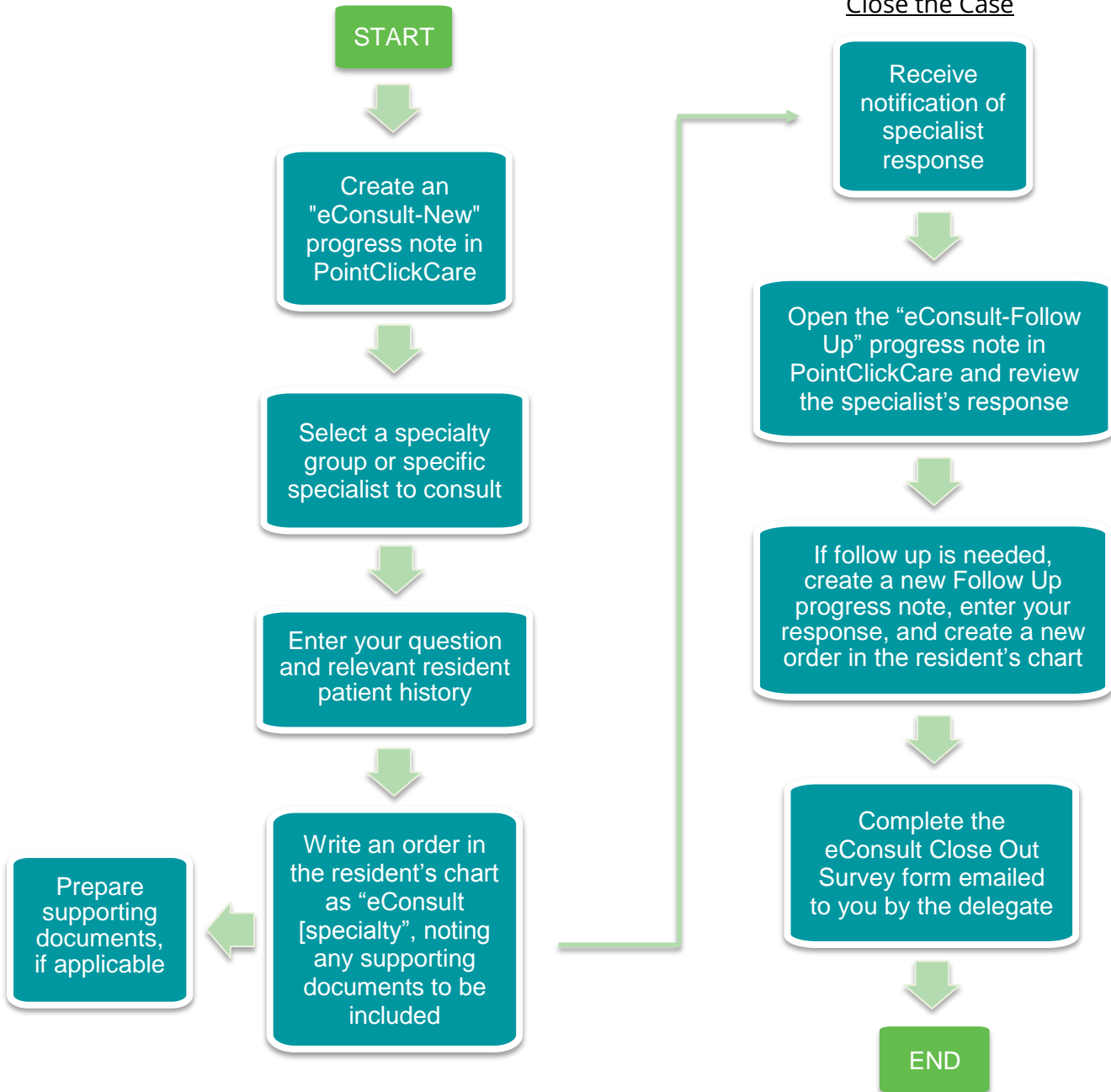# eConsult Workflow Guide:

Using a Delegate for eConsult Submission with PointClickCare

For Physicians and Nurse Practitoners in Long-Term Care

Workflow Chart

Create an eConsult Case

START

↓

Create an "eConsult-New" progress note in PointClickCare

↓

Select a specialty group or specific specialist to consult

↓

Enter your question and relevant resident patient history

↓

Write an order in the resident's chart as "eConsult [specialty", noting any supporting documents to be included

← Prepare supporting documents, if applicable

Review Specialist Response and Close the Case

Receive notification of specialist response

↓

Open the "eConsult-Follow Up" progress note in PointClickCare and review the specialist's response

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If follow up is needed, create a new Follow Up progress note, enter your response, and create a new order in the resident's chart

