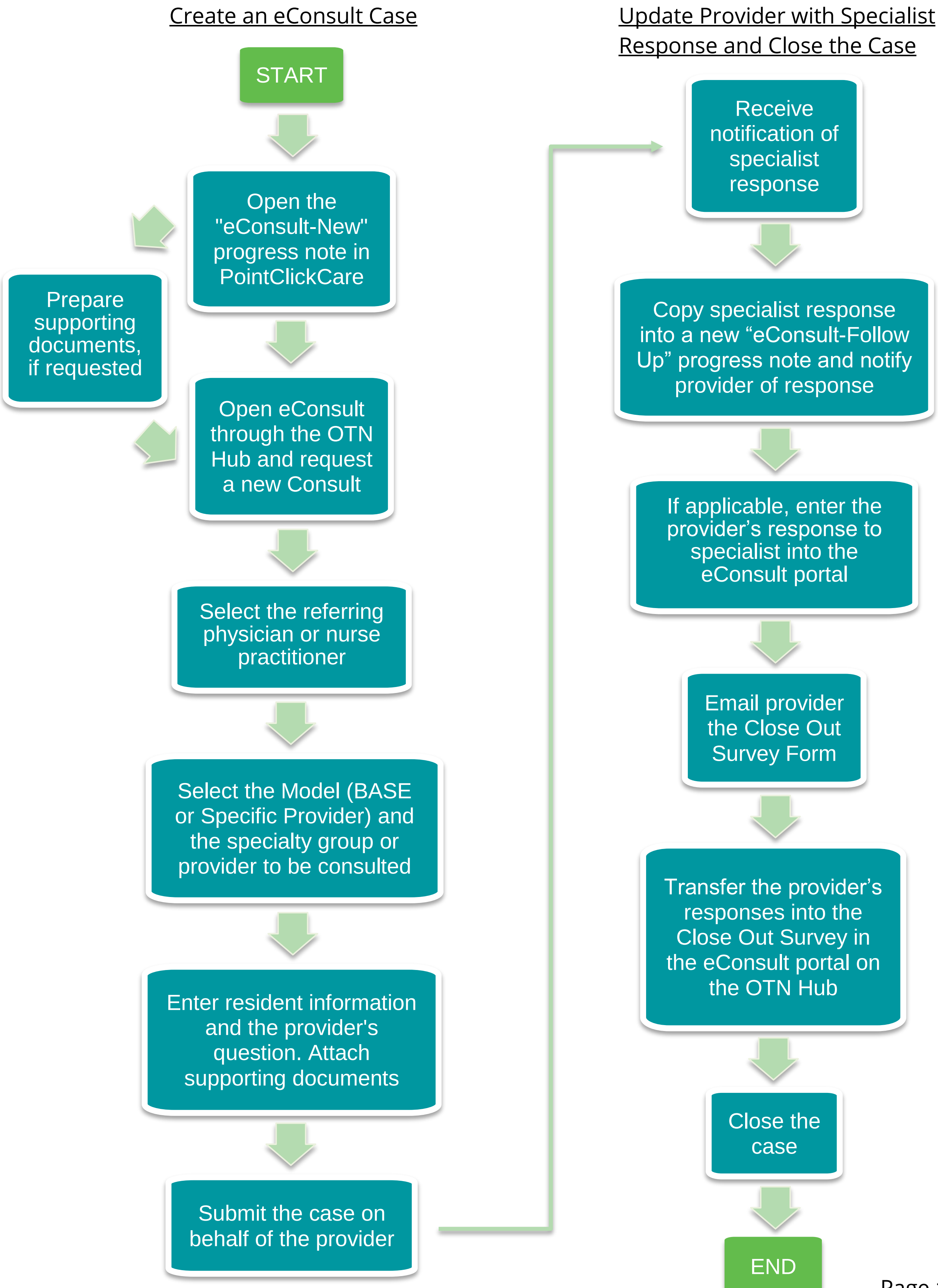
eConsult
Ontario eConsult Program

eConsult Workflow Guide:

Using a Delegate for eConsult Submission with PointClickCare

For Delegates of Providers in Long-Term Care

Workflow Chart



Purpose of this Workflow Guide

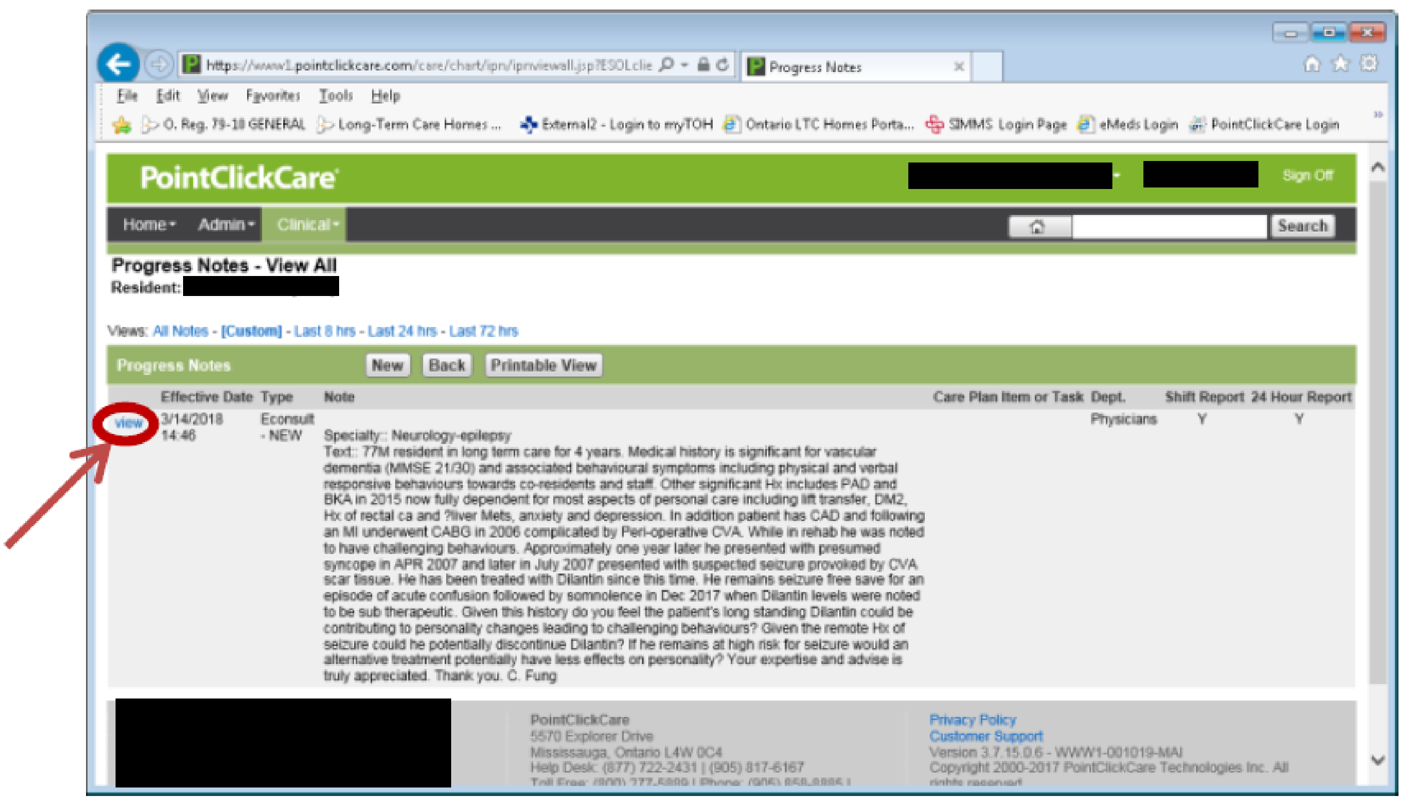
This guide describes the steps to be taken by a delegate using eConsult on behalf of a physician or nurse practitioner. This workflow is integrated with the PointClickCare (PCC) platform and allows the provider to submit a case without leaving PCC. It may be adapted to particular homes' existing workflows,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

