

Champlain BASE Project

Building Access to Specialists through eConsultation

Training Document

Specialist Manual

A Collaboration...



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Building Access to Specialists

Through EConsultation

Introduction

The Building Access to Specialists Through EConsultation application is to assist Primary Care Practitioners and Specialists to utilize e-communication for consultation and referral purposes. The eConsultation application will ultimately reduce the number of clinic referrals, improve access to Specialists, will result in fewer visits for individuals requiring formal consultation and ensure information is sent back to the Primary Care Practitioner in a timely manner. High levels of satisfaction for providers participating in the initiative are also expected.

This guide will explain the Building Capacity for Specialized Services Through eConsultation to Specialists and their staff.

Specialists

1. Logging On
2. Opening an eConsultation
3. Completing an eConsultation: Step by Step Instructions
4. Notifications
5. Additional information
6. Referral accepted by the Primary Care Practitioner
7. Referral declined by the Primary Care Practitioner
8. End of study survey
9. Troubleshooting tips
10. eConsult support

Specialists

1. Logging on

- You will receive a notification of a new eConsultation through your email address. The sender's address is: nintex@lhinworks.on.ca. Please verify your junk mail folder regularly for eConsult requests. **Do not reply to this email address.**
- A short cut will appear in the Specialist's email. Click on the link to access the eConsultation through the SharePoint environment. You may also manually type the address in your web browser: <https://www.lhinworks.on.ca/eforms/eConsult/>. This web page can be added to your favourite folder on your web browser to facilitate logging into eConsult in the future.
- If you haven't logged into a SharePoint site before, you should expect this yellow bar to appear at the top of your browser screen:

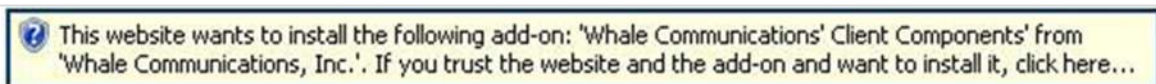


Figure 1a: ActiveX Pop-up

- Right click on this bar.
- Click "Install ActiveX" and follow the prompts that allow ActiveX to install. When prompted, select "Trust this site ALWAYS" for future convenience.
- If you do not see the yellow bar above and instead see the screen below, then you likely do not have the necessary permissions to install ActiveX.

