

Background

Access to specialty advice remains a barrier in the Canadian Health Care system. Over the last decade, novel solutions have emerged that aim to harness our increased connectivity in order to address barriers to care access. Two such technologies are electronic consultation (eConsult) and electronic referral (eReferral):

- **eConsult:** a secure, online platform allowing primary care providers (PCPs) and specialists to communicate asynchronously (i.e. not in real time) about a patient's care. PCPs may gain advice allowing them to treat the patient without initiating a face-to-face specialist visit.
- **eReferral:** a system, often integrated into an electronic medical record, that automates the referral process, and may or may not include eConsult capabilities.

During the eConsult/eReferral National Forum held on November 1, 2018, a group of PCPs, specialists, decision-makers, and patients from across Canada met to discuss issues affecting eConsult's spread and scale across Canada. One session focused on identifying key factors to primary care adoption of eConsult and eReferral for sustained utilization.

Discussion Highlights

The following considerations emerged from the Forum regarding primary care adoption for sustained utilization of eConsult and eReferral:

1) Strategies for effective Primary Care engagement

- **Utilize champions who will actively advocate for eConsult/eReferral services.** These persons must have the right personality and leadership skills, enjoy teaching, be willing to contribute, and be someone PCPs consult for advice on best practices and available tools.
- **Capitalize on relationships with governing bodies.** Organizations such as regional health authorities and academic organizations are optimal to facilitate access to clinics and PCPs to engage with regarding the eConsult/eReferral services. They could also provide a channel for integrating these services into orientation material and curriculum for PCPs.
- **Facilitate training for participating PCPs.** Developing educational resources and creating opportunities for hands on instruction, such as one-on-one training, on-site support, and regular group webinars where questions can be answered, were highlighted as important to adoption.
- **Engage patients.** Raising awareness of these services through educational materials and informing or reminding patients that eConsult/eReferral may benefit them was suggested.
- **Leverage Specialist Physicians** to encourage PCPs to use eConsult/eReferral services. A suggested strategy included providing a document for specialist to fax to PCPs' offices when a referral was made that would have been more appropriate for an eConsult.
- **Promote eConsult/eReferral at meetings and conferences** to increase awareness of these services, to remind PCPs and specialists of the benefits of these services, and to inform them of the variety of cases that are appropriate to use for eConsult.
- **Address remuneration.** Adequate compensation for PCPs was identified as an important enabler to facilitate use of the eConsult/eReferral services.

2) Optimizing integration of eConsult and eReferral into current workflow practices

The added time associated with learning and adopting new technologies pose significant barriers to technology adoption despite the value these services offer. eConsult and eReferral need to be integrated into existing workflows in a way that mitigates the barriers to adherence and minimizes possibility of burnout from added work for PCPs. Suggestions included:

- **Clarifying the value added for PCPs** by illustrating the value that tools such as eConsult and eReferral could bring to them in different contexts.
- **Demonstrating optimal workflow** and showing how eReferral and eConsult add to supporting the workflow on a systemic level.
- **Promoting a delegate model**, where referrals are managed by referral clerks on behalf of the PCPs and as such minimize the administrative burden on the PCPs.

3) Assessing regional needs

There are barriers unique to different regions that hinder adoption of eConsult/eReferral services. These should be assessed and remedied on a regional level.

- **Scope of practice** within each region impacts the value of eConsult/eReferral to PCPs. For example, Nurse Practitioners may find eConsults less valuable because the ability to action the specialist advice may be out of their scope of practice in certain provinces.
- **Parameters of referrers** should be considered based on regional needs. For example, while it is important to make sure that the family physician is not removed from the circle of care, a specialist practicing in a remote area may need to refer to a specialist practicing in an urban area.

4) Keeping informed of competing or complementary initiatives addressing access

Environmental scans of current health care practices, processes and protocols in different regions was identified as important for 1) understanding what other types of digital tools or parallel programs are out there addressing access, and 2) avoiding overloading the PCPs at which these programs are directed.

Summary and Recommendations

The following strategies were identified as key to maintaining PCP engagement and sustainability:

- **Make the platform easy to use:** *“having a platform that’s easy to use,[...] have timesavers embedded into the platform, into the service, [...] would facilitate people using the system and the platform.”*
- **Appropriate remuneration:** *“if people are adequately compensated, they may use the platform more.”*
- **Leverage champions with specific qualities:** *“the right personality, the right leadership, [...] like to teach [...] already involved in knowing and identifying other teachers and other people that are willing to contribute.”*
- **Employ effective communication strategies to increase awareness:** *“the website, the newsletters, the conferences, attending conferences of primary care provider representing the initiative and the newspapers and the newsletters [...] communications that would target specialist and/or patients [...] making the awareness of eConsult greater.”*
- **Conduct environmental scans:** *“to identify all of the either complementary or competing initiatives that are in the world, so we don’t overwhelm PCPs.”*
- **Clarify the added value for PCPs and workflows:** *“what is it for me [...] when I’m a family physician or nurse practitioner [...] greater documentation around what is the extra time, or what is the impact on the true workflow of the physician.”*