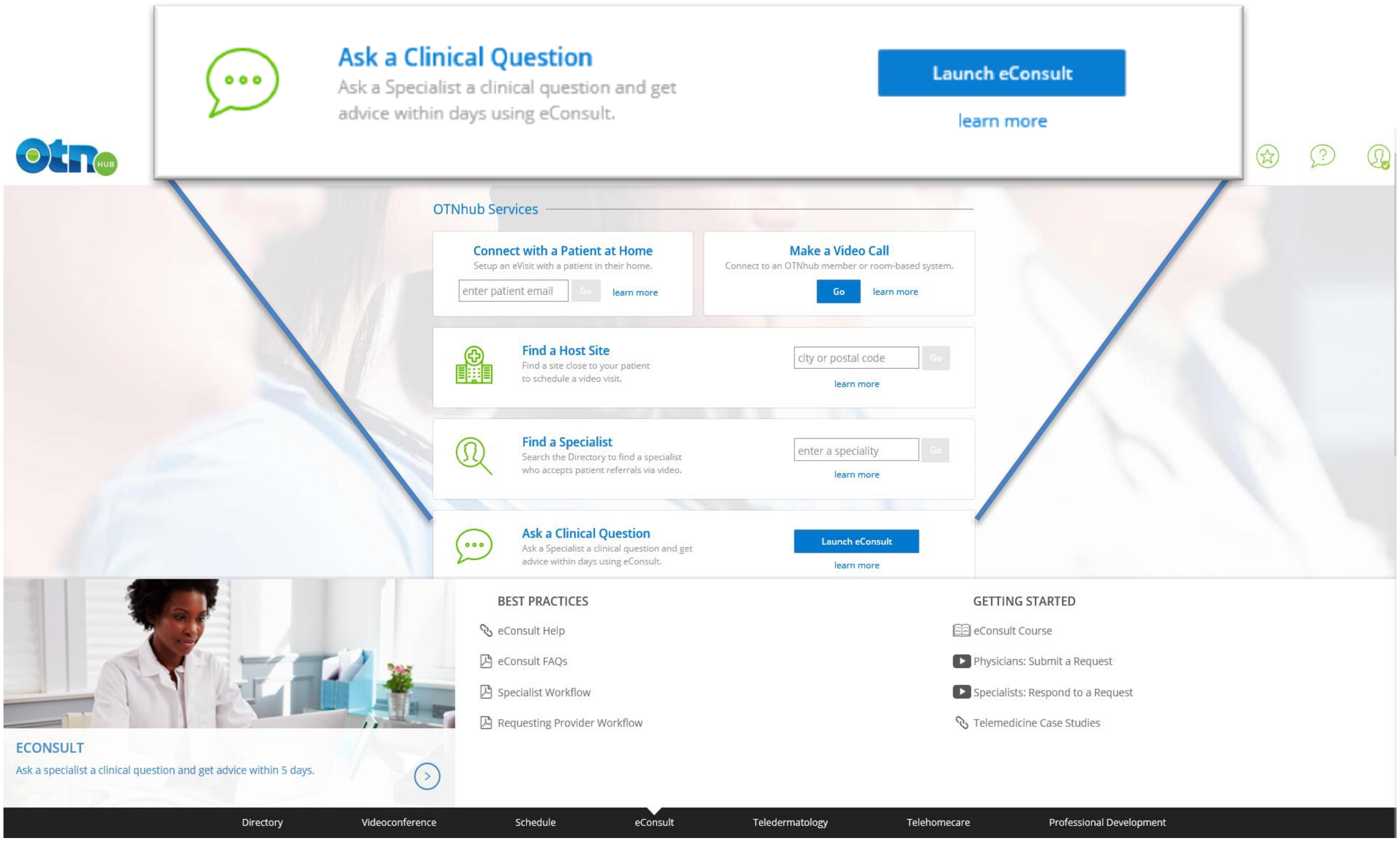
Two new progress note types will need to be created in PointClickCare to facilitate the below workflow. The first should be for new eConsults (ex. "eConsult – New") and the second for follow up content on an existing eConsult case, such as the response from the specialist or additional questions sent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