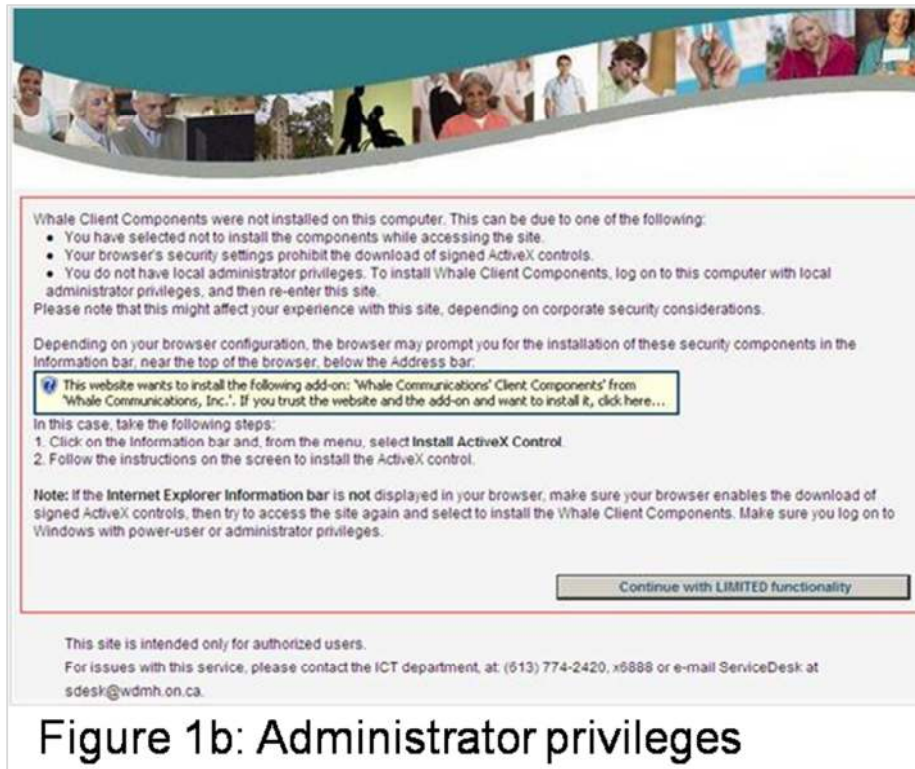



Figure 1b: Administrator privileges

- If this screen appears:
 - Contact your organizations' service desk
 - Ask your service desk representative to go into your computer with administrative rights and allow the ActiveX installation.
 - In the meantime, you may click on "Continue with LIMITED functionality" on the bottom right corner of your screen. This will not affect any of the eConsult applications.
- If you are successful in downloading ActiveX, the following screen should appear



Please provide the following:

User Name:

Password:

Language:

You are accessing this site from a computer running Microsoft Windows XP, Service Pack 2 (SP2) or higher. Internet Explorer is configured by default to block popups. In order to be able to receive inactivity timeout notifications and other warnings from this site, it is recommended that you configure your browser to allow popups from this site.

This site is intended only for authorized users.
For issues with this service, please contact the ICT department, at: (613) 774-2420, x6888 or e-mail ServiceDesk at sdesk@wdmh.on.ca.

Figure 1c: Login screen

- Enter your pre-defined **User Name**, **Password**, and **Language** and select the **Submit** button. (Your User Name will be in this format: john.smith).
- You will be required to change your **Password** when you use the application for the first time.
- Your new password must have at least **eight (8) characters** including:
 - One uppercase letter
 - One lowercase letter; and
 - A number or symbol
- Keep your username and password in a secure location.

- If you are logged on, but not actively using the site for approximately 10 minutes, the system will log you out. Login again with your username and password.
- If you exceed three attempts to log on, this screen will appear:

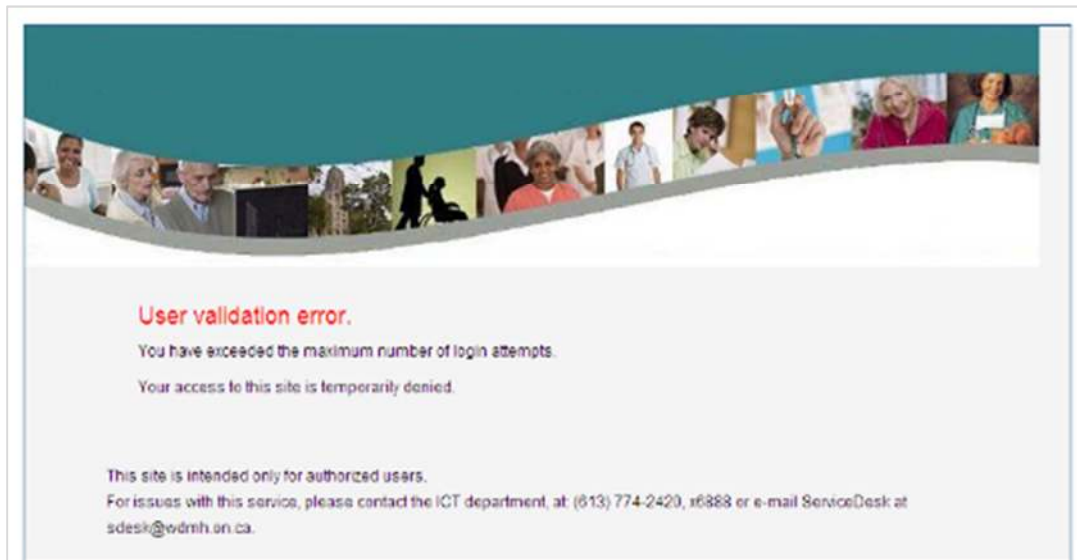


Figure 1d: Exceed maximum number of login attempts

- Close your current browser window, wait a few seconds and open a new session.
- Re-enter your login information.

