate with eConsult.

This section lists all the EMRs that can access your eConsult cases. By default, access is allowed.

Only the specialist can change their EMR access. (That is, a delegate cannot change EMR access on behalf of a specialist.)

Denying Access to an EMR

1. To deny access to an EMR system, locate the EMR in the list and click Deny.

   The button turns orange-red (Deny).

2. To activate the change in access, click Save.
   - If access is changed, the **Settings** screen reloads, a success message appears, and you can access cases associated with this EMR only by using eConsult.
   - If there is an error, an error message appears. Correct the error and try again.

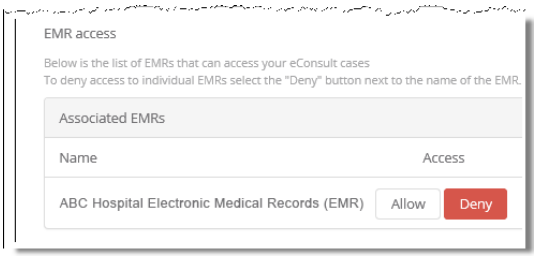

Figure 12: EMR access denied

Allowing Access to an EMR

1. To enable access to an EMR system, locate the EMR in the list and click Allow.

   The button turns green (Allow).

2. To activate the change in access, click Save.
   - If access is changed, the **Settings** screen reloads, a success message appears, and you can access cases associated with this EMR using eConsult or the EMR.
   - If there is an error, an error message appears. Correct the error and try again.

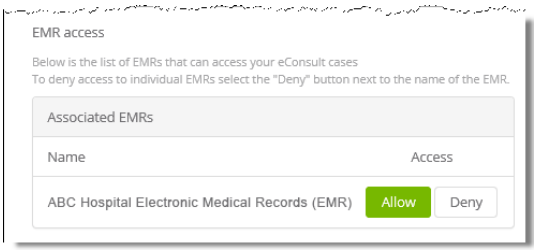

Figure 13: EMR access allowed

Setting Notification Preferences

The eConsult service will send an email notification to requesting providers, specialists, and their delegates when a case has been actioned or requires review.

To update your email address, use the Self Service feature, Account Settings > My Account.

Which **Individual Case Emails** you receive depends on your role. For example:

- Requesting providers receive an email each time a specialist provides a consult or requests more information.
- Specialists receive an email each time a requesting provider sends them a case.
- Delegates receive an email each time their requesting provider receives a response for a case.

The details in the **Daily Digest Emails** depend on your role. For example:

- Requesting providers receive a list of cases that need their attention and cases awaiting a response from the specialist.
- Specialists receive a list of cases that need their attention.
- Delegates receive a list of all cases associated with the specialist for whom they work.

If you select **Daily Digest Emails (Weekdays only)**.

- No daily digest emails will be sent between Friday 11:30 p.m. to Sunday 11:29 p.m.
- Statutory holidays are not included. For example, if there is a holiday Monday, emails will still be sent on the Sunday.

1. To view your notification settings, click **eConsult** in the left navigation panel and select **Notifications**.
2. By default, **Individual Case and Daily Digest Emails** is selected.
   - If you want to receive all eConsult emails, leave this selected.
   - If you want to receive only one type of email notification, select the desired option.
3. If you change your mind, you can cancel at any time.

   To cancel any edits you have made in the settings, go to any other page in OTNhub and the changes will not be saved.
4. To submit the new settings, click Save.

   If all is okay, the **Settings** screen reloads and a success message appears.

   If there is an error, an error message appears. Correct the error and try again.

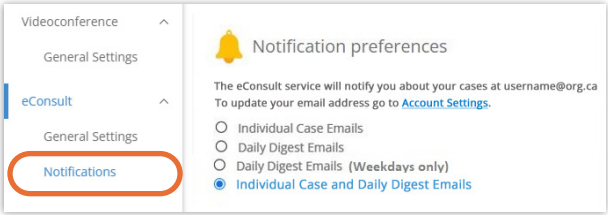

Figure 14: Notification options

Viewing Your Delegate Roster

A specialist or requesting provider can have one or more delegates associated with their eConsult account (*i.e.*, on their delegate roster).

Once assigned as a delegate, that person has the same dashboard view and can perform the same functions as the specialist or requesting provider who delegated them.

To add or remove a delegate, contact your organization's OTNhub Primary Contact for Service (PCS). (To find the name of your organization's PCS, see Identifying Your Organization's PCS.)

To view your delegations, click **eConsult** in the left navigation panel and select **Delegations**.

An eConsult Delegations screen appears that shows your **Delegate Roster**.

- **My Delegates** lists the people assigned as delegates for your eConsult account.
- **I am a Delegate for** lists the people for whom you are a delegate.

If a delegate or a person for whom you are a delegate have had their account *archived or login disabled*, their name appears grayed-out with an information tip.

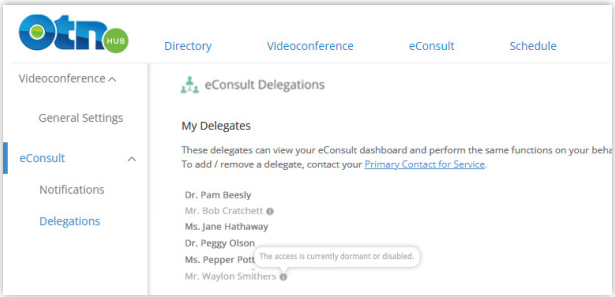

Figure 15: Delegate list

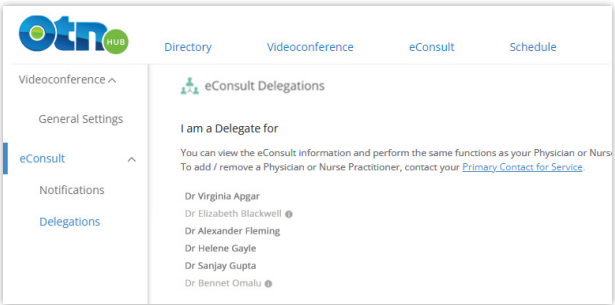

Figure 16: Delegator list