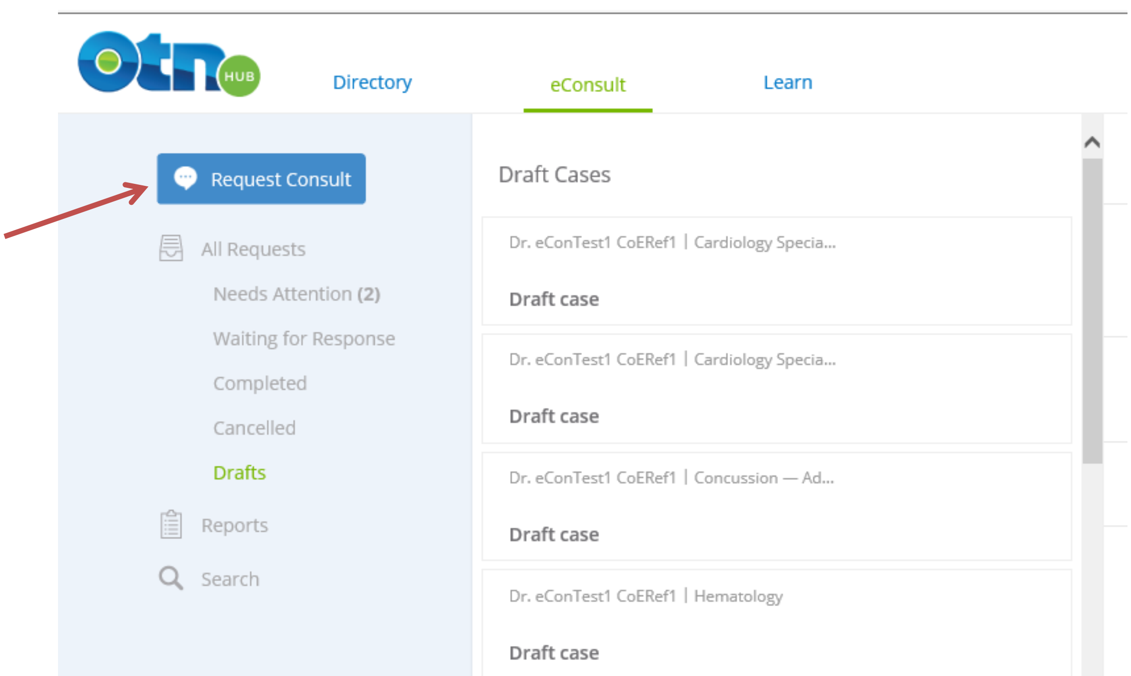
Step 1: In the resident's electronic file, find the latest "eConsult – New" progress note. Click "View" to open the note. Here you will find the providers question for the specialist, which specialist group to submit the eConsult to, and instructions about supporting documents.



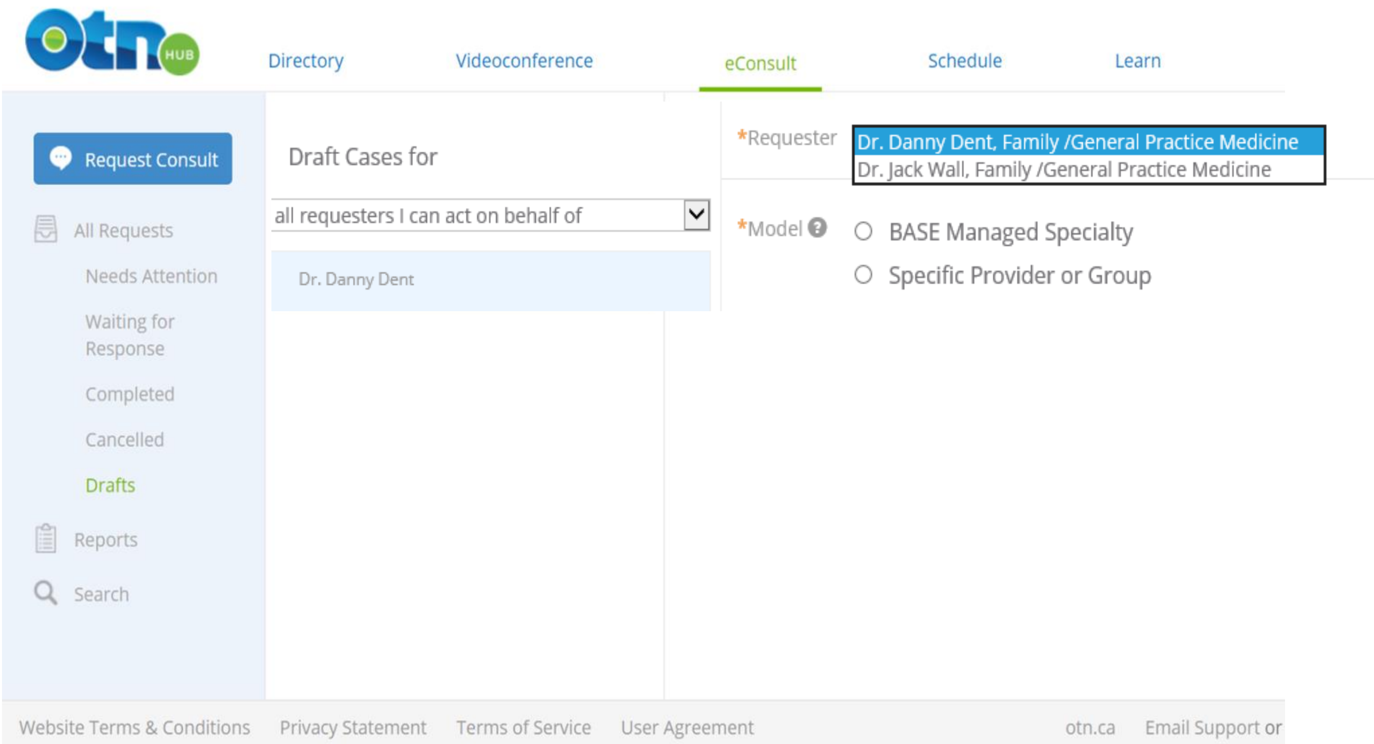
Step 2: If supporting documents are to be included, print (if applicable), scan and email them to the designated email address, indicating the resident's initials and home area in the subject line for identification.