2. Opening eConsult form

- Once logged in, the **eConsult** homepage will be displayed.
- Under the heading entitled: “**eConsult forms needing my attention**”. Click on **eConsult form** marked **New!**

eConsult

This Site: eConsult

Documents

Home

Discussion

Useful Documents

Winchester District Collaboration Site

Link to logout

My completed eConsult forms

Name

Full Patient Name

Form State

To create a new item, click "New" or "Upload" above. There are no items to show in this view of the "eConsult Forms" document library.

eConsult forms needing my attention

Name

Full Patient Name

Created By

Form State

renee.lafleur2010-10-22T092407

Case 1, Test

Renee Lafleur

Specialist: In Progress

eConsult forms waiting for requester feedback

Title

Full Patient Name

Created By

Form State

To create a new item, click "New" or "Upload" above. There are no items to show in this view of the "eConsult Forms" document library.

Supporting Documents

Name

Participant Consent

E-consult Specialist Training Manual v. 1.1

E-consult Specialist Cheat Sheet v.2.0

E-consult Primary Care Provider Cheat Sheet v.2.0

Welcome!

For questions or assistance with this module, please contact Renée Lafleur by e-mail or by telephone at (613) 562-6262 x 1542.

Announcements

Key changes to the eConsult form!

10/21/2010 11:35 AM

by Renee Lafleur

We would like to announce that a new eConsult form will be published this afternoon (Thursday, October 21st).

The list of key changes has been provided for your reference. After its publication, the new form will apply to any new econsults...

Actualités eConsult en français!

10/21/2010 10:44 AM

by Renee Lafleur

Nous avons maintenant traduit notre bulletin mensuel, L'express eConsult en français!

Pour y accéder, cliquez sur ECONSULT EXPRESS - Champlain BASE Project Newsletter au bas de votre page d'accueil sous la rubrique Supporting Documents.

Figure 2: e-consult Homepage

3. Completing an eConsultation: Step by Step Instructions

- Complete the form by filling all required information, Step by Step. The mandatory fields are marked by a red star (*).
- Text boxes that are greyed-out are read-only to prevent any loss of data. The information typed by the Primary Care Practitioner will appear in blue, including their eConsult request (Figure 3a).
- **Step 1 - Date:** The date that this eConsult was initiated appears at the top. Please verify that it is the correct date.
- **Step 2 – Physician Information:** The Primary Care Practitioner's contact information is filled.
- **Step 3 – Patient Information:** Please read patient's information. Any additional information that is relevant for you to provide an informed recommendation can be viewed in the text box at the bottom of the section. You may also access any relevant documents by clicking on the document name in the light blue box identified with a paper clip.

State: Specialist: In Progress Version 3.51								
<h1 style="margin: 0;">e-Consultation Pilot Project</h1>								
<p>NOTE: -The system will log you out after 20 minutes of inactivity - you can save your information at any point by clicking on the save button -It may be necessary to submit twice, the form will automatically close when the form has been successfully submitted.</p>								
Specialist								
Date the Request was Submitted: October 22, 2010								
Primary Care Provider Information								
<p>Tel: Fax:</p> <p>Email:</p>								
Patient Information								
<table border="1" style="width: 100%; border-collapse: collapse; background-color: #f0f0f0;"> <tr> <td style="text-align: center;">26 \ 02 \ 1992</td> <td style="text-align: center;">Male</td> <td style="text-align: center;">Test</td> <td style="text-align: center;">Case1</td> </tr> <tr> <td style="text-align: center;">Date of birth (dd/mm/yyyy)</td> <td style="text-align: center;">Gender</td> <td style="text-align: center;">Given Name</td> <td style="text-align: center;">Surname</td> </tr> </table>	26 \ 02 \ 1992	Male	Test	Case1	Date of birth (dd/mm/yyyy)	Gender	Given Name	Surname
26 \ 02 \ 1992	Male	Test	Case1					
Date of birth (dd/mm/yyyy)	Gender	Given Name	Surname					
<p>The requester also has provided the following information concerning the patient.</p> <p style="color: blue;">My patient has the following allergies...</p>								
<p>Attached files:</p> <table style="width: 100%;"> <tr> <td style="border: 1px solid black; padding: 5px; text-align: center;"> Click here to attach a file </td> <td style="border: 1px solid black; padding: 5px; text-align: center;"> Click here to attach a file </td> <td style="border: 1px solid black; padding: 5px; text-align: center;"> Click here to attach a file </td> <td style="border: 1px solid black; padding: 5px; text-align: center;"> Click here to attach a file </td> </tr> </table>	Click here to attach a file	Click here to attach a file	Click here to attach a file	Click here to attach a file				
Click here to attach a file	Click here to attach a file	Click here to attach a file	Click here to attach a file					

Figure 3a: e-consult form

- **Step 4 – Specific Question:** The specific question, as posed by the requester can be viewed in the text box of Figure 3b.

