

# **eConsult Workflow Guide:**

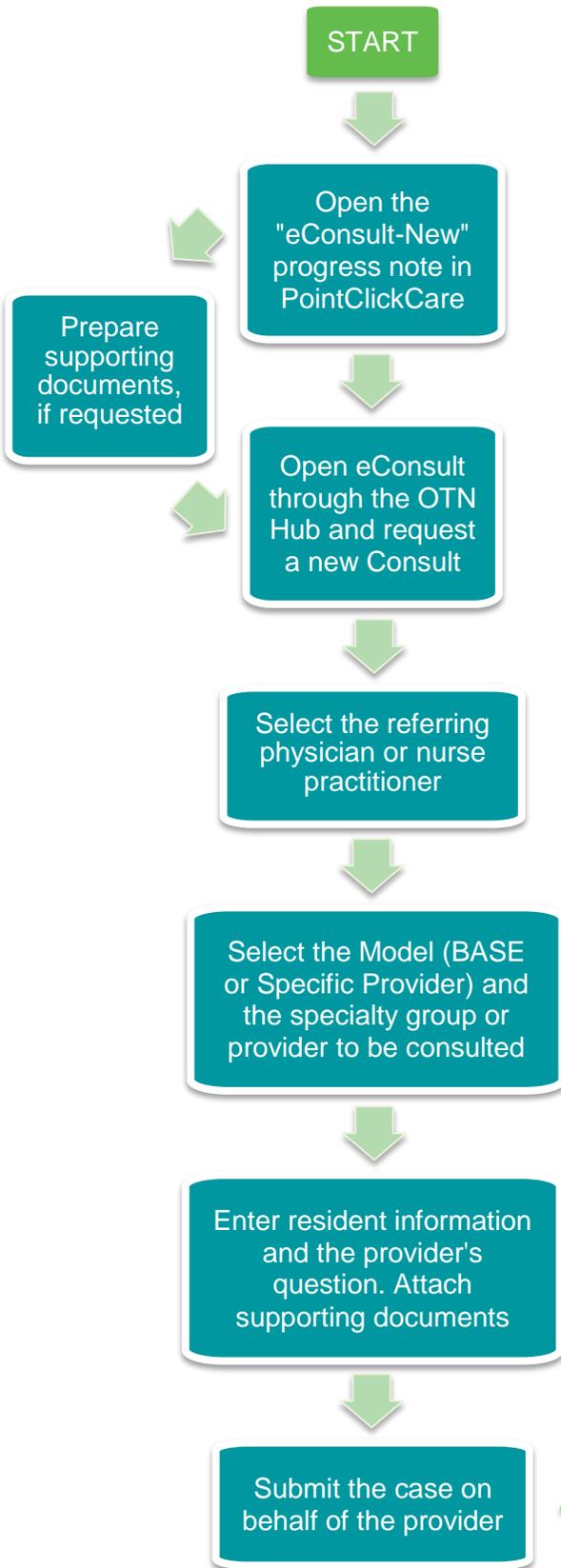
**Using a Delegate for eConsult**

**Submission with PointClickCare**

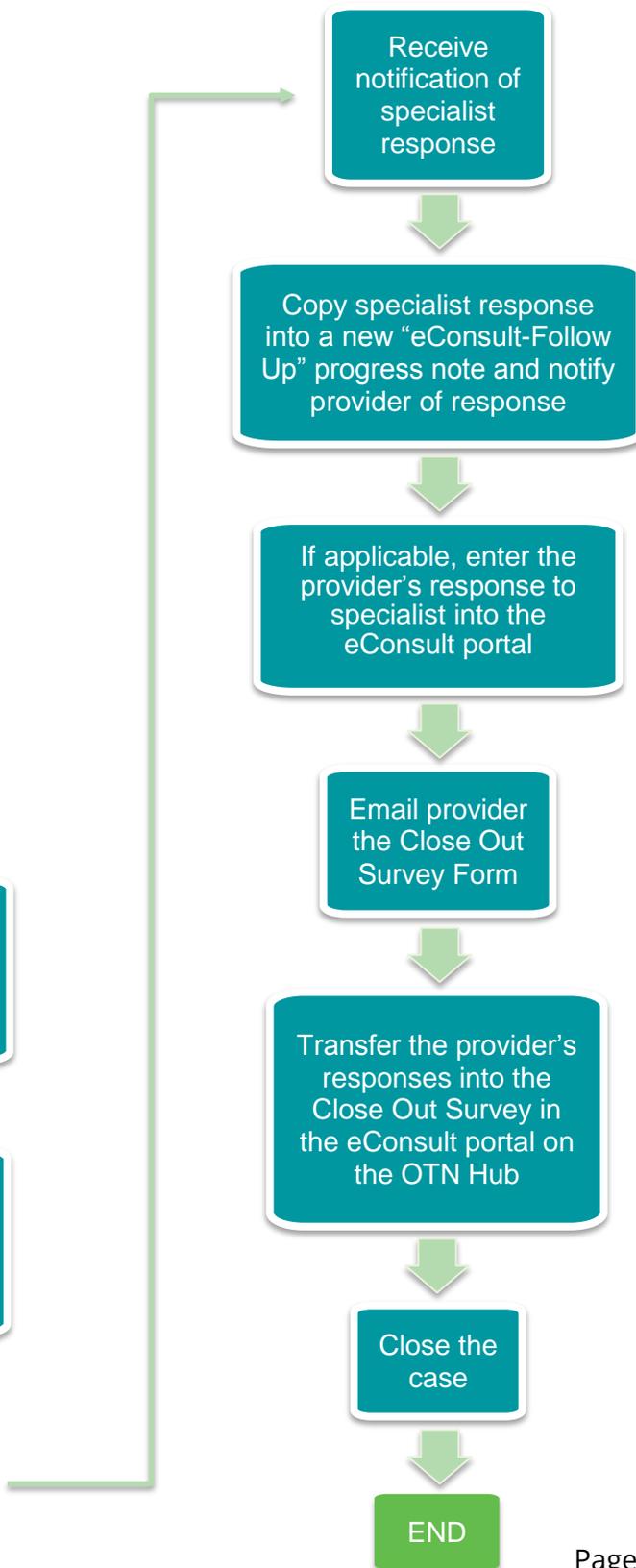
For Delegates of Providers in Long-Term Care

# Workflow Chart

## Create an eConsult Case



## Update Provider with Specialist Response and Close the Case



## Purpose of this Workflow Guide

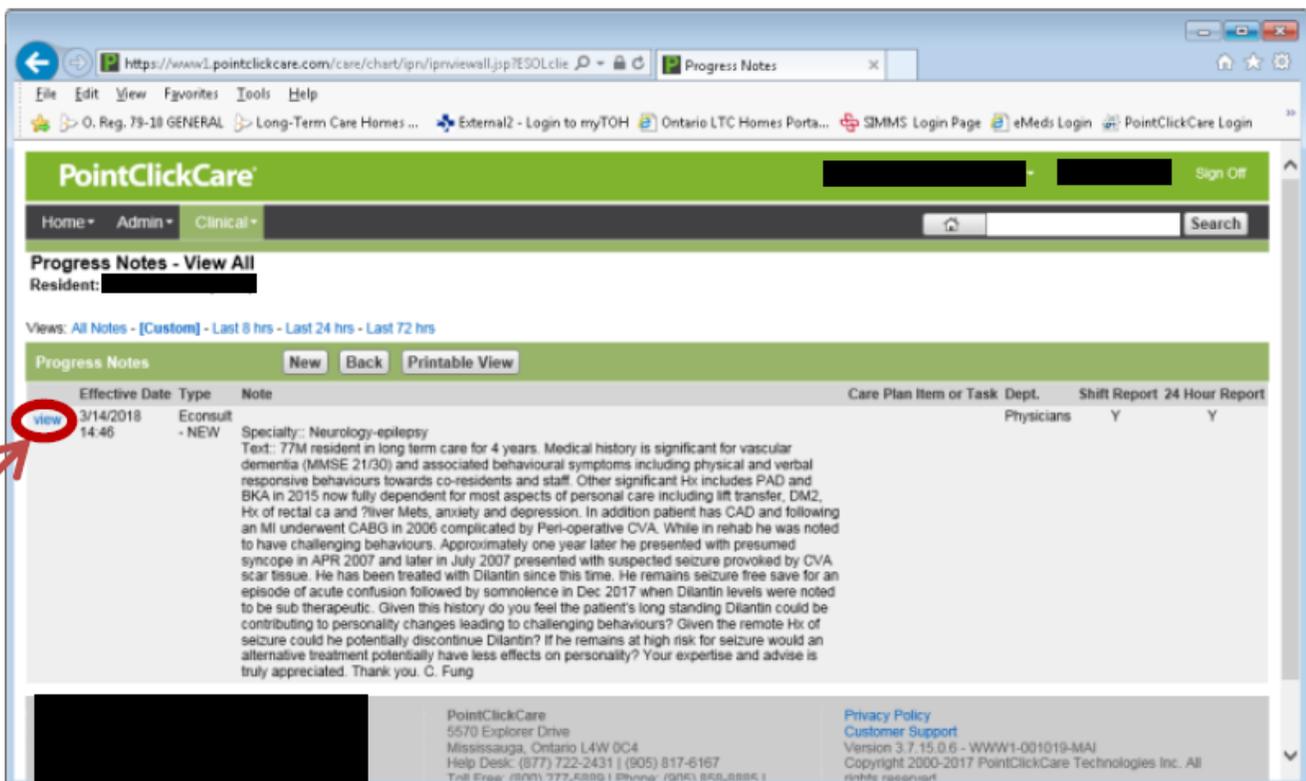
This guide describes the steps to be taken by a delegate using eConsult on behalf of a physician or nurse practitioner. This workflow is integrated with the PointClickCare (PCC) platform and allows the provider to submit a case without leaving PCC. It may be adapted to particular homes' existing workflows, systems, and EMR platforms.