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

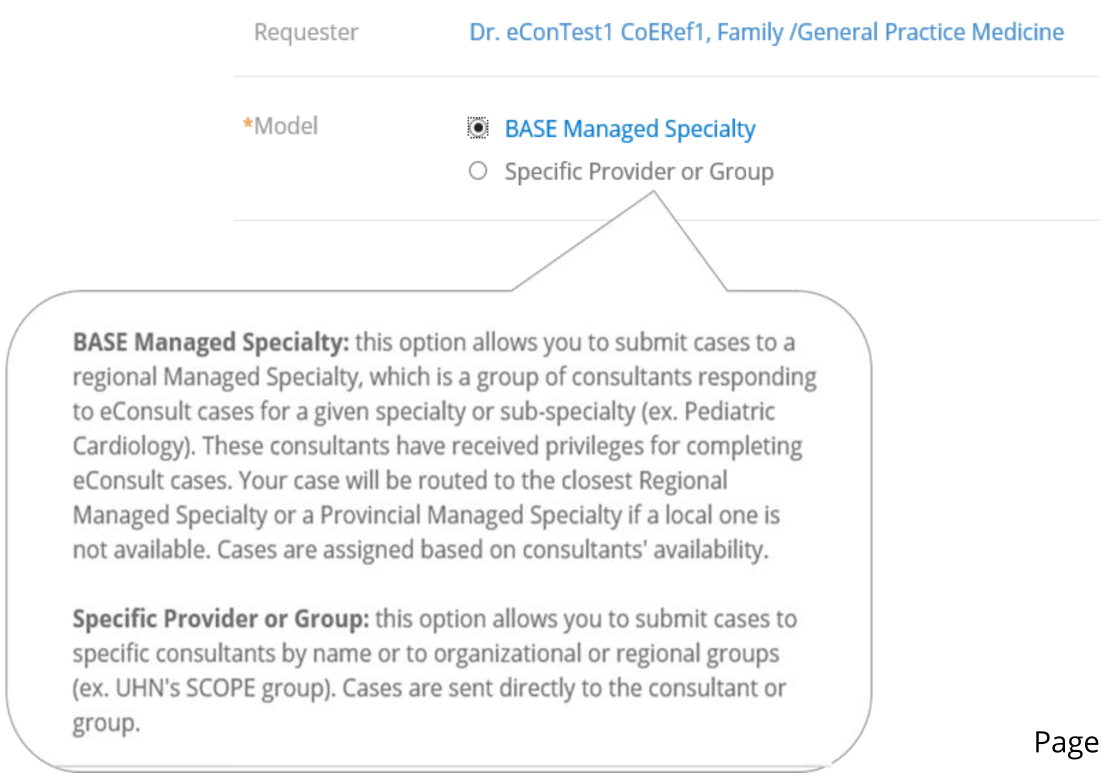




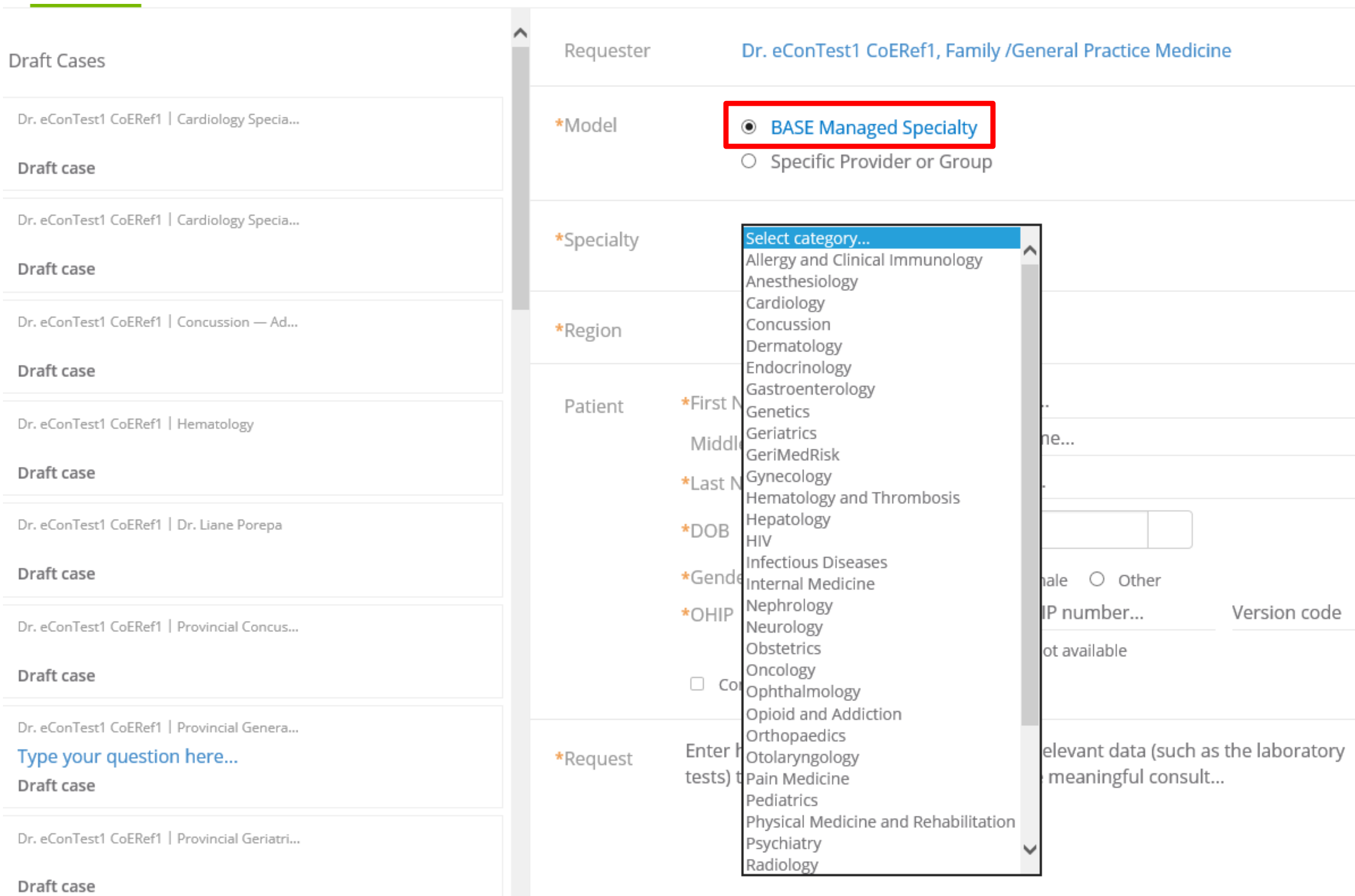
Step 4: Select the referring physician or nurse practitioner from the “Requester” drop down menu for whom you are submitting the eConsult case.

