

# EMR eConsult 2.1

## Requirements

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# 1. INTRODUCTION

## 1.1 Document Overview

This document provides the information necessary to integrate the provincial eConsult service into an EMR Offering to meet the functional and non-functional requirements.

## 1.2 EMR Specification Scope

### 1.2.1 In Scope

- Functional and non-functional requirements to implement the provincial eConsult service within an EMR Offering.

### 1.2.2 Out of Scope

- Business processes to onboard EMR Offerings and users to connect to the provincial eConsult service.
- Specific information relating to accessing eConsult outside the EMR Offering.

### 1.2.3 Prerequisites

To streamline the user experience, maintain security and safeguard privacy, an EMR Offering must adhere to the EMR EHR Connectivity Specification before connecting to the provincial eConsult service.

## 1.3 Related Document and Reference

The following table lists all documents that should be reviewed to understand the concepts and information related to or referenced within this document.

DOCUMENT NAME	VERSION	PUBLICATION DATE
eConsult Interface Specification (Ontario Telemedicine Network, 2019) <a href="https://otn.ca/api-support/#econsult">https://otn.ca/api-support/#econsult</a>	2.1	2019-03-29
EMR EHR Connectivity Specification (OntarioMD, 2019) <a href="https://www.ontariomd.ca/emr-certification/emr-specification/library">https://www.ontariomd.ca/emr-certification/emr-specification/library</a>	1.1	2019-04-01

## 2. EMR REQUIREMENTS

This section consists of the EMR functional requirements for EMR eConsult.

Support:

**M** = Mandatory. EMR offerings certified for this specification **MUST** support this requirement

**O** = Optional. EMR vendors **MAY** choose to support this requirement in their certified EMR offering

Status:

**N** = New requirement for this EMR Specification version

**P** = Previous requirement

**U** = Updated requirement from the previous EMR Specification version

**R** = Retired requirement from the previous EMR Specification version

OMD #:

Unique identifier that identifies each requirement within OntarioMD's EMR Requirements Repository

### CONFORMANCE LANGUAGE

The following definitions of the conformance verbs are used in this document:

- **SHALL/MUST** – Required/Mandatory
- **SHOULD** – Best Practice/Recommendation
- **MAY** – Acceptable/Permitted

The tables that follow contain column headings named: 1) "Requirement," which generally contains a high-level requirement statement; and 2) "Guidelines," which contains additional instructions or detail about the high-level requirement. The text in both columns is considered requirement statements.

## 2.1 Manage eConsult

This section defines EMR requirements to manage eConsults from a patient record and to manage all eConsults associated with the EMR user. Detailed EMR requirements related to the create, view, search, print, and update eConsult features are defined in subsequent sections of this document.

**Important:** All the requirements in the table below apply to referrers, referrer delegates, respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS01.01	The EMR Offering MUST have the ability to perform eConsult functions from within the patient record.	<p>The following actions MUST be available, specifically from within the patient record:</p> <ul style="list-style-type: none"> <li>a) Create a new eConsult</li> <li>b) View all eConsults associated with that patient</li> <li>c) Search for eConsult(s)</li> <li>d) Re-assign an eConsult</li> <li>e) Print an eConsult</li> <li>f) Associate/Disassociate an eConsult to a patient</li> <li>g) Update an eConsult</li> </ul> <p>Each action is described in more detail in subsequent sections within this document.</p>	M	U
ECS01.02	The EMR Offering MUST have functionality to perform eConsult functions related to an EMR user (referrer, or respondent).	<p>The following actions MUST be available, outside of any patient record.</p> <ul style="list-style-type: none"> <li>a) Create a new eConsult</li> <li>b) View all eConsults associated with the EMR user.</li> <li>c) Search for eConsult(s)</li> <li>d) Re-assign an eConsult</li> <li>e) Print an eConsult</li> <li>f) Associate/Disassociate eConsult to a patient</li> <li>g) Update an eConsult</li> </ul> <p>Each action is described in more detail in subsequent sections within this document.</p>	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS01.03	The EMR Offering MUST store eConsult metadata when associated with the patient record within the EMR system.	<p>The following eConsult metadata MUST be stored within the EMR system for all eConsults associated to a patient record within the EMR system:</p> <ul style="list-style-type: none"> <li>a) eConsult ID</li> <li>b) Referrer name</li> <li>c) Respondent name</li> <li>d) Creation date</li> <li>e) eConsult subject</li> </ul> <p>The above information MUST be logged for auditing purposes following College of Physician and Surgeons of Ontario (CPSO) requirements.</p>	M	U

