OntarioMD

EMR eConsult 1.0

Overview

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1. INTRODUCTION

1.1 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. It is organized into the following sections:

a) **Business View**: describes the business context and benefits of connecting EMR Offerings to the Provincial eConsult Service; provides a high-level overview of the primary stakeholders and systems involved in helping EMR users access electronic health record (EHR) services from their EMR Offering.
b) **System View**: provides an overview of the systems involved in accessing EHR services.

1.2 Related Documents and References

The following table lists all documents related to, or referenced within this document.

Document Name	Version	Date
eConsult HL7 FHIR Implementation Guide (Ontario Telemedicine Network, 2018)	1.96	2018-05-01
eConsult EMR Integration API Requirements (Ontario Telemedicine Network, 2018)	1.1	2018-04-10

2. BUSINESS VIEW

The Provincial eConsult Service connects physician practices, through certified electronic medical records (EMRs), to the right specialist to inform clinical decisions. The referrer or respondent may also leverage a portal-based eConsult solution to create or respond to the consult in situations when the EMR is not available.[1] This enables timely care for patients, potentially avoiding unnecessary referrals and adverse events that can be experienced with long wait times for a patient to be seen by a specialist.

An eConsult is a secure, electronic communication initiated by a clinician (referrer) to a specialist (respondent) with the goal of informing clinical decisions by enabling a referrer to consult with a specialist for their professional advice or opinion regarding a patient's condition or treatment. An eConsult can involve a simple question (e.g., about a drug dosage) or a more complex question following an initial assessment by the clinician (e.g., asking for a dermatology assessment and providing images of the patient's condition).

[1] For more information on the portal-based eConsult solution, please refer to https://otnhub.ca/patient-care/#econsult.

This dialogue is enabled by the Provincial eConsult Service, which is integrated within the EMR Offerings used by the referrer and respondent. The benefits of the Provincial eConsult Service include faster response times for clinicians to receive specialist advice, reduced wait times for treatment, access to an expansive list of specialists and specialties. This service can also potentially reduce the number of unnecessary specialist referrals across Ontario's health care system.

2.1 eConsult Roles

The following table identifies the individuals, or actors, that play a role in the Provincial eConsult Service.

ROLE	EXAMPLE	FUNCTION
Referrer	Primary care physician (PCP), family physician, nurse practitioner (NP), allied health professional (AHP), medical specialist, etc.	Creates an eConsult to initiate dialogue with a specialist for advice about patient's conditions, symptoms or diagnosis. Receives advice from a responding specialist to an eConsult.
Referrer Delegate* **	Nurse, administrative assistant, worker in primary care clinic office, etc.	Is Authorized by and acts on behalf of their assigned referrer and uses the eConsult Service with similar functions as the referrer. From an EMR user perspective, can perform the same functions as a referrer.
Respondent ** *(also referred to as **Specialist**)*	Medical specialist (e.g., cardiologist, dermatologist, hematologist), etc.	Responds to an eConsult request from a referrer, providing medical advice, relating to a patient's condition, symptoms or diagnosis.
Respondent Delegate* **	Nurse, administrative assistant, worker in specialist clinic, etc.	Is Authorized by and acts on behalf of the respondent and uses the eConsult Service with similar functions as the respondent. From an EMR user perspective, can perform the same functions as a respondent.
Assigner*	eConsult Service administrative staff	Where an eConsult is sent by a referrer, to a *specialty* or Specialty Group (as opposed to a particular *specialist*), the assigner will assign the eConsult to a specific specialist.
eConsult System Admin*	eConsult Service administrative staff	Resolves eConsult workflow issues (e.g., idle/expired eConsults, system notifications, scheduling).
eConsult Business Admin*	eConsult Service administrative staff	Resolves business issues with the eConsult system (e.g. specialist queue management, re-assignment of eConsults).

** These roles are fulfilled by Provincial eConsult Service administrative staff who act behalf of the Provincial Service partners and are identified for reference and context only – they are not roles assignable to EMR users.*

*** A specialist can also be a referrer in the system; in a specialist-to-specialist scenario, a specialist (as a referrer) can send an eConsult to another specialist (as a respondent).*

**** A referrer may assign, at most, one individual as their referrer delegate. The same restriction applies for respondents wishing to assign a respondent delegate. Conversely true, a delegate may only act on behalf of either one referrer, or one respondent.*

Any eConsult functionality available within an EMR Offering that is applicable to a referrer is equally applicable to the referrer's delegate. Similarly, any eConsult functionality within an EMR that is applicable to a respondent is equally applicable to the respondent's delegate.

3. SYSTEM VIEW

Communications between an EMR Offering and the Provincial eConsult Service is accomplished following the eConsult FHIR Implementation Guide and the eConsult EMR Integration API Requirements. Refer to the Related Documents and References section within this document for material on these topics.