↓

Complete the eConsult Close Out Survey form emailed to you by the delegate
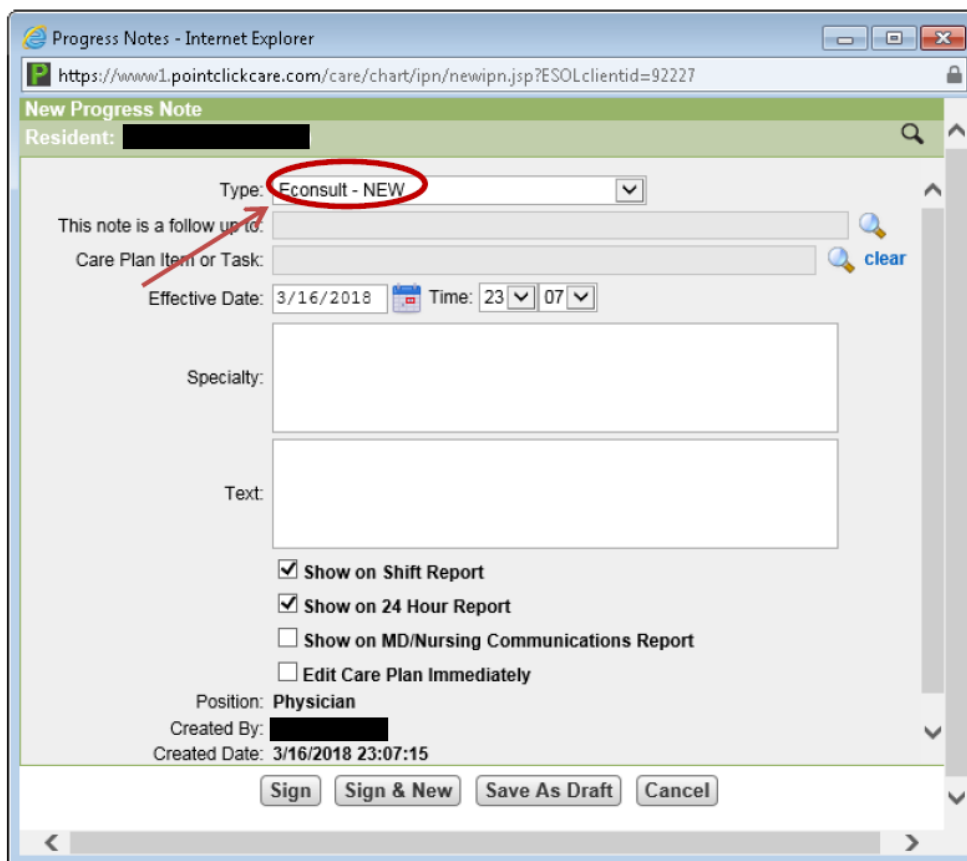
↓

END

Purpose of this Workflow Guide

This guide describes the steps to be taken by a physician or nurse practitioner using eConsult via a delegate. 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.

Creating an eConsult Case

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: Create a new "eConsult – New" progress note in PointClickCare.

Step 2: Enter the speciality group you wish to send the eConsult to (e.g. Dermatology) in the "Specialty" field. If there is a specific specialist you wish to consult, please include their name as well.

Step 3: Enter your question and relevant resident history, medications, or diagnostic information in the text field. Supporting documents, such as medication lists, test results, or images can be included when the case is submitted by the delegate.

Step 4: Write an order in the resident's chart with the title "eConsult [enter specialty]".