## Submitting an eConsult Case

When a provider in your home decides to submit an eConsult case, you will be notified. It is recommended that the provider initiate the eConsult in a similar way to initiating an external referral. For purposes of this guide, the process is the following. The provider creates an order in the resident's paper chart and a progress note in the resident's electronic file requesting a new eConsult. The nursing staff will notify you of the eConsult request and any other instructions included with the order.

Two new progress note types will need to be created in PointClickCare to facilitate the below workflow. The first should be for new eConsults (ex. "eConsult - New") and the second for follow up content on an existing eConsult case, such as the response from the specialist or additional questions sent by the provider about the case (ex. "eConsult - Follow Up" or "eConsult - Response").

**Step 1:** In the resident's electronic file, find the latest "eConsult - New" progress note. Click "View" to open the note. Here you will find the providers question for the specialist, which specialist group to submit the eConsult to, and instructions about supporting documents.



The screenshot shows the PointClickCare web interface. The browser address bar displays the URL: <https://www1.pointclickcare.com/care/chart/ign/priviewall.jsp?ESOLclie>. The page title is "Progress Notes". The navigation bar includes "Home", "Admin", and "Clinical" menus, along with a search bar and a "Sign Off" button. The main content area is titled "Progress Notes - View All" and shows a list of notes for a resident. A table with the following columns is visible: "Effective Date", "Type", "Note", "Care Plan Item or Task", "Dept.", "Shift Report", and "24 Hour Report". The first row in the table has a "view" link circled in red, with a red arrow pointing to it. The "Note" column contains a detailed medical history and a question for a specialist: "Specialty: Neurology-epilepsy. Text: 77M resident in long term care for 4 years. Medical history is significant for vascular dementia (MMSE 21/30) and associated behavioural symptoms including physical and verbal responsive behaviours towards co-residents and staff. Other significant Hx includes PAD and BKA in 2015 now fully dependent for most aspects of personal care including lift transfer, DM2, Hx of rectal ca and ?liver Mets, anxiety and depression. In addition patient has CAD and following an MI underwent CABG in 2006 complicated by Peri-operative CVA. While in rehab he was noted to have challenging behaviours. Approximately one year later he presented with presumed syncope in APR 2007 and later in July 2007 presented with suspected seizure provoked by CVA scar tissue. He has been treated with Dilantin since this time. He remains seizure free save for an episode of acute confusion followed by somnolence in Dec 2017 when Dilantin levels were noted to be sub therapeutic. Given this history do you feel the patient's long standing Dilantin could be contributing to personality changes leading to challenging behaviours? Given the remote Hx of seizure could he potentially discontinue Dilantin? If he remains at high risk for seizure would an alternative treatment potentially have less effects on personality? Your expertise and advise is truly appreciated. Thank you. C. Fung".

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**Step 2:** If supporting documents are to be included, print (if applicable), scan and email them to the designated email address, indicating the resident's initials and home area in the subject line for identification.

**Step 3:** Open the eConsult portal through the OTN Hub and Request a new Consult.

The screenshot shows the OTN Hub eConsult portal. At the top, there is a banner for "Ask a Clinical Question" with a "Launch eConsult" button and a "learn more" link. Below this, the "OTNhub Services" section includes four main options: "Connect with a Patient at Home", "Make a Video Call", "Find a Host Site", and "Find a Specialist". Each option has a brief description and a "Go" button. At the bottom of the page, there are two columns of links: "BEST PRACTICES" (eConsult Help, eConsult FAQs, Specialist Workflow, Requesting Provider Workflow) and "GETTING STARTED" (eConsult Course, Physicians: Submit a Request, Specialists: Respond to a Request, Telemedicine Case Studies). A navigation bar at the very bottom contains links for Directory, Videoconference, Schedule, eConsult, Teledermatology, Telehomecare, and Professional Development.