## 2.2 Create eConsult

**Important:** All the requirements in the table below apply only to referrers and referrer delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.01	The EMR Offering MUST be able to create a new eConsult.	<p>The EMR Offering MUST present of all the following eConsult fields in order to create a new eConsult:</p> <ul style="list-style-type: none"> <li>a) Referrer name (Refer to ECS02.02)</li> <li>b) Referrer Delegate (Refer to ECS02.03)</li> <li>c) eConsult delivery model (ECS02.04)</li> <li>d) Respondent selection (Refer to ECS02.05)</li> <li>e) Patient information (Refer to ECS02.06)</li> <li>f) eConsult subject (Refer to ECS02.07)</li> <li>g) eConsult notes (Refer to ECS02.08)</li> <li>h) File attachments (Refer to ECS02.13)</li> </ul> <p>The EMR user MUST be able to submit an eConsult only if all mandatory fields are provided. Refer to the “Assign eConsult” section for an explanation of the different delivery models.</p> <p>The EMR user MUST be allowed to submit an eConsult only once all mandatory fields are provided.</p> <p>Once an eConsult is submitted by a referrer, the eConsult MUST be submitted to the provincial eConsult service. Refer to “Create eConsult” in the eConsult Interface Specification.</p> <p><b>Note:</b> Once an eConsult is successfully submitted to the provincial eConsult service, the submitted information cannot be modified. However, both the referrer and respondent can append additional notes to the eConsult. Once an eConsult is successfully submitted, the provincial eConsult service will assign and return a unique eConsult ID to the EMR Offering. An eConsult may be referred to as a “Case” in other documentation or context. A respondent may be called a “recipient” in other documentation or context.</p>	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.02	The EMR Offering MUST automatically populate the referrer name when a referrer creates an eConsult.	<p>Where the EMR user is the referrer (i.e., the EMR user is not a referrer delegate), the referrer’s first and last name MUST be automatically populated in the referrer name field.</p> <p>The referrer name MUST NOT be editable.</p>	M	U
ECS02.03	The EMR Offering MUST provide functionality to select a referrer when a referrer delegate creates an eConsult.	<p>The EMR Offering MUST have functionality for a referrer delegate to select a referrer name from a selection of eligible referrer delegates.</p> <p>The list of referrers MUST consist of the list of referrers for that respective referrer delegate from the provincial eConsult service, and display the first and last name of each result returned. Refer to “Search Delegators” in the eConsult Implementation Guide for more information on retrieving a list of eligible delegators assigned to an EMR user.</p> <p>It is acceptable and recommended that the referrer name be automatically populated where a referrer delegate has only one referrer delegate.</p> <p>This functionality MUST NOT require a referrer (who is not a delegate) to make a selection. It is recommended that this functionality not be available to referrers who are not delegates.</p> <p><b>Note:</b> A referrer delegate may have one or more referrers on whose behalf they act.</p>	M	U
ECS02.04	The EMR Offering MUST provide a selection of eConsult delivery models when creating an eConsult.	<p>The EMR Offering MUST provide the following mandatory eConsult delivery model values to choose from when creating an eConsult:</p> <ul style="list-style-type: none"> <li>a) Specific Provider or Group</li> <li>b) BASE Managed Specialty</li> </ul> <p>It is mandatory for the EMR user to select one of the above values prior to submitting an eConsult. Refer to Assign eConsult.</p> <p><b>Note:</b> The delivery model can be modified by an EMR user after the eConsult is submitted. Refer to the “Re-Assign eConsult” section for more details.</p>	M	N
ECS02.05	The respondent selection MUST be available when creating an eConsult.	The delivery model chosen will determine the fields and information required to enact a respondent selection.	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		<p>The EMR Offering MUST prompt for only the relevant fields for the selected delivery model.</p> <p>Refer to the “Assign eConsult” section to determine the specific requirements to support each delivery model.</p>		
ECS02.06	<p>The EMR Offering MUST automatically populate the patient information when creating an eConsult.</p>	<p>The EMR Offering MUST automatically populate each of the following patient information fields, if available from within the EMR system, when creating an eConsult:</p> <ul style="list-style-type: none"> <li>a) First name</li> <li>b) Middle name</li> <li>c) Last name</li> <li>d) Date of birth</li> <li>e) Gender</li> <li>f) Health card number (HCN)</li> </ul> <p>A validation of the following fields MUST be performed, where it is provided by the EMR Offering:</p> <ul style="list-style-type: none"> <li>a) HCN</li> <li>b) Date of birth</li> </ul> <p>If the HCN is unavailable, the EMR Offering MUST provide a means to alternatively accept an optional insurer number. Where no insurer number is provided by the EMR user, a value of ‘N/A’ MUST be used to submit the eConsult to indicate that neither the HCN nor the insurer information is available. Refer to the “Coverage” resource in the eConsult Interface Specification for more details.</p> <p><b>Note:</b> HCN may be referred to as the Ontario Health Insurance Plan (OHIP) in other documents or context.</p>	M	U
ECS02.07	<p>The EMR Offering MUST have functionality to allow the EMR user to provide an eConsult subject when creating an eConsult.</p>	<p>The eConsult subject is mandatory and MUST not be blank when submitted to the provincial eConsult service.</p> <p><b>Note:</b> The eConsult subject is textual information for the EMR user to provide a high-level description of an eConsult. Refer to the</p>	M	N

