EMR eConsult 2.0

Requirements

March 5, 2019

Document Version & Status: 2.0 – Draft for Use

Table of Contents

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 Implementation Guide (Ontario Telemedicine Network) https://otn.ca/api-support/#econsult	2.0.1	2019-02-15

DOCUMENT NAME	VERSION	PUBLICATION DATE
EMR EHR Connectivity Specification (OntarioMD, 2017) https://www.ontariomd.ca/emr-certification/emr-specification/library	1.0	2017-10-23

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 eConsult 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 functionality to manage eConsults from within the patient record.	The following actions MUST be available, specifically from within the patient record. (Each action is described in more detail in subsequent sections within this document). a) Create a new eConsult. Refer to the "Create eConsult" section. b) View all eConsults associated with that patient. Refer to the "View eConsult" section. c) Search for eConsult(s). Refer to the "Search for eConsult" section. d) Print an eConsult. Refer to the "Print eConsult" section. e) Associate/Disassociate an eConsult to a patient rostered within the EMR Offering. Refer to the "Associate/Disassociate eConsult with Patient Record" section. f) Update an eConsult. Refer to the "Update eConsult" section. **Note**: Any change to an eConsult MUST be reflected in the patient record of the EMR Offering.	M	P
ECS01.02	The EMR Offering MUST have functionality to manage all eConsults associated to an eConsult user (referrer, or respondent).	The EMR user MUST be able to perform the following actions. a) Create a new eConsult. Refer to the "Create eConsult" section. b) View all eConsults associated with the EMR user. Refer to the "View eConsult" section. c) Search for eConsult(s). Refer to the "Search for eConsult" section. d) Print an eConsult. Refer to the "Print eConsult" section.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		e) Associate/Disassociate eConsult to a patient rostered within the EMR Offering. Refer to "Associate/Dissociate eConsult with Patient Record" section. f) Update an eConsult. Refer to the "Update eConsult" section. **Note**: Every eConsult change MUST be updated in the list of eConsults.		
ECS01.03	The EMR Offering MUST persist eConsult metadata for eConsults associated with the patient record within the EMR.	The EMR Offering MUST maintain the following eConsult metadata: a) eConsult ID b) referrer c) respondent d) creation date e) eConsult subject **Note**: The eConsult subject is a textual heading for the EMR user to provide a high-level description of an eConsult. It may be referenced as the ReferralRequest.description, or "title" in the ReferralRequest Profile (Create Case) in the eConsult Implementation Guide. eConsult metadata MAY persist in an EMR Offering only when associated with a patient record within the EMR Offering.	M	U

2.2 Create eConsult

An eConsult user can request an electronic consultation from a specific specialist or a specialty group (following the Specific Provider or Group model), or the request can be sent to a regionally-managed specialty (following the Managed Specialty model). This section defines EMR requirements for the creation of an eConsult including all features available to a referrer and refers delegates during eConsult creations such as the ability to attach files, manage draft (e.g. save, edit, delete), and assign an eConsult to a specialist or specialty group. (A respondent cannot create an eConsult.)

The use case model below depicts the create eConsult functionality.