Step 5 (if applicable)**:** If you wish to include supporting documents from the chart (e.g. ECG, lab results, diagnostic imaging results, or previous consultation notes) collect those pertinent documents and flag them with the eConsult order in the chart.
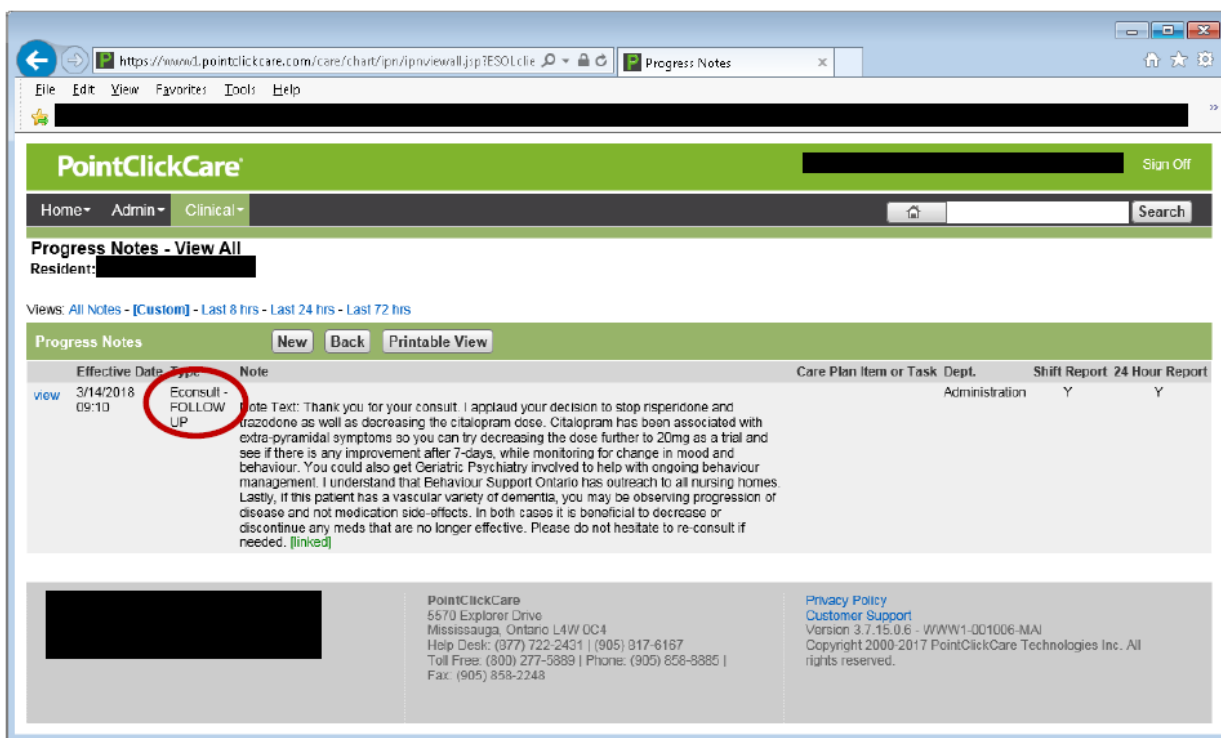
Step 7 (if applicable)**:** If you wish to include documents that are stored electronically, note this in the order description (e.g. "eConsult thrombosis, include med profile").

Step 8 (if applicable)**:** If you wish to include images (e.g. photos of skin lesions or radiology images), email those images to the designated delegate.* In the subject line, include the initials and home area of the resident they pertain to. Indicate this in the order by writing "include email attachments".

*Please ensure that individuals in emailed photos are not identifiable and that the image is deleted from your outbox and files after sending.
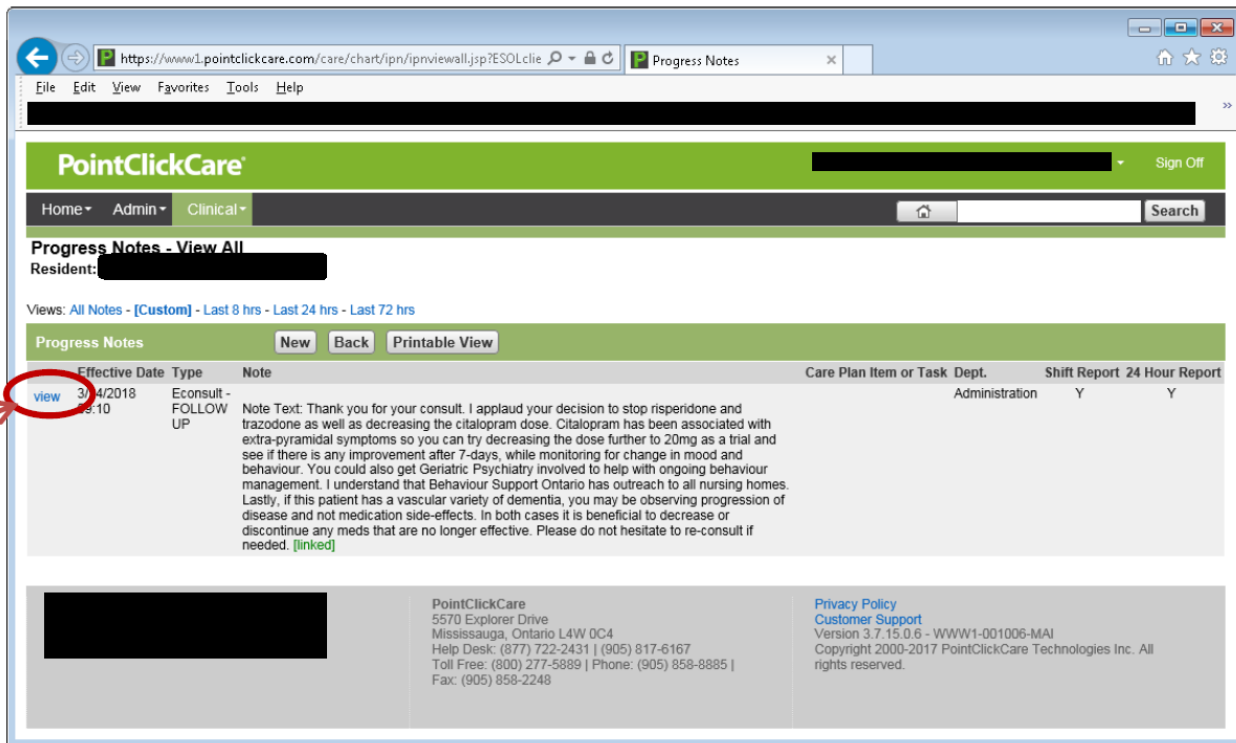
Reviewing the Specialist Response