This screenshot shows the eConsult portal interface. The "OTN HUB" logo is in the top left. The navigation menu includes "Directory", "eConsult" (which is highlighted with a green underline), and "Learn". On the left side, a sidebar menu lists various options: "Request Consult" (highlighted with a red arrow), "All Requests", "Needs Attention (2)", "Waiting for Response", "Completed", "Cancelled", "Drafts", "Reports", and "Search". The main content area is titled "Draft Cases" and displays a list of draft cases, each with a "Draft case" button. The cases listed are: "Dr. eConTest1 CoERef1 | Cardiology Specia...", "Dr. eConTest1 CoERef1 | Cardiology Specia...", "Dr. eConTest1 CoERef1 | Concussion — Ad...", and "Dr. eConTest1 CoERef1 | Hematology".

**Step 4:** Select the referring physician or nurse practitioner from the “Requester” drop down menu for whom you are submitting the eConsult case.

The screenshot shows the Otn HUB eConsult interface. The top navigation bar includes 'Directory', 'Videoconference', 'eConsult' (highlighted), 'Schedule', and 'Learn'. The left sidebar has a 'Request Consult' button and a list of filters: 'All Requests', 'Needs Attention', 'Waiting for Response', 'Completed', 'Cancelled', 'Drafts' (highlighted), 'Reports', and 'Search'. The main content area is titled 'Draft Cases for' and includes a dropdown menu for 'all requesters I can act on behalf of' with 'Dr. Danny Dent' selected. To the right, the '\*Requester' dropdown is open, showing 'Dr. Danny Dent, Family /General Practice Medicine' and 'Dr. Jack Wall, Family /General Practice Medicine'. Below this, the '\*Model' section has two radio buttons: 'BASE Managed Specialty' and 'Specific Provider or Group'. The footer contains links for 'Website Terms & Conditions', 'Privacy Statement', 'Terms of Service', 'User Agreement', 'otn.ca', and 'Email Support or'.

**Step 5:** Select either the “BASE Managed Specialty” model, for a menu of specialty groups, or “Specific Provider or Group”.

This close-up shows the 'Requester' field set to 'Dr. eConTest1 CoERef1, Family /General Practice Medicine'. Below it, the '\*Model' section has two radio buttons: 'BASE Managed Specialty' (selected) and 'Specific Provider or Group'.

**BASE Managed Specialty:** this option allows you to submit cases to a regional Managed Specialty, which is a group of consultants responding to eConsult cases for a given specialty or sub-specialty (ex. Pediatric Cardiology). These consultants have received privileges for completing eConsult cases. Your case will be routed to the closest Regional Managed Specialty or a Provincial Managed Specialty if a local one is not available. Cases are assigned based on consultants' availability.

**Specific Provider or Group:** this option allows you to submit cases to specific consultants by name or to organizational or regional groups (ex. UHN's SCOPE group). Cases are sent directly to the consultant or group.

**Step 6:** Select the specialty group or specialist to be consulted.

Draft Cases

Dr. eConTest1 CoERef1 | Cardiology Specia...

**Draft case**

Dr. eConTest1 CoERef1 | Cardiology Specia...

**Draft case**

Dr. eConTest1 CoERef1 | Concussion — Ad...

**Draft case**

Dr. eConTest1 CoERef1 | Hematology

**Draft case**

Dr. eConTest1 CoERef1 | Dr. Liane Porepa

**Draft case**

Dr. eConTest1 CoERef1 | Provincial Concus...

**Draft case**

Dr. eConTest1 CoERef1 | Provincial Genera...

Type your question here...

**Draft case**

Dr. eConTest1 CoERef1 | Provincial Geriatri...