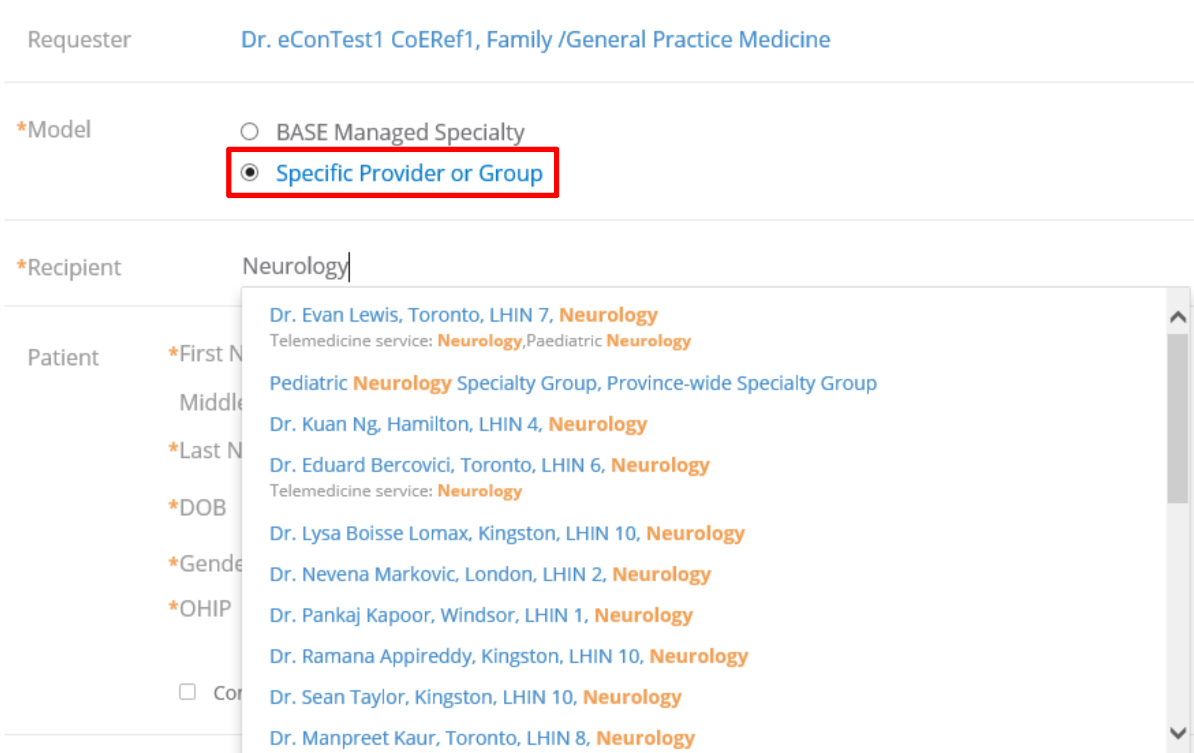


Step 5: Select either the “BASE Managed Specialty” model, for a menu of specialty groups, or “Specific Provider or Group”.

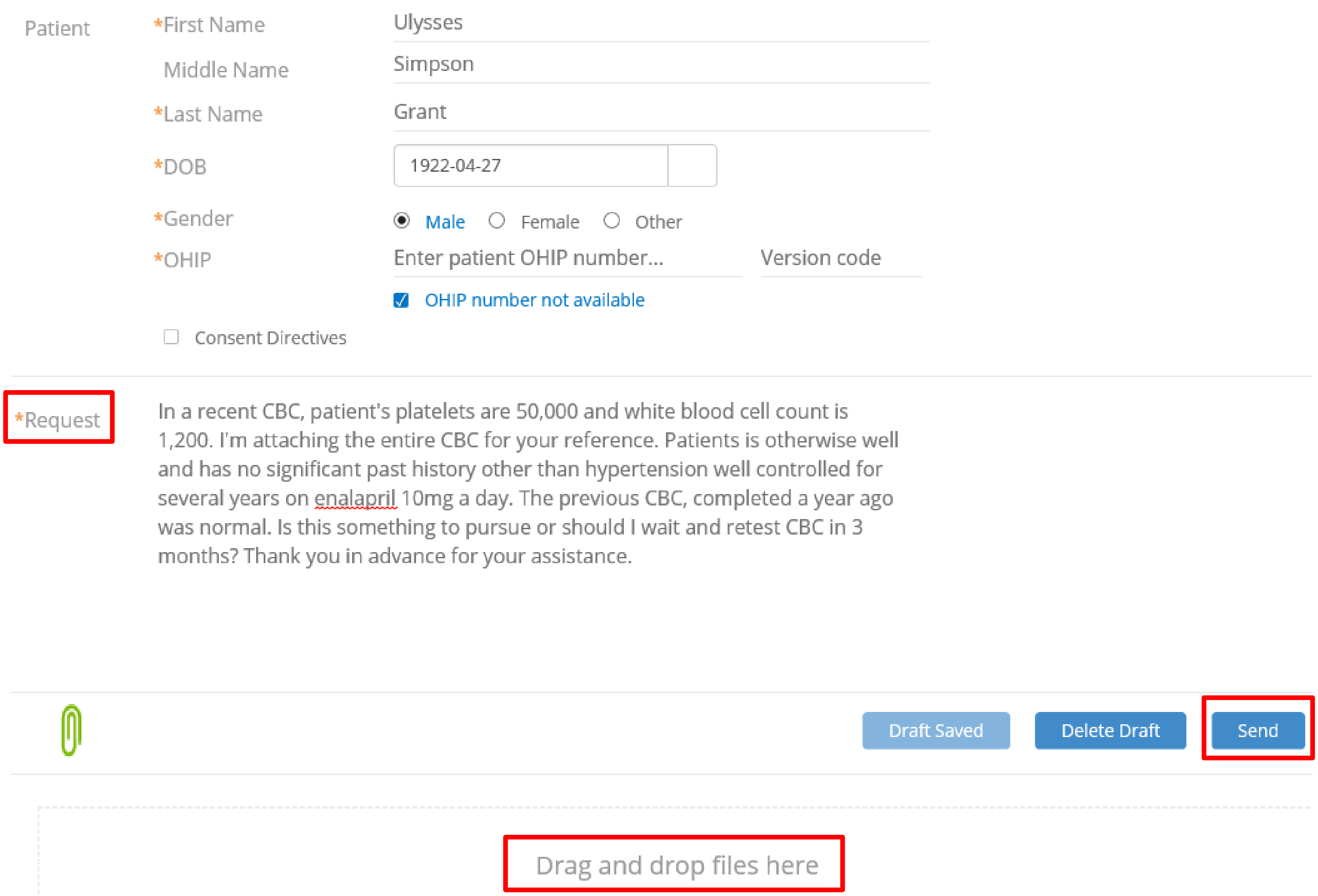


Step 6: Select the specialty group or specialist to be consulted.