When the specialist responds to your eConsult case, the delegate will create a progress note and send you an email to notify you.

Step 1: Upon receipt of the delegate's email, which will include the resident's initials and home area in the subject line, search for "eConsult – Follow Up" in the progress notes.

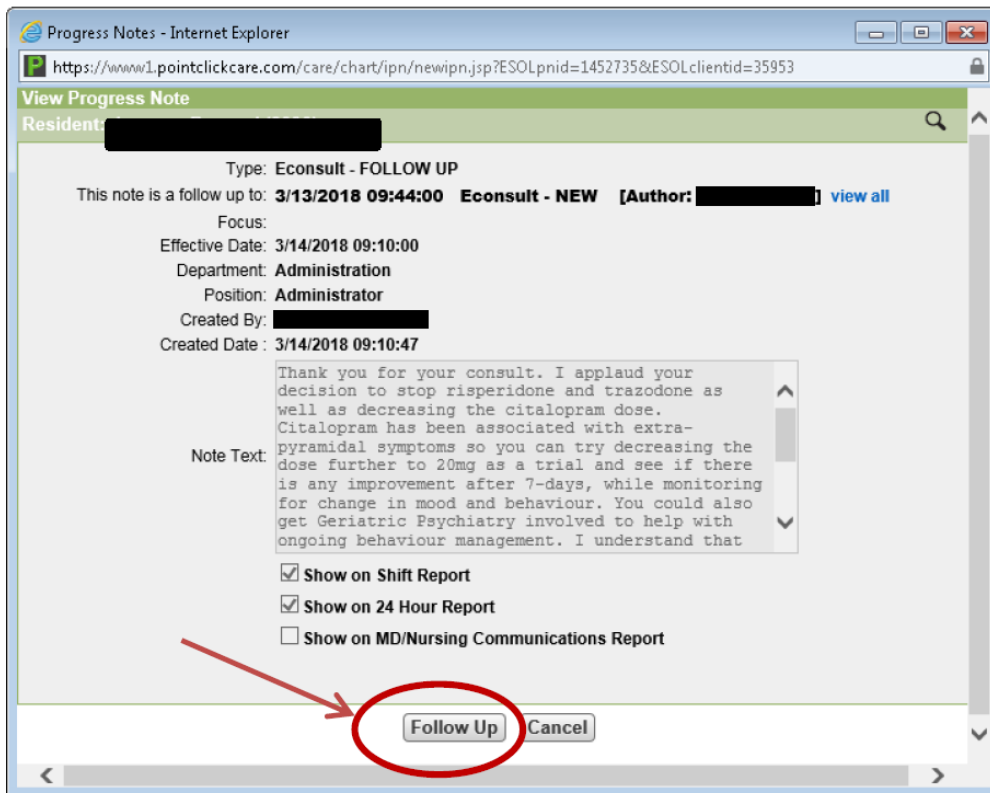**Step 2:** After reviewing the specialist's response, you may either respond for follow up or close the case.

Responding for Follow Up

Step 1: If further follow-up with the specialist is needed, click "View" to open the progress note and click "Follow Up" in the new window.

Step 2: Choose "eConsult – Follow Up" as the progress note type and enter the follow up question or information into the text box.

Step 3: Write an order in the chart with the title "eConsult Follow Up" and include attachments as described above.

Closing an eConsult Case

Step 1: Once there are no further follow up questions, you will receive a link to a three-question Close Out Survey form from the delegate by email. Please complete the Close Out Survey promptly after receipt so the delegate may transcribe your responses into the eConsult portal and close the case.

Billing
You may be eligible to bill **K738** (Physician to Physician e-Consultation – Referring Physician) in specific circumstances. Please review the **Schedule of Benefits** page **A33** for details.