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		<p>“ReferralRequest.url extension”, or “title of the case” in the “ReferralRequest Profile (Create Case)” in the eConsult Interface Specification for more details relating to the eConsult subject.</p> <p><b>Note:</b> eConsults in the OTNhub do not support an eConsult subject. As a result, eConsult subjects cannot be defined nor displayed in the OTNhub.</p>		
ECS02.08	The EMR Offering MUST provide functionality to allow the EMR user to enter eConsult notes when creating an eConsult.	<p>The eConsult notes MUST display the entire correspondence history between the referrer and respondent.</p> <p>All additional updates to an eConsult note MUST be logged with a date and time stamp, action and the name of the respondent, referrer or delegate depending on who created the entry. The entries MUST be displayed in the eConsult form.</p>	M	P
ECS02.09	The EMR Offering MUST provide the ability for an EMR user to include existing patient record data in the EMR Offering to an eConsult note.	<p>The EMR user MUST be able to include clinical data from the patient record as selected by the referrer. At a minimum, the eConsult note MUST be able to include any of the following:</p> <ul style="list-style-type: none"> <li>• Cumulative Patient Profile (CPP) data</li> <li>• Lab reports</li> <li>• Progress notes (encounter notes)</li> <li>• Consultation notes (received)</li> <li>• External reports</li> </ul>	M	U
ECS02.10	The EMR Offering MUST provide an ability to cancel the eConsult while creating an eConsult.	<p>The EMR user MUST be able to cancel an eConsult at any point before it is submitted to the provincial eConsult service.</p> <p>Any stored copies of the eConsult draft within the EMR Offering MUST also be deleted when an eConsult is cancelled.</p>	M	P

### 2.2.1 Assign eConsult (Delivery Models)

EMR users can assign eConsults using one of two different delivery models:

#### a) The BASE Managed Specialty

This model allows EMR users to submit an eConsult for a given specialty or subspecialty (e.g., Pediatric Cardiology). eConsults submitted through this model are managed by eConsult service administrative staff who assess and assign to the nearest available specialist.

**b) Specific Provider or Group**

This model allows EMR users to choose a specific specialist (respondent) by name, or self-organized group of respondents (e.g., a local group of Orthopedic specialists). eConsults submitted through this model are sent directly to the selected respondent or group of respondents, who will respond based on their availability.

**Important:** All requirements in the table below apply only to referrers and referrer delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.11	<p>If the EMR user selects the Specific Provider or Group delivery model to assign an eConsult, the EMR Offering MUST be able to search the eConsult service’s directory of provisioned specialists and specialty groups when selecting a respondent during the creation of an eConsult.</p>	<p>The eConsult creation form MUST retrieve the list of available respondents and respondent groups from the provincial eConsult service.</p> <p>Refer to “Search Recipient” in the eConsult Interface Specification to retrieve a list of assignees pertaining to the Specific Provider or Group delivery model.</p> <p>The eConsult creation form MUST also have a search function that enables an EMR user to search for a specialist or a specialty group. A keyword search that requires at least three characters MUST be supported.</p> <p>The EMR Offering MUST provide an alternative “Advanced Search” for specialist/specialty groups by the following characteristics in the specialist/specialty group profile (where applicable):</p> <ul style="list-style-type: none"> <li>• Salutation (e.g., Dr.)</li> <li>• First name</li> <li>• Last name</li> <li>• Specialty</li> <li>• Subspecialty</li> <li>• Special interest</li> <li>• City</li> <li>• Local Health Integration Network (LHIN)</li> </ul> <p>a) Search results MUST be retrieved from the provincial eConsult service. Refer to “Search Recipient” in the eConsult Interface Specification.</p>	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		<ul style="list-style-type: none"> <li>b) Search results that match the keywords entered or advanced search criteria MUST be presented to the EMR user with specialist/group availability.</li> <li>c) The EMR user MUST be able to select one specialist or specialist group from the search result.</li> <li>d) The EMR Offering MUST display information on Specialist Conditions, Telemedicine Service, Restrictions for the Specific Provider, and Specialty Group Conditions, Description for the Group, if this information is returned as part of the search results.</li> </ul>		
ECS02.12	<p>If the EMR user selects the BASE Managed Specialty delivery model to assign an eConsult, the EMR Offering MUST be able to search the list of BASE managed specialties and sub-specialties in order to select where to send the eConsult during the eConsult creation.</p>	<ul style="list-style-type: none"> <li>a) The eConsult creation form MUST prompt the EMR user to select from a standardized taxonomy for Specialty Category and Specialty Option.</li> <li>b) After the EMR user has selected a value from the standardized taxonomy, the EMR Offering will initiate a search to find BASE Managed Specialties that are providing services for the selected specialty and subspecialty. For details, refer to “HealthcareService” in the eConsult Interface Specification.</li> <li>c) The results of the “Search Healthcare Service” will be presented based on matched criteria.</li> <li>d) The EMR Offering MUST display information on Specialist Conditions, Telemedicine Service, and Restrictions if this information is returned as part of the search results. Refer to the eConsult Interface Specification.</li> <li>e) The EMR user MUST be able to select a specialty and subspecialty from the search results.</li> </ul> <p>For the data set that will be returned in search results please refer to the “Search HealthcareService” in the eConsult Interface Specification. If a specialty group is selected, the eConsult will be assigned to a responder by an assigner from the BASE managed service.</p>	M	P