**Draft case**

Requester **Dr. eConTest1 CoERef1, Family /General Practice Medicine**

\*Model  **BASE Managed Specialty**  
 Specific Provider or Group

\*Specialty **Select category...**  
Allergy and Clinical Immunology  
Anesthesiology  
Cardiology  
Concussion  
Dermatology  
Endocrinology  
Gastroenterology  
Genetics  
Geriatrics  
GeriMedRisk  
Gynecology  
Hematology and Thrombosis  
Hepatology  
HIV  
Infectious Diseases  
Internal Medicine  
Nephrology  
Neurology  
Obstetrics  
Oncology  
Ophthalmology  
Opioid and Addiction  
Orthopaedics  
Otolaryngology  
Pain Medicine  
Pediatrics  
Physical Medicine and Rehabilitation  
Psychiatry  
Radiology

\*Region

Patient \*First N  
Middle  
\*Last N  
\*DOB  
\*Gender  
\*OHIP  
 Co

\*Request Enter h  
tests) t

Requester **Dr. eConTest1 CoERef1, Family /General Practice Medicine**

\*Model  BASE Managed Specialty  
 **Specific Provider or Group**

\*Recipient **Neurology**

Patient \*First N  
Middle  
\*Last N  
\*DOB  
\*Gender  
\*OHIP  
 Co

Dr. Evan Lewis, Toronto, LHIN 7, **Neurology**  
Telemedicine service: **Neurology**, Paediatric **Neurology**

Pediatric **Neurology** Specialty Group, Province-wide Specialty Group

Dr. Kuan Ng, Hamilton, LHIN 4, **Neurology**

Dr. Eduard Bercovici, Toronto, LHIN 6, **Neurology**  
Telemedicine service: **Neurology**

Dr. Lysa Boisse Lomax, Kingston, LHIN 10, **Neurology**

Dr. Nevena Markovic, London, LHIN 2, **Neurology**

Dr. Pankaj Kapoor, Windsor, LHIN 1, **Neurology**

Dr. Ramana Appireddy, Kingston, LHIN 10, **Neurology**

Dr. Sean Taylor, Kingston, LHIN 10, **Neurology**

Dr. Manpreet Kaur, Toronto, LHIN 8, **Neurology**

**Step 7:** Enter the resident's patient information and case details. Cut and paste the eConsult question, as written by the provider in the progress note, into the text box. Attach any supporting documents requested by the provider. Send the eConsult.

Patient	*First Name	Ulysses	
	Middle Name	Simpson	
	*Last Name	Grant	
	*DOB	1922-04-27	
	*Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other	
	*OHIP	Enter patient OHIP number...	Version code
		<input checked="" type="checkbox"/> OHIP number not available	
	<input type="checkbox"/> Consent Directives		

\*Request

In a recent CBC, patient's platelets are 50,000 and white blood cell count is 1,200. I'm attaching the entire CBC for your reference. Patients is otherwise well and has no significant past history other than hypertension well controlled for several years on enalapril 10mg a day. The previous CBC, completed a year ago was normal. Is this something to pursue or should I wait and retest CBC in 3 months? Thank you in advance for your assistance.



Draft Saved

Delete Draft

Send

Drag and drop files here

**Step 8:** Once the eConsult is submitted, delete all supporting documents from email and personal electronic files.

## Updating the Provider with the Specialist's Response

When a specialist responds to an eConsult case, you will share the response with the provider who initiated the eConsult and facilitate their follow-up, if needed.

**Step 1:** Open the original "eConsult - New" progress note in PointClickCare by clicking "View" on the left hand side of the note. When the progress note appears, click "Follow Up".

Progress Notes - Internet Explorer

https://www1.pointclickcare.com/care/chart/ipn/newipn.jsp?ESOLpnid=1451617&ESOLclientid=35953

**View Progress Note**

Resident: [REDACTED]

Type: **Econsult - NEW**

Focus:

Effective Date: **3/13/2018 09:44:00**

Department: **Physicians**

Position: **Physician**

Created By: [REDACTED]

Created Date: **3/13/2018 09:54:21**

Specialty: Geriatrics - medications

Text: 70M resident in long term care x 4 years. Admission d/t inc care requirements 2dry to demnetia w/ resistance to care; hx of depression, remote overdose req'g hospital admission and ADHD. At admission pt was taking bupropion SR

Show on Shift Report

Show on 24 Hour Report

Show on MD/Nursing Communications Report

Strike Out Follow Up Cancel

**Step 2:** When the new progress note window opens, choose “eConsult – Follow Up” as the note type.

Progress Notes - Internet Explorer  
https://www1.pointclickcare.com/care/chart/ipn/newipn.jsp?ESOLclientid=36200

**New Progress Note**

Resident: [REDACTED]

Type: Econsult - FOLLOW UP

This note is a follow up to: 3/14/2018 14:46:00 Econsult - NEW [Author: [REDACTED]]

Care Plan Item or Task: [REDACTED] clear

Effective Date: 3/16/2018 Time: 23:54

Note Text:

Show on Shift Report  
 Show on 24 Hour Report  
 Show on MD/Nursing Communications Report  
 Edit Care Plan Immediately

Position: Physician  
Created By: [REDACTED]  
Created Date: 3/16/2018 23:54:16

Sign Sign & New Save As Draft Cancel

**Step 3:** Open the eConsult platform and the response from the specialist. Cut and paste the response from the specialist into the new “eConsult – Follow Up” progress note.