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 Male Female Other
*OHIP Enter patient OHIP number... Version code
OHIP number not available
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

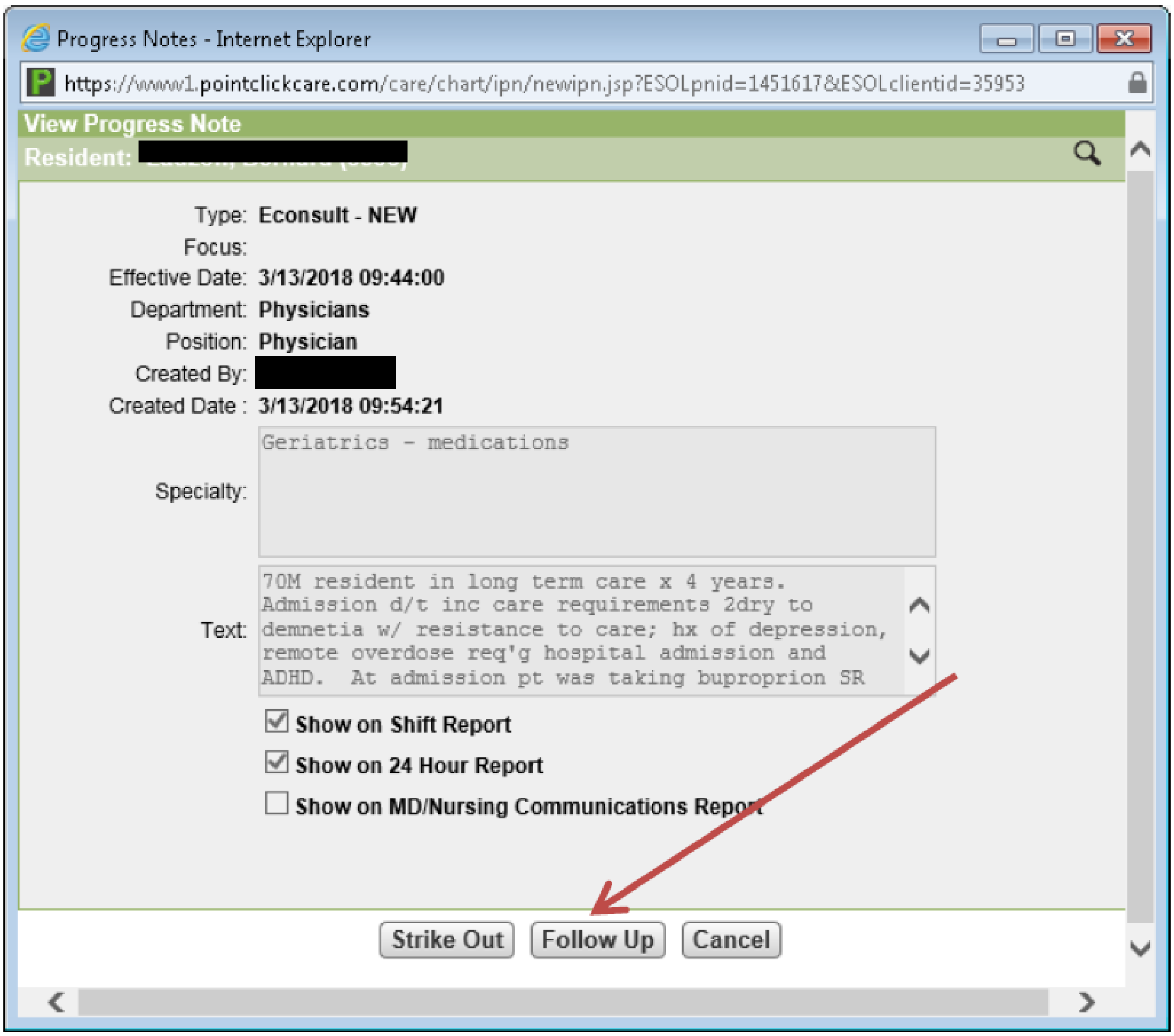
Drag and drop files here

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

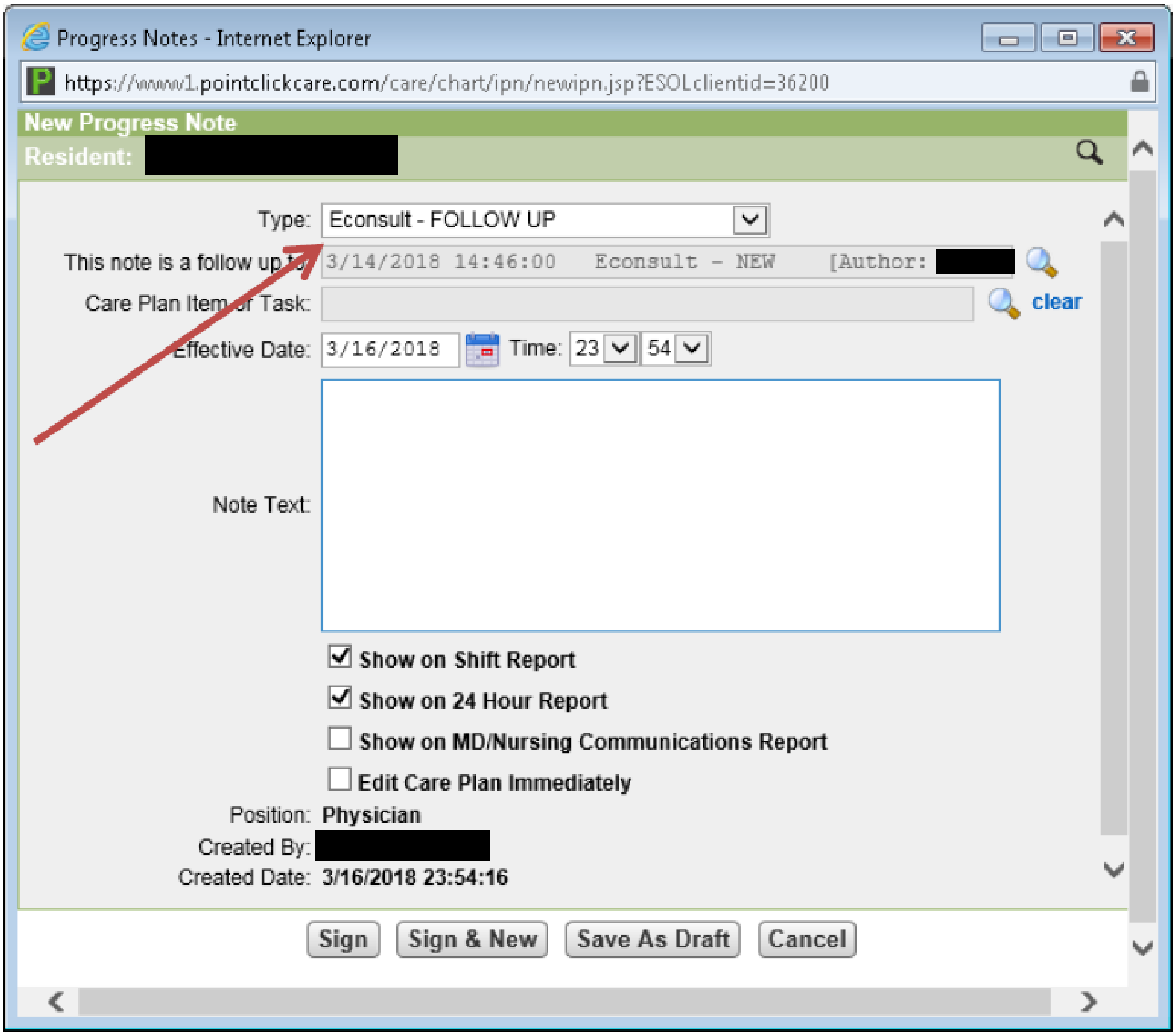
Updating the Provider with the Specialist's Response

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".