## 2.2.2 Attach File to eConsult

**Important:** All requirements in the table below apply to referrers, referrer delegates, respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.13	The EMR Offering MUST have functionality to allow the EMR user to attach files to a new eConsult.	<p>When creating an eConsult, the EMR user MUST have the ability to attach files to that eConsult for submission to the provincial eConsult service.</p> <p>The EMR Offering MUST NOT limit the number of files that can be attached per eConsult.</p> <p>Refer to “File Operations” in the eConsult Interface Specification for implementation details for attaching files to, and retrieving attached files from, an eConsult AND for “Supported File Types” for the list of accepted file types supported.</p> <p><b>Note:</b> Once an eConsult is submitted, attachments cannot be edited, modified, or deleted.</p> <p><b>Note:</b> There is no limit set by the provincial eConsult service on the number of files that can be attached to an eConsult. However, the maximum supported size per file is currently 500 megabytes (MB), which may change in the future.</p>	M	P

## 2.2.3 eConsult Draft

When an eConsult is created and while it is being drafted, the eConsult exists within the EMR Offering. Once an eConsult has all the desired and necessary information, it may be submitted to the provincial eConsult service.

**Important:** All requirements in the table below apply only to referrers and referrer delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.14	The EMR Offering MUST have functionality to save an eConsult in a draft state, prior to submitting the eConsult.	<p>The EMR Offering MUST have the ability save current eConsult information within the EMR Offering at any point prior to successfully submission of the eConsult to the provincial eConsult service.</p> <p>Any EMR user authorized to view the patient record MUST be able to view eConsult drafts for that patient.</p> <p>EMR users authorized to edit the patient record MUST be able to edit draft eConsults if they are a delegate of the referrer that created the draft eConsult.</p>	M	P
ECS02.15	The EMR Offering MUST have functionality to delete an eConsult draft.	<p>The EMR Offering MUST provide the ability to delete an eConsult at any point prior to submitting an eConsult to the provincial eConsult service (e.g., when creating or drafting an eConsult).</p> <p><b>Note:</b> Refer to “Cancel eConsult” in the “Update eConsult” section of this document for the functionality to delete or cancel an eConsult <i>after</i> it has been submitted.</p>	M	U
ECS02.16	The EMR Offering MUST have functionality to edit an eConsult draft.	<p>The EMR user MUST be able to retrieve an eConsult that is in a draft state, continue to further edit it, then submit that eConsult once all mandatory fields are populated.</p> <p>This includes the ability to switch the delivery model (Specific or BASE Managed as well as the name of the intended respondent or group within a model, without having to re-enter previously entered data in other parts of the draft eConsult.</p>	M	P

### 2.3 Submit eConsult

Once an eConsult has all the desired and necessary information, it may be submitted to the provincial eConsult service, at which point, the eConsult persists within the provincial eConsult service.

**Important:** All requirements in the table below apply only to referrers and referrer delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS03.01	The EMR Offering MUST be able to submit an eConsult draft.	<p>The EMR Offering MUST allow submission of the eConsult to the provincial eConsult service.</p> <p>The EMR Offering MUST validate that all information required to successfully submit an eConsult to the provincial eConsult service has been obtained.</p> <p>Once successfully submitted, the eConsult draft MUST be removed from the EMR Offering.</p> <p>Refer to “ReferralRequest Profile (Create Case)” in the eConsult Interface Specification for details to submit an eConsult.</p>	M	U
ECS03.02	The EMR Offering MUST store the metadata about a successfully submitted eConsult.	<p>The following eConsult metadata MUST be stored within the EMR system for all eConsults associated to a patient record within the EMR system:</p> <ol style="list-style-type: none"> <li>eConsult ID</li> <li>Referrer name</li> <li>Respondent name</li> <li>Creation date</li> <li>eConsult subject</li> </ol> <p>The above information MUST be logged for auditing purposes following College of Physician and Surgeons of Ontario (CPSO) requirements.</p>	M	N