Specific Question from Primary Care Provider

The requester has posed the following question:

This is my consultation request

The requester may have also attached the following documents concerning the additional information that was requested.

Click here to attach a file

Click here to attach a file

Click here to attach a file

Click here to attach a file

Figure 3b: e-consult form

- **Step 5 – Specialist response:** If you have all the necessary information to make an informed recommendation, select **NO** from the drop-down menu and proceed.
- **Step 6 - Recommendation:** When making your recommendation, please include (if applicable) the following elements:
 - Suggestion for possible treatments (i.e. how to optimize current treatment or recommending an alternative approach).
 - Suggestion of tests and recommendation according to test results (i.e. after completing Test A and if you have a certain result, proceed with Test B or request a face-to-face referral).

Specialist Response

Do you require additional information before generating an informed recommendation?
No

If the answer is **NO**, please proceed with **Recommendation**

Recommendation should include the following elements (if applicable):

- Reason for recommendation
- Suggestions for possible treatments (i.e. How to optimize current treatment; Recommending an alternative approach to the problem)
- Suggestions for tests and recommendations according to the results of the test (i.e. Prescribe test X. If results are positive/negative, proceed with treatment Y/Z or request patient referral)

Please type recommendation in the space provided below (field will automatically adjust to amount of text).

A clearly formulated recommendation will assist the Primary Care Provider to improve patient care.

Save

Figure 3c: e-consult form

- Please select **YES** if you require any additional information to assist you to make an informed recommendation. Specify the information that is required, including information about:
 - Medical or social history
 - Allergies
 - Lifestyle questions about the patient
 - Laboratory, imaging or radiology reports

Specialist Response

Do you require additional information before generating an informed recommendation? Yes

If the answer is **YES**, please type your request in the space provided below (field will automatically adjust to amount of text).

Requests for additional information may include:

- Medical or social history
- Allergies
- Lifestyle questions (i.e. nutrition, exercise)
- Laboratory, radiology or imaging results

A clearly formulated question will assist the Primary Care Provider in providing the necessary information.

Save

Figure 3d: e-consult form

- You may wish to attach any templates or existing documents in order to request the Primary Care Practitioner to complete any tests or try certain treatments before being able to request a referral (optional).

Would you like to include attachment(s) that you feel would be beneficial to the Primary Care Provider? (optional). Yes

Attach files here and use the text box below to identify each file that is uploaded:

Click here to attach a file Click here to attach a file

Figure 3e: e-consult form

- **Step 7 – Referral:** If you wish to recommend a referral for this patient, please select **YES** from drop-down menu and please type the reason for recommending a referral in the space provided (Figure 3f).
- If a referral is not advised for the patient, select no in the drop-down list and continue with the eConsult.

Referral

Is a referral advised for the patient? Yes ▼

If the answer is **YES**, please type the reason for recommending a referral in the space provided below (field will automatically adjust to amount of text). If you would like the PCP to consider referring the patient to you, you could also attach an electronic copy of your standard referral form to your response above.

Save

Figure 3f: e-consult form

- **Step 8 – Consultant Information:** Your contact information is automatically entered. Please ensure that your information is correct.
- **Step 9 – Consultant Feedback:** Please select the timeframe necessary to complete the eConsult. The eConsult team will monitor the amount of time it takes to complete the form and calculate the stipend for your services accordingly. If you required more than 20 minutes to complete this eConsult, please provide a reason (i.e. research time).