**Step 4** (if applicable): If the specialist included attachments in their response, add “see attachments” to the “eConsult – Follow Up” progress note and print the attachments for the provider.

When the provider reviews the specialists’ response, they may either respond for follow up or close the case. If they decide to follow up with the specialist about the case, they will create a new “eConsult – Follow Up” progress note in the resident’s electronic file and create an order in their chart. You will be notified of the eConsult follow up request and any other instructions included with the order.

## Following up with the Specialist

**Step 1:** Open the new “eConsult – Follow Up” progress note created by the provider in PointClickCare by clicking “View” on the left hand side of the note.

**Step 2:** Open the eConsult portal through the OTN Hub and open the case. Select “Request Clarification”.

**Step 3:** Cut and paste the provider’s follow up response, as written in the progress note, into the text box. Attach any supporting documents requested by the provider.

**Step 4:** When the specialist responds, update the provider as described above in “Updating the Provider with the Specialist’s Response”.

## Closing an eConsult Case

Once there are no further follow up questions from the provider, the close out survey can be completed and the case can be closed.

An efficient way of getting the provider’s responses for the eConsult Close Out Survey is to create a google form or equivalent that can be sent to them by email. Once the provider completes the form, the delegate transcribes their responses into the Close Out Survey in the eConsult portal. A sample email and form are shown below.

**Step 1:** Email the eConsult Close Out Survey form to the provider with the resident’s initials and the Resident Home Area in the subject line.

 Send	To...	Requesting Physician
	Cc...	
	Subject:	eConsult Close Out Survey - [Resident's Initials and Home Area]

Dear Dr. X

To complete the eConsult case you recently submitted, please complete the form linked below. Your answers to these questions will be transcribed into the eConsult portal.

Your feedback on eConsult is instrumental in future directions and enhancements on this type of service. Please take a moment to choose the responses that represent you views regarding this specific case.

Link to form: [\[Insert Link Here\]](#)

Kind regards,  
[Your Name]

**Step 2:** Regularly review the form for completed surveys. Click on “Responses” to view survey responses. Click “Individual” to view individual responses.

QUESTIONS **RESPONSES**

## eConsult Close Out Survey

Your feedback on eConsult is instrumental in future directions and enhancements on this type of service. Please take a moment to choose the responses below that represent you views regarding this specific case.

Which of the following best describes the outcome of this eConsult for your patient: \*

- I was able to confirm a course of action that I originally had in mind
- I got good advice for a new or additional course of action
- I did not find the response very useful
- None of the above (please comment)

As a result of this eConsult would you say that: \*

**Step 3:** When the survey for a case has been completed, open the eConsult portal through the OTN Hub and open the case. Select “Complete” to access the Close Out Survey.

My clinical question has been answered. I want to mark the case as completed

days ago

**Complete**

Request Clarification

Provide feedback to the specialist (optional)...

**Complete**

**Step 4:** Transcribe provider's responses into the Close Out Survey in the eConsult portal and close the case. Once transcribed, delete the survey response from the shared spreadsheet.

Before you complete...

Your feedback on eConsult is instrumental in future directions and enhancements to this type of service. Please take a moment to choose the responses below that represent your views regarding this specific case:

\*1. Which of the following best describes the outcome of this eConsult for your patient:

- I was able to confirm a course of action that I originally had in mind
- I got good advice for a new or additional course of action
- I did not find the response very useful
- None of the above (please comment)

\*2. As a result of this eConsult would you say that:

- Referral was originally contemplated but now avoided at this stage
- Referral was originally contemplated and is still needed
- Referral was not originally contemplated and is still not needed
- Referral was not originally contemplated, but eConsult process resulted in a referral being initiated
- There was no particular benefit to using eConsult in this case
- Other (please comment)

3. We would value any additional feedback you provide on the system/application:

Enter comments...

**If cases remain open two weeks after the specialist response was received, resend the email with a link to the Close Out Survey form to the provider for completion.**