## 2.4 View eConsult

**Important:** All requirements in the table below apply to referrers, referrer delegates, respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS04.01	The EMR Offering MUST display all eConsults associated to the EMR user, or a specific patient.	<p>The EMR Offering MUST present all eConsults associated with the EMR user or selected patient upon user’s request, and display the following data:</p> <ul style="list-style-type: none"> <li>Patient name</li> <li>Referrer name</li> <li>Respondent name</li> <li>eConsult status</li> </ul>	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		<ul style="list-style-type: none"> <li>• eConsult submission date</li> <li>• eConsult subject</li> </ul> <p>For delegates, an associated eConsult includes any eConsult submitted by, or for their delegator(s).</p> <p>Requiring the EMR user to place their cursor (hover) over an eConsult to display any of the above data DOES NOT satisfy this requirement.</p> <p>The most recent data for an eConsult, as maintained by the eConsult service, MUST be displayed.</p> <p><b>Note:</b> The “eConsult status” may be referred to as the “eConsult state” in other documentation or context.</p>		
ECS04.02	The EMR Offering MUST be able to display all supported eConsult attachments.	The EMR Offering MUST be able to open any attachments associated with an eConsult. For list of supported File format refer to the eConsult Interface Specification.	M	P
ECS04.03	The EMR Offering MUST provide the ability to save a copy of a completed eConsult to the associated patient record within the EMR Offering.	<p>The steps of saving a copy of the completed eConsult to the associated patient record within the EMR Offering MUST be automated and not require the EMR user’s interaction.</p> <p>The copy MUST include all information from the eConsult.</p>	M	P
ECS04.04	The EMR Offering MUST support sorting of a list of eConsults.	<p>The EMR Offering MUST allow an EMR user to be able to order the list of eConsults by each of the following criteria:</p> <ul style="list-style-type: none"> <li>• Patient name</li> <li>• Referrer name</li> <li>• Respondent name</li> <li>• eConsult status</li> <li>• eConsult submission date</li> <li>• eConsult subject</li> </ul>	M	P
ECS04.05	The EMR Offering MUST support filtering of a list of eConsults.	<p>The EMR Offering MUST allow an EMR user to be able to filter the list of eConsults, including any combination of the following criteria:</p> <ul style="list-style-type: none"> <li>• Patient name</li> <li>• Referrer name</li> </ul>	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		<ul style="list-style-type: none"> <li>Respondent name</li> <li>eConsult status</li> <li>eConsult submission date</li> </ul>		
ECS04.06	The EMR Offering MUST be able to display a list of all eConsults that require action by the EMR user.		M	P
ECS04.07	When displaying an eConsult or list of eConsults, the EMR Offering MUST retrieve the most current information from the eConsult service.	<p>The EMR Offering MUST retrieve the most current state of an eConsult for display.</p> <p>Similarly, the most current result MUST be displayed when providing a list of relevant eConsults.</p> <p>It is acceptable to refresh an eConsult, or list of eConsults through either a manual process (e.g., when an EMR user drills down on a specific eConsult from a list of eConsults) or an automated process (e.g., a refresh occurring at a configurable, predefined time interval).</p> <p>When refreshing a list of eConsults, the EMR Offering MUST maintain the same sort order that may have been previously defined by the EMR user.</p>	M	P
ECS04.08	The EMR Offering MUST visually distinguish an eConsult that is associated with a patient record.	A visual indicator MUST be presented to an EMR user that clearly identifies that an eConsult is associated with a specific patient record within the EMR Offering.	M	P

## 2.5 Search for eConsult

**Important:** All requirements in the table below apply to referrers, referrer delegates, respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS05.01	The EMR Offering MUST have the functionality to search for eConsult(s).	<p>The EMR user MUST be able to search for eConsults by one or more of the following eConsult criteria:</p> <p>a) Range of date that eConsult(s) were submitted</p>	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		b) eConsult status c) Referrer d) Respondent e) eConsult Flag  The EMR Offering MUST provide the list of all eConsults matching the search criteria, and the ability to view any eConsult in that list.		
ECS05.02	The maximum number of search results to list per page MUST be user-configurable.	The maximum number of search results listed per page that an EMR user can configure MUST set to 200 results.  The EMR Offering MUST indicate the total number of search results returned from a search.  Refer to “Pagination” in the eConsult Interface Specification.	M	P

