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**

**START**

- Open the "eConsult-New" progress note in PointClickCare

**Prepare supporting documents, if requested**

- Open eConsult through the OTN Hub and request a new Consult

- Select the referring physician or nurse practitioner

- Select the Model (BASE or Specific Provider) and the specialty group or provider to be consulted

- Enter resident information and the provider’s question. Attach supporting documents

- Submit the case on behalf of the provider

**Update Provider with Specialist Response and Close the Case**

**Receive notification of specialist response**

- Copy specialist response into a new “eConsult-Follow Up” progress note and notify provider of response

**If applicable, enter the provider’s response to specialist into the eConsult portal**

**Email provider the Close Out Survey Form**

- Transfer the provider’s responses into the Close Out Survey in the eConsult portal on the OTN Hub

- Close the case

**END**
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”.

**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.

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**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.

**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”.

![Image of a progress note in PointClickCare](https://www.1.pointclickcare.com/care/chart/jpn/newpnm.jsp?ESOLpnmid=1451617&ESOLclientid=35953)
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.

```plaintext
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.

The 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 your 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.
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 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.