Referral

Is a referral advised for the patient? No ▼

Consultant Information

Please ensure that your contact information is correct.

specialist.test Specialist Test
User ID Consultant Name

123 specialist road specialistville Ontario specialistcode
Street Address City/Municipality Province Postal Code

6135552222 6135552220 rlafleur@bruyere.org
Telephone Facsimile E-Mail

Feedback

How much time did you spend working on this particular e-consult? Fewer than 10 mins ▼

This information will be helpful in determining the usefulness and efficiency of the e-consult process and will enable us to calculate the stipend for your services.

Save and Continue Working Save and Close Save and Send

Note: If upon the first 'Save and Close' or 'Save and Send' the form does not close and redirect to the previous page, please click again.

Figure 3g: e-consult form

4. Notifications

- Please note the date this eConsultation was created at the top of the form (Figure 3a). You should try to respond to all eConsultations within **7 days**.
- A notification email will be sent to the desired email address when:
 - An additional question is posed or additional information is required.
 - A referral which has been suggested by you is accepted.
- You may wish to **Save and Continue** this eConsult, **Save and Close** to submit at a later time or you may wish to **Save and Send** eConsult.
- You may access a saved eConsult by going to the eConsult homepage under the heading “**eConsult forms needing my attention**”. Click on the desired form, which is identified by the date of creation under the “**Name**” column (See Figure 2, p. 8).

5. Additional information

- Once the eConsult form is viewed by the primary care practitioner, he/she has the option of posing an additional question or request clarification on the recommendation provided.
- You will receive a notification email, in which you may click on the link to open the eConsult form (Figure 5a).

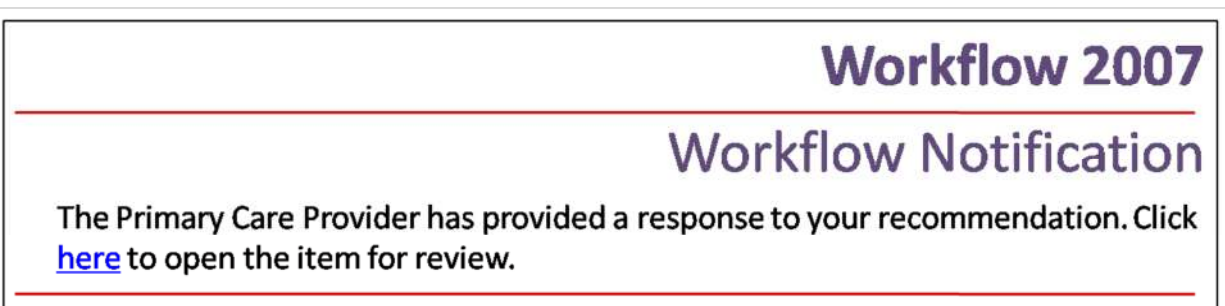


Figure 5a: Email notification

- To view the additional question, scroll below the original question (and the documents that were initially attached). All text typed in by the Primary Care Practitioner will appear in blue font.

Specific Question from Primary Care Provider

The requester has posed the following question:

This is my consultation request

The requester may have also attached the following documents concerning the additional information that was requested.

Click here to attach a file Click here to attach a file Click here to attach a file Click here to attach a file

The requester has asked the following question(s):

This is my second question...

Figure 5b: Additional question

- You may wish to **SAVE** this eConsult and submit at a later time or you may wish to **SAVE** and **SEND** eConsult.
- You may access a saved eConsult by going to the eConsult homepage under the heading “**eConsult forms needing my attention**”. Click on the desired form, which is identified by the date of creation under the “**Name**” column (See Figure 2, p. 8).

6. Referral accepted by the Primary Care Practitioner

- You may have recommended a referral for a patient when:
 - You first viewed the eConsult.

- After reviewing the additional information provided by the Primary Care Provider.
- After reviewing your recommendation for a referral, the Primary Care Practitioner may choose to accept and close the eConsult.
- You will receive an email notification that the eConsult is closed.
- In this case, the Primary Care Practitioner will need to schedule a face-to-face referral through their usual referral pathways.

7. Referral declined by the Primary Care Practitioner

- After reviewing your recommendation for a referral, the Primary Care Practitioner may choose to decline a face-to-face referral, but must provide a reason.
- The Primary Care Practitioner may still choose to pose an additional question or may also choose to close eConsult.
- An email notification will be sent with the status of the eConsult.