## 2.6 Print eConsult

**Important:** All requirements in the table below apply to referrers, referrer delegates, respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS06.01	The EMR Offering MUST provide functionality to print an eConsult.	A printed eConsult MUST contain the following information about the eConsult: <ul style="list-style-type: none"> <li>• Patient name</li> <li>• Patient date of birth</li> <li>• Patient gender</li> <li>• HCN and Version if available</li> <li>• Consultation details and transcriptions</li> <li>• Identify any attachments associated with the eConsult</li> </ul>	M	P

## 2.7 Associate/Disassociate eConsult with Patient Record

**Important:** All requirements in the table below apply to referrers, referrer delegates, respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.01	The EMR Offering MUST provide functionality to associate an eConsult to an existing EMR patient record.	<p>The following eConsult metadata MUST be stored within the EMR system for all eConsults associated to a patient record within the EMR system:</p> <ul style="list-style-type: none"> <li>a) eConsult ID</li> <li>b) Referrer</li> <li>c) Respondent</li> <li>d) Patient name</li> <li>e) eConsult submission date</li> <li>f) eConsult subject</li> </ul> <p>A unique identifier maintained by the EMR Offering MAY be stored in place of the patient name, if available.</p> <p>The above information MUST be logged for auditing purposes following College of Physician and Surgeons of Ontario (CPSO) requirements.</p>	M	U
ECS07.02	The EMR Offering MUST provide functionality to disassociate an eConsult from an existing patient record in the EMR Offering.	Disassociating or removing an eConsult from a patient record MUST be logged for auditing purposes following College of Physician and Surgeons of Ontario (CPSO) requirements.	M	P

## 2.8 Update eConsult

Depending on the eConsult status, different update actions are available to the EMR user. This section defines EMR Offering requirements in respect to updating eConsults, including all relevant actions such as re-assign, close, cancel, provide eConsult, request more information, provide more information, provide feedback, add note, attach file and decline eConsult.

**Note:** Any update actions, once submitted to the provincial eConsult service, are final and cannot be edited.

### 2.8.1 Attach File to Existing eConsult

**Important:** All requirements in the table below apply to referrers, referrer delegates, respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS08.01	The EMR Offering MUST have functionality to attach files to an existing eConsult.	<p>The EMR user MUST have the option to attach files to an existing eConsult (that has already been submitted to the provincial eConsult service).</p> <p>The EMR Offering MUST NOT limit the number of files that can be attached per eConsult.</p> <p>Refer to “File Operations” in the eConsult Interface Specification, for implementation details to attach files to, and retrieve attached files from an eConsult AND to “Supported File Types” for the list of accepted file types supported.</p>	M	U

### 2.8.2 Add Note to eConsult

**Important:** All requirements in the table below apply to referrers, referrer delegates, respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS08.02	The EMR Offering MUST have functionality to allow the EMR user to add notes to an existing eConsult.	<p>An EMR user may wish to add an eConsult note at any time before the eConsult is completed.</p> <p>An eConsult note MUST be submitted to the eConsult service. For more information, refer to “Add Note” in the eConsult Interface Specification.</p>	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Only respondents and respondent delegates MUST be prompted to enter time spent to be submitted along with this function. Refer to “Report Time Spent”.		

### 2.8.3 Request Clarification

**Important:** All requirements in the table below apply only to referrers and referrer delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS08.03	The EMR Offering MUST have functionality for a referrer to request clarification after an eConsult is provided by the respondent.	Upon submitting a request for more information, all eConsult information entered in the form MUST be submitted to the provincial eConsult service. For more information, refer to “Request Clarification” in the eConsult Interface Specification.	M	P

### 2.8.4 Provide More Information

**Important:** All requirements in this table apply only to referrers and their delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS08.04	The EMR Offering MUST have functionality to provide more information for an existing eConsult.	Upon submitting a request for more information, all eConsult information entered in the form MUST be submitted to the provincial eConsult service. Refer to the eConsult Interface Specification.	M	P

### 2.8.5 Complete eConsult

**Important:** All requirements in the table below apply only to referrers and referrer delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS08.05	The EMR Offering MUST have functionality to allow the EMR user to complete an eConsult after a consult is provided.	Upon selecting complete eConsult, all eConsult changes MUST be submitted to the provincial eConsult service. For more information, refer to “Complete eConsult” in the eConsult Interface Specification.  <b>Note:</b> Once an eConsult is completed, it cannot be re-opened.	M	U
ECS08.06	The EMR Offering MUST present the survey questions upon completing an eConsult.	The survey questions MUST be presented when a referrer or referrer delegate upon completion of an eConsult.  Survey questions MUST be retrieved from the provincial eConsult service and EMR user responses MUST be submitted to the provincial eConsult service. Refer to “Key Performance Indicators (Survey Questions)” in the eConsult Interface Specification.  <b>Note:</b> The survey may contain multiple questions which require free-text and/or pre-defined responses for the EMR user to input. Questions may change in future.  <b>Note:</b> Both the set of survey questions (ECS08.06) and the question for the Report Time Spent (ECS08.07) can be retrieved in the same “Questionnaire” resource in the eConsult Interface Specification.	M	U

### 2.8.6 Report Time Spent

The Report Time Spent function provides a means for respondents and respondent delegates to capture the time spent to act upon an eConsult request. This information may be used for reporting, billing or compensation purposes within the provincial eConsult service.