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



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.

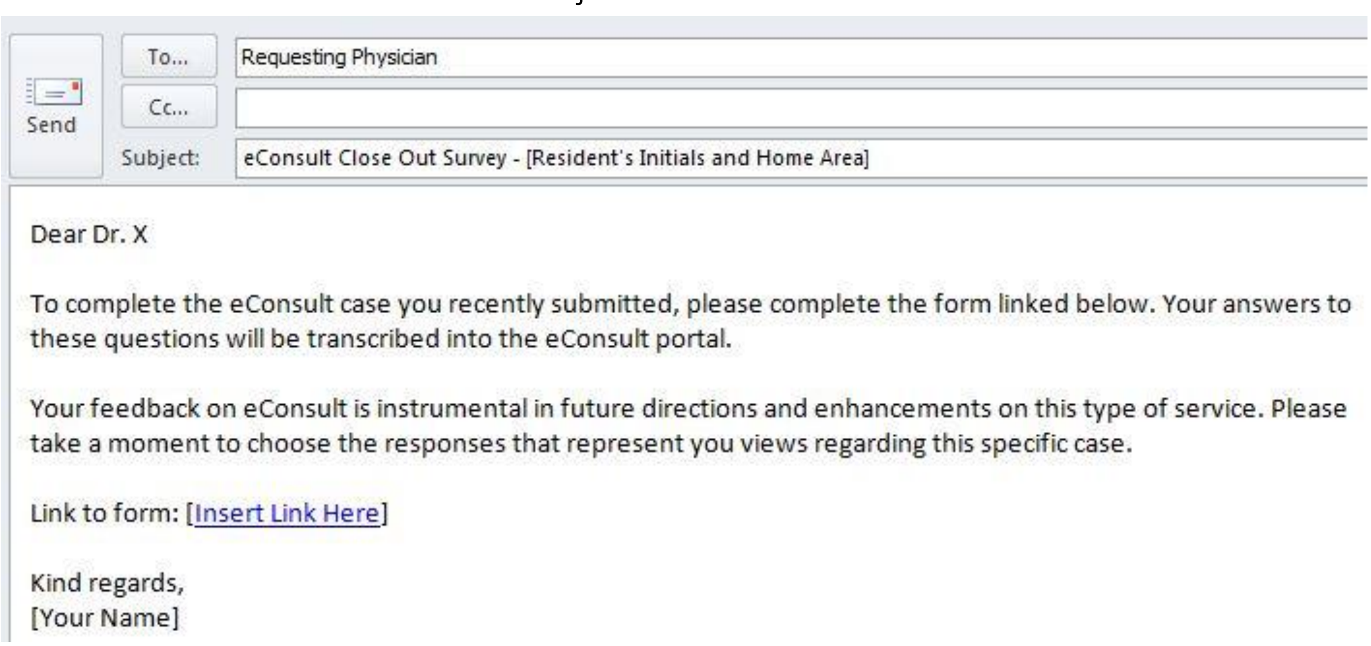
Step 4: When the specialist responds, update the provider as described above in “Updating the Provider with the Specialist’s Response”.

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

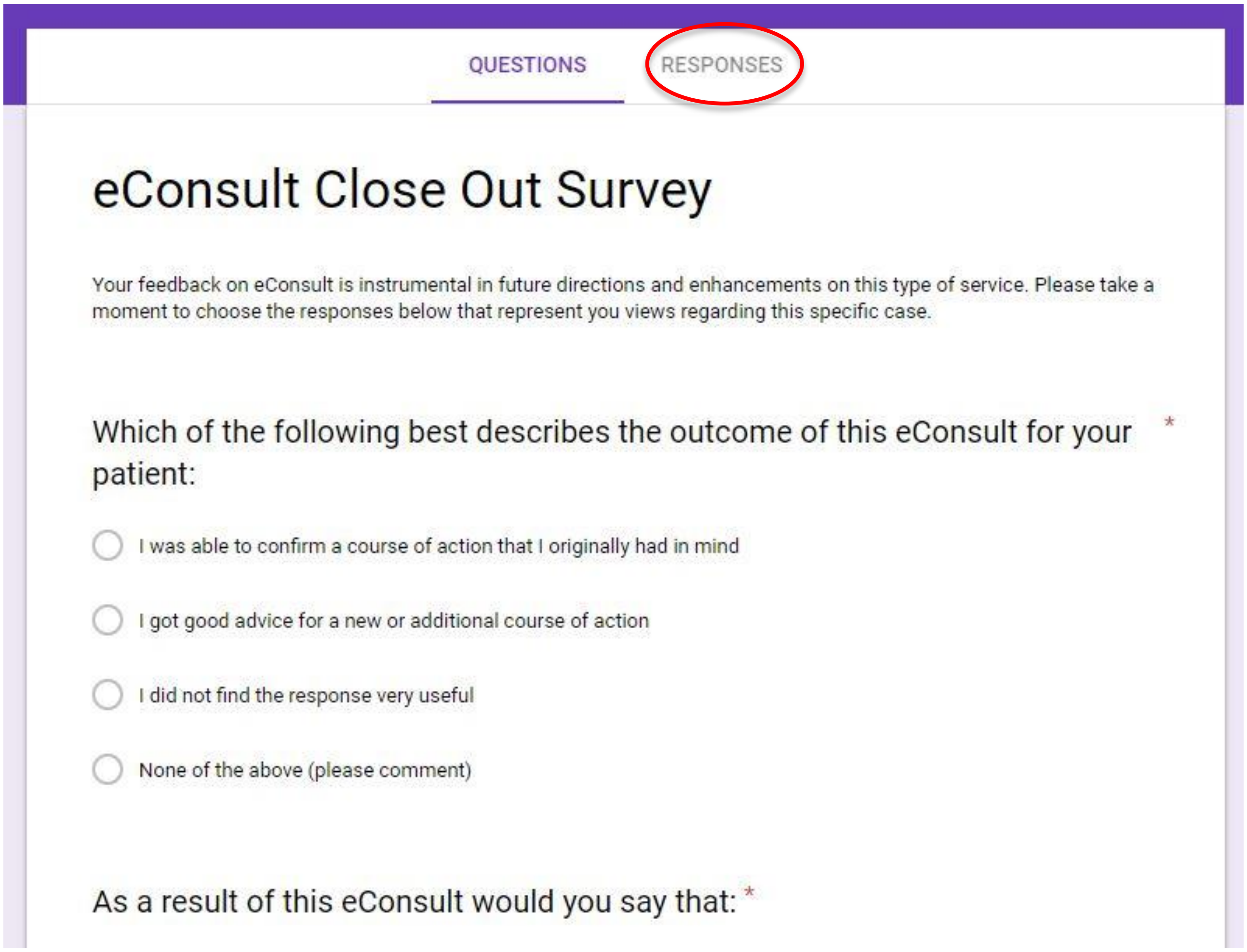
To complete the eConsult case you recently submitted, please complete the form linked below. Your answers to these questions will be transcribed into the eConsult portal.