8. End of study survey

- Once the eConsult project is complete (March 2011), you will receive an email notification alerting you to complete an online survey.
- As the eConsult project is still in its proof of concept phase, it is important for the research team to receive feedback to ensure that we keep improving the process.

e-Consultation End of Study Specialist Survey

Please read and then answer each question carefully.
Thank you for your participation.

1. Please select the option that best reflects your level of satisfaction.

A. With respect to the e-Consultation process...

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	n/a
I found the e-consultation process helpful to delivering care to PCPs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E-consultations are a feasible way to improve patient care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The e-consultation process was a faster way to provide advice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Compared to the current consultation referral system, an e-consultation system has the potential for me to save time.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The e-consultation process can be integrated into my clinic workflow without difficulty	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The e-consultation process improved the relationship I have with PCPs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I was comfortable providing advice through an e-consultation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Figure 8a : End of study survey

Most of the time I had enough information to answer the referral question	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The e-consultation process should be expanded	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SharePoint has facilitated the e-consultation process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SharePoint was user friendly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Please type in your response in the spaces provided below. Text box will adjust to amount of text.						
A. What changes would you suggest for the e-consultation process/service?						
<div></div>						
B. What barriers do you envision for other specialists to participate in an e-consultation service?						
<div></div>						
C. Please provide any further comments/feedback on the e-consultation service.						
<div></div>						
<p>Click Send to submit survey</p> <p><input type="button" value="Send"/></p> <p>Thank you for your feedback.</p>						

Figure 8b : End of study survey

9. Troubleshooting tips

Issue	
	The application is not opening.
Possible Solutions	
	<ul style="list-style-type: none">• Verify that your internet connection is working.• Verify that your browser permits pop-ups. In your browser toolbar go to Tools > Pop-up Blocker > Turn off Pop-up Blocker.• You may be asked to install Active-X.

Issue	
	I cannot logon.
Possible Solutions	
	<ul style="list-style-type: none">• Ensure you are entering the correct username and/or password. Your User Name should be in the following format: firstname.lastname. Confirm with the eConsult support team if necessary.• Ensure caps lock is off. Passwords are case sensitive.• If you attempted to logon 3 times and failed (i.e. entered the wrong username and/or password 3 times) your account will be locked. You need to contact the eConsult support team and have your account unlocked.

Issue	
	I cannot open a new eConsult form.
Possible Solutions	
	<ul style="list-style-type: none">• Ensure that the eConsult homepage is displayed in your browser.• Click on “Create an eConsult” on the left hand side of the screen. See Opening an eConsult on page 2 and follow the step-by-step instructions on page 3.• If you still have trouble opening a new eConsult form, contact the eConsult support team.

Issue	
	I cannot open an existing eConsult form.
Possible Solutions	
	<ul style="list-style-type: none"> You may access a saved eConsult by going to the eConsult homepage under the heading “eConsult forms needing my attention”. Click on the desired form, which is identified by the date of creation under the “Name” column (See Figure 2, p. 5). You may only select a form if it is written in red or marked New! If the form is written in black, it means that the eConsult has yet to be assigned OR the Primary Care Practitioner has not sent a response.

10. eConsult support

Hotline
Please follow the automated instructions. The following questions are necessary for the support team to assess your technical difficulty properly and respond in a timely manner.
Dial: (613) 774-6536 Greeting: Welcome to the LHINWorks technical support hotline. To report your issue, answer the following questions. After answering each question, please press #. <ol style="list-style-type: none">1. First, what is your name?2. Next, what is your number and e-mail address in which to reach you at?3. Next, what organization do you work for?4. Next, what is your role within the organization?5. Next, what is the site you are trying to access?6. Next, what is the issue you are experiencing?

Email
Please type eConsult Support in the Subject box.
Address: sdesk@wdmh.on.ca When describing your problem, please include the following elements into your inquiry: <ol style="list-style-type: none">1. First, what is your name?2. Next, what is your number and e-mail address in which to reach you at?3. Next, what organization do you work for?4. Next, what is your role within the organization?5. Next, what is the site you are trying to access?6. Next, what is the issue you are experiencing?

Thank you for using eConsult