**Important:** All requirements in the table below apply only to respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS08.07	The EMR Offering MUST prompt for the amount of time spent to act on an eConsult.	The EMR Offering MUST provide the ability for a respondent or respondent delegate to submit the amount of time spent as part of the following functions:  a) Provide Consult b) Request More Information	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		<p>c) Add Note to eConsult d) Decline eConsult</p> <p>To enter the amount of time spent, the EMR Offering MUST prompt the EMR user with a predefined list of available options to choose from:</p> <ul style="list-style-type: none"> <li>• 0 minutes</li> <li>• 1-5 minutes</li> <li>• 6-10 minutes</li> <li>• 11-15 minutes</li> <li>• 16-20 minutes</li> <li>• 21-25 minutes</li> <li>• 26+ minutes</li> </ul> <p>Where “26+ minutes” is selected by the EMR user, the EMR Offering MUST additionally prompt for a specific whole number value for the number of minutes spent.</p> <p>The EMR Offering MUST submit the option chosen by the EMR user to the provincial eConsult service. Where and only where the option of “26+ minutes” is chosen, the specific integer value MUST also be submitted.</p> <p><b>Note:</b> Both the set of survey questions (ECS08.06) and the question for the Report Time Spent (ECS08.07) can be retrieved in the same “Questionnaire” resource in the eConsult Interface Specification.</p>		

### 2.8.7 Cancel eConsult

**Important:** All requirements in the table below apply only to referrers and referrer delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS08.08	The EMR Offering MUST have functionality to cancel a submitted eConsult.	<p>Upon cancelling an eConsult, changes MUST be submitted to the provincial eConsult service.</p> <p>For more information, refer to the “Return Case” and “Return eConsult” in the eConsult Interface Specification.</p>	M	U

### 2.8.8 Re-Assign eConsult

**Important:** All requirements in the table below apply only to referrers and referrer delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS08.09	The EMR Offering MUST have functionality to re-assign an eConsult to a different specialist or specialty group.	Re-assigning an eConsult MUST consist of cancelling the existing eConsult, then drafting a new eConsult with the initial eConsult case data prepopulated by the EMR Offering. All fields in the form MUST be editable.	M	P

### 2.8.9 Request More Information

**Important:** All requirements in this table apply only to respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS08.10	The EMR Offering MUST have functionality to request more information prior to responding to an eConsult.	<p>If the respondent requires more clarification from the referrer, the referrer can engage in a dialogue with the respondent. Respondents can request for more information for an eConsult.</p> <p>Upon submitting a request for more information, all eConsult changes MUST be submitted to the provincial eConsult service. For more information, refer to “Request More Info (Specialist)” in the eConsult Interface Specification.</p> <p>Respondents and respondent delegates MUST be prompted to enter time spent to be submitted along with this function. Refer to “Report Time Spent”.</p>	M	U

### 2.8.10 Decline eConsult

**Important:** All requirements in the table below apply only to respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS08.11	The EMR Offering MUST have functionality to decline an eConsult.	Upon declining an eConsult, all eConsult changes MUST be submitted to the provincial eConsult service. For more information, refer to “Return eConsult (Specialist)” in the eConsult Interface Specification.	M	P
ECS08.12	The EMR Offering MUST prompt for a reason in order to decline an eConsult.	<p>One of the following reasons for declining MUST be selected by the EMR user:</p> <ul style="list-style-type: none"> <li>a) <b>Incorrect specialty</b></li> <li>b) <b>Not available</b></li> <li>c) <b>Other</b></li> </ul> <p>In addition, the EMR Offering MUST provide the functionality for the EMR user to optionally include comments in free-form text. If the reason of “Other” is selected, then a comment by the EMR user is required.</p> <p>Respondents and respondent delegates MUST be prompted to enter time spent to be submitted along with this function, where the selection is either “Incorrect specialty” or “Other”. There MUST be no prompt to the user if “Not available” is selected and a value of zero minutes is submitted to the provincial eConsult service for the time spent. Refer to “Report Time Spent”.</p> <p><b>Note:</b> The “decline eConsult” function may be called a “return case” in other documentation or context.</p>	M	U

### 2.8.11 Provide Consult

**Important:** All requirements in this table apply only to respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS08.13	The EMR Offering MUST have functionality to allow the EMR user to provide a consult within an eConsult.	An eConsult MUST accept only one consult. An accepted consult MUST be submitted to the provincial eConsult service. For more information, refer to “Provide Consult (specialist/respondent)” in the eConsult Interface Specification.	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Respondents and respondent delegates MUST be prompted to enter time spent to be submitted along with this function. Refer to “Report Time Spent”.		