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.

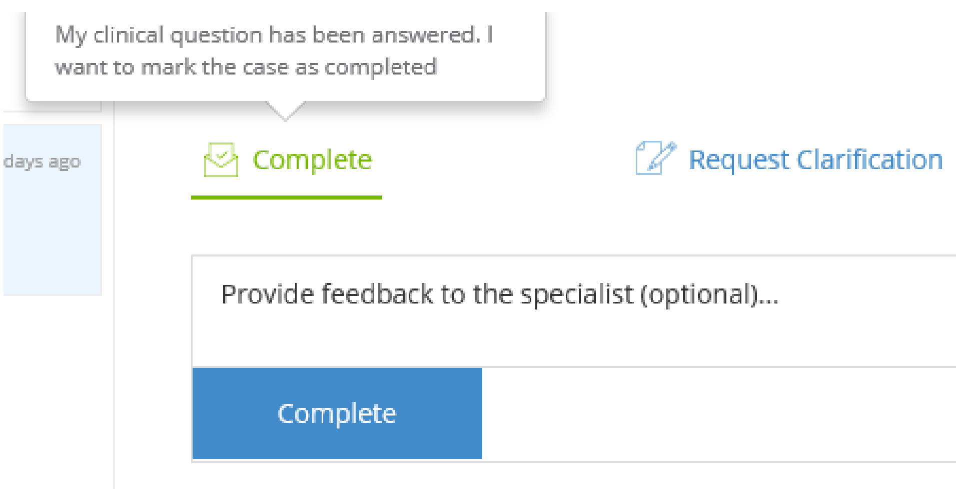
Link to form: [Insert Link Here]

Kind regards,
[Your Name]

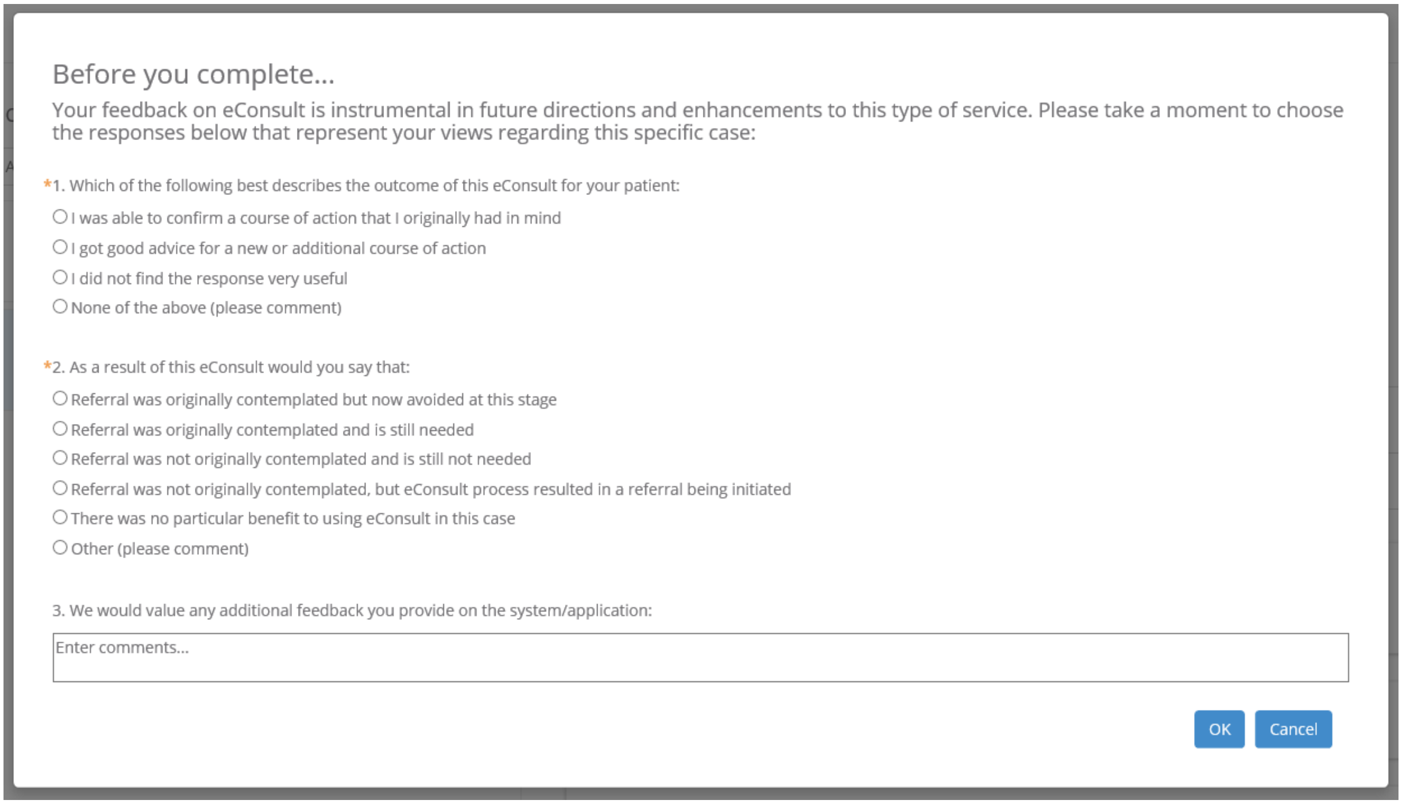
Step 2: Regularly review the form for completed surveys. Click on “Responses” to view survey responses. Click “Individual” to view individual responses.



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.



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...

OK Cancel

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.