3.1 eConsult Actions

A referrer (clinician who initiates an eConsult) and respondent (specialist who provides a consultation) each use their respective EMR Offering as a point of service to manage eConsults to perform actions listed in the table below.

eConsult Action	Applicable to Referrer / Referrer Delegate	Applicable to Respondent / Respondent Delegate
Manage eConsults		
From patient record	Y	Y
From a list view (list of all eConsults) associated to the eConsult user	Y	Y
Create Consult		
Draft eConsult	Y	N
Search respondent	Y	N
Attach patient information	Y	N
Attach file to eConsult	Y	N
Add note to eConsult	Y	N
Submit eConsult	Y	N
View eConsult		
View eConsult	Y	Y
Search eConsult(s)		
Search eConsult(s)	Y	Y
Print eConsult		
Print eConsult	Y	Y
Associate/disassociate eConsult with patient record		
Associate/disassociate eConsult with patient record	Y	Y
Update eConsult		
Attach file to eConsult	Y	Y
Add note to eConsult	Y	Y
Provide more information	Y	N
Request clarification	Y	N
Complete eConsult	Y	N
Provide feedback	Y	N
Cancel Consult	Y	N
Change specialist	Y	N
Request more information	N	Y
Decline eConsult	N	Y
Provide eConsult	N	Y

eConsult Action	Applicable to Referrer / Referrer Delegate	Applicable to Respondent / Respondent Delegate
Self-report time spent	N	Y
Reply to clarification request	N	Y

3.2 eConsult Service Email Notifications

The eConsult service maintains functionality to notify users via email for certain eConsult state changes. Delegates receive all email notifications that their delegators receive. Users can configure email notification preferences through the portal-based eConsult solution. For further details, refer to the eConsult EMR Integration API Requirements. This functionality complements the EMR eConsult requirements and is not meant to substitute them.

3.3 Lifecycle of an eConsult

The table below defines the eConsult states, identifying actions that can be performed by a referrer and respondent throughout the eConsult lifecycle. The table does not represent the fulsome list of all eConsult states – it only identifies the states relevant to the EMR Offering.

eConsult State	Description	Action(s) Available to Referrer/Referrer Delegate	Action(s) Available to Respondent/Respondent Delegate
Draft	This state is triggered when a referrer saves an existing eConsult as a draft for later submission.	Save Draft, Delete Draft, Add Note, Submit eConsult	N/A
Submitted	This state is triggered when a referrer submits an eConsult to the respondent. Note: If an eConsult is sent to a specialty group (as opposed to a specialist), it will be assigned to a specialist who is a member of that specialty group by an assigner. Only then the specialist will be able to perform actions listed in the "action available to respondent" column.	Add Note, Cancel eConsult, Change Specialist	Provide eConsult, Request More Information, Decline eConsult
Assigned	This state is triggered when an eConsult is assigned to a respondent by an assigner.	Add Note, Cancel eConsult	Provide eConsult, Request more information, Decline eConsult
Un-assigned	This state is triggered when an eConsult is unassigned from a respondent by an assigner or when a respondent declines an eConsult.	Cancel eConsult, Change Specialist	N/A
Declined	This state is triggered when a respondent declines an eConsult.	Cancel eConsult, Change Specialist	N/A
Cancelled	This state is triggered when a referrer cancels an eConsult.	Cancel eConsult	N/A

eConsult State	Description	Action(s) Available to Referrer/Referrer Delegate	Action(s) Available to Respondent/Respondent Delegate
More Info Requested	This state is triggered when a respondent requests more information from a referrer.	Provide More Information, Cancel eConsult	Provide eConsult, Add Note, Decline eConsult
More Info Provided	This state is triggered when a referrer provides additional information to a respondent.	Add Note, Cancel eConsult	Provide eConsult, Request More Information, Decline eConsult
Consult Provided	This state is triggered when a respondent provides an eConsult response.	Request Clarification, Complete eConsult	N/A
Clarification Requested	This state is triggered when a referrer asks for clarification after an eConsult is provided.	Add Note	Reply
Replied	This state is triggered when a respondent replies to a referrer's request for clarification after an eConsults is provided.	Request Clarification, Complete eConsult	N/A
Complete	This state is triggered with a referrer indicates that the eConsult case is completed.	Complete eConsult	N/A

The relationships between eConsult states are summarized in the following diagram. Figure 1 - eConsult State Transition Diagram. (Ontario Telemedicine Network, 2018).

Figure 1 - eConsult State Transition diagram

Figure 2 illustrates the full eConsult life cycle.

Figure 2 - eConsult Workflow depicts the full eConsult lifecycle starting from "Draft Case" to "Case Complete". The assigner's actions highlighted in yellow are not applicable to EMR requirements.

3.4 Use Case Model

This Use Case Diagram below depicts a high-level overview of the system features. Each feature is described in more detail with the relevant EMR requirements.

Figure 3 *- eConsult Use Case Model*