### 2.8.12 Reply to Clarification Request

**Important:** All requirements in the table below apply only to respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS08.14	The EMR Offering MUST provide functionality to respond to clarification requests after an eConsult is provided.	Responses to an eConsult request for clarification MUST be submitted to the provincial eConsult service. For more information, refer to “Reply (specialist)” in the eConsult Interface Specification.	M	P

### 2.8.13 eConsult Flag

**Important:** All requirements in the table below apply only to respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS08.15	The EMR Offering MUST display the eConsult Flag value in all respondent workflows.	The EMR Offering MUST retrieve and display the eConsult Flag value for all eConsults, including identifying when an eConsult Flag value is not assigned or present.  Refer to the “otn.flag” in the eConsult Interface Specification for information relating to the eConsult Flag.	M	P
ECS08.16	The EMR Offering MUST provide the ability for an EMR user to set the eConsult Flag in all respondent workflows.	The EMR user MUST have the ability to assign or modify an eConsult Flag to any one of the following pre-defined case sensitive values: <ul style="list-style-type: none"> <li>• EDUCATION</li> <li>• RESEARCH</li> <li>• OTHER</li> </ul>	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		To clear an eConsult Flag, a value of “NO FLAG” MUST be used. Any other eConsult Flag values are invalid and MUST NOT be accepted nor submitted by the EMR Offering. Refer to the “otn.flag” in the eConsult Interface Specification for information relating to the eConsult Flag.		
ECS08.17	The EMR Offering MUST include the eConsult Flag value when printing an eConsult.	The EMR Offering MUST include the most current eConsult Flag value associated with an eConsult any time the eConsult is printed.	M	U
ECS08.18	The EMR Offering MUST allow searching for eConsults by the eConsult Flag value.	The search function for eConsults MUST include criteria to be able to search by eConsult Flag values.  For additional eConsult search requirements, refer to “Search for eConsults” section.	M	P

## 2.9 Error Handling

**Important:** All requirements in the table below apply to referrers, referrer delegates, respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.01	The EMR Offering MUST be able to perform error handling in response to any error messages generated by the provincial eConsult service.	Refer to “OperationOutcome Resource” in the eConsult Interface Specification for error, warning or informational messages generated by the provincial eConsult service.	M	P
ECS09.02	All error messages received from the provincial eConsult service MUST be logged within the EMR Offering.	The EMR Offering MUST have functionality to allow an EMR user to review the logged error messages.  It is acceptable to restrict access to specific EMR user(s).	M	P

## 2.10 Reporting

**Important:** All requirements in the table below apply to referrers, referrer delegates, respondents and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS10.01	The eConsult Activity Report request MUST be filtered by a valid “eConsult Submitted on” date range.	<p>The EMR Offering MUST retrieve the eConsult Activity Report providing a valid user-specified date range (i.e., a “From” date and a “To” date).</p> <p>Mandatory rules when retrieving an eConsult Activity Report:</p> <ol style="list-style-type: none"> <li>Both “From” and “To” dates MUST be populated</li> <li>Both “From” and “To” date MUST NOT accept a future date</li> <li>The “From” date MUST chronologically precede the “To” date</li> </ol> <p>It is optional to prompt the user for a time component of a date value; however, it is mandatory for the EMR Offering to include a time component when retrieving the eConsult Activity Report. As such, a date is defined as either (choose one):</p> <ol style="list-style-type: none"> <li>A date AND time which is provided by the user, or</li> <li>Only a date which is provided by the user, and the EMR Offering populating default times (e.g., where the “From” time inserted is “00:00” and the “To” time inserted is “23:59”) that align with the mandatory rules above.</li> </ol> <p>Refer to “Download Activity Report” in the eConsult Interface Specification.</p> <p>It is acceptable to pre-populate date and/or time values for the user to review and accept or modify accordingly (e.g., pre-populate the “To” date and time to the current date and time).</p>	M	P
ECS10.02	The eConsult Activity Report request MUST be filtered by the eConsult “User Role”.	<p>The EMR Offering MUST retrieve the eConsult Activity Report providing a user-specified valid “User Role”. Valid values are:</p> <ul style="list-style-type: none"> <li>Requester</li> <li>Specialist</li> </ul> <p>A value of “Requester” represents a role of a referrer or referrer delegate. A value of “Specialist” represents a role of a respondent or respondent delegate.</p>	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		In a scenario where a user is a delegate of multiple clinicians, the eConsult Activity Report will return a collective summary of all of their delegators.		