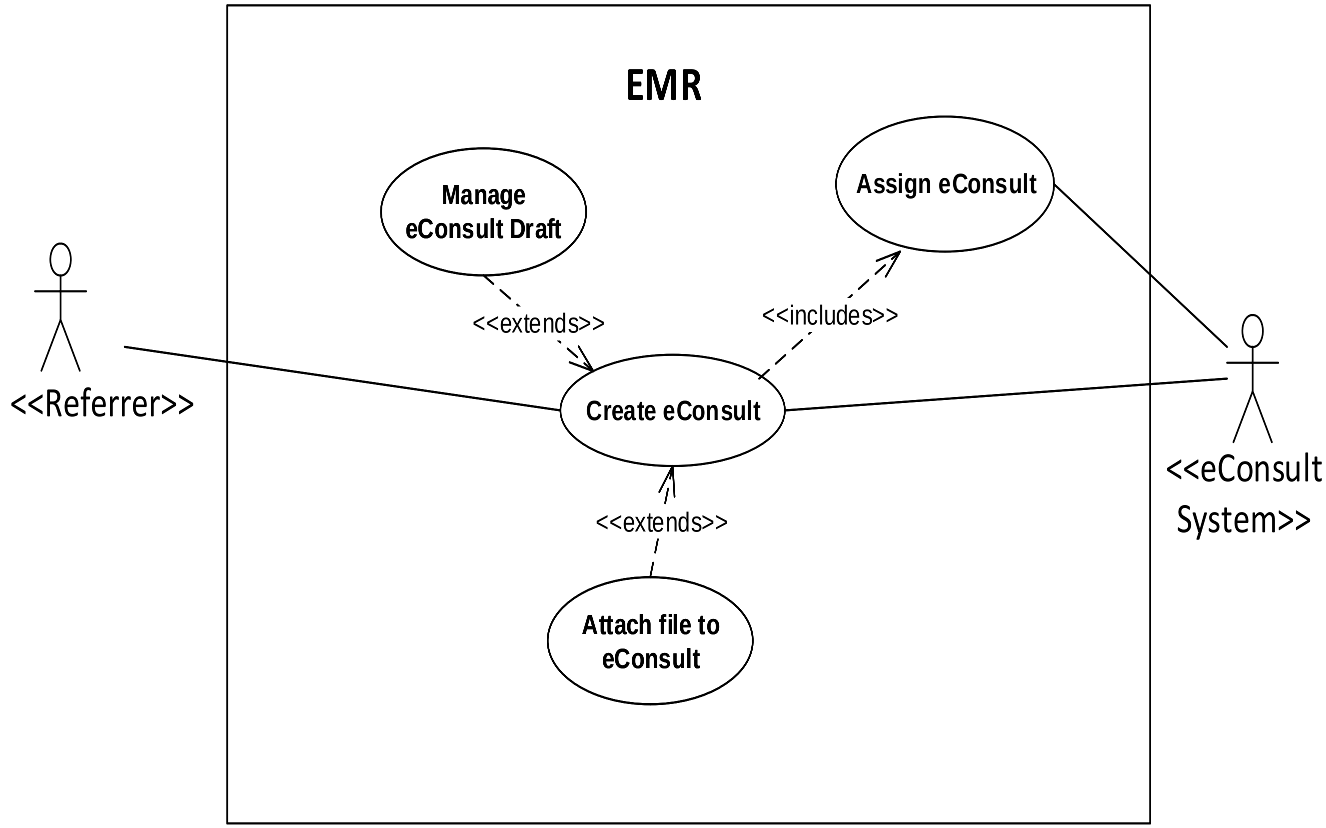

Figure 1 - Create eConsult Use Case

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.	The EMR Offering MUST allow entry of the following eConsult data in order to create a new eConsult: a) eConsult delivery model b) Referrer information c) Specialty selection (specialist, group or region) d) Patient information e) Request clarification f) Optional attachments The EMR Offering MUST present the EMR user with the option to assign the eConsult using either of the two supported eConsult models: 1) Specific Provider or Group 2) BASE Managed Specialty The EMR user MUST be able to submit an eConsult only if all mandatory fields are provided. For more information on mandatory fields, refer to the “Create eConsult” section. Refer to the “Assign eConsult” section for an explanation of the different delivery models. The EMR user MUST be allowed to submit an eConsult only once all mandatory fields are provided. For more information on mandatory fields, refer to the “Create eConsult” section. Once an eConsult is submitted by a referrer, all eConsult information entered in the eConsult sections MUST be submitted to the provincial eConsult service. **Notes**: Once an eConsult is successfully submitted to the provincial eConsult service, eConsult information cannot be modified. However, both the referrer and respondent can add 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.	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.02	Referrer information MUST include the required set of information.	The following set of referrer information MUST be maintained: a) First name b) Last name Referrer information MUST be automatically prepopulated by EMR Offering, and not editable within the eConsult creation form.	M	P
ECS02.03	The recipient section MUST include the required set of information associated with the respective Delivery Model chosen by the referrer.	The recipient selection retrieves the list of available respondents to assign an eConsult. The following set of recipient information MUST be included: a) Salutation b) First name c) Last name d) Specialty e) City f) Address g) Organization Recipient information MUST be automatically populated from information provided by the specialist search results from the eConsult service. For more information on how to search and select a specialist or a specialty group in the eConsult creation form refer to the "Assign eConsult" section.	M	P
ECS02.04	The patient section MUST include the required set of information from within the EMR Offering.	The following set of patient information MUST be maintained and provided by the EMR Offering: a) First name b) Middle name (if available) c) Last name d) Date of birth e) Gender f) Health Card Number (HCN) g) HCN Version Code (if available) h) Indicate should HCN be unavailable All the above fields, unless specified otherwise, are mandatory. Validation of HCN and date of birth MUST be performed by the EMR Offering.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Patient information MUST be automatically prepopulated (if available). If the HCN is not available, the EMR Offering MUST accept another insurer number or an insurer value of ‘N/A’ to indicate that neither HCN nor insurer information is available.		
ECS02.05	The EMR Offering MUST provide an ability for the EMR user to include existing patient record data within the EMR Offering to an eConsult.	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: • Cumulative Patient Profile (CPP) data • Lab reports • Progress notes (encounter notes) • Consultation notes (received) • External reports Any included clinical information MUST be saved in its generated format.	M	U
ECS02.06	The EMR Offering MUST provide the ability for an EMR user to enter details in free form text in the “request details” section of an eConsult creation form.	The request details section is mandatory and therefore, the EMR user MUST be able to enter data in the eConsult subject and eConsult notes. The section MUST display the entire referrer-respondent conversation correspondence history. All additional note entries 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.	M	P
ECS02.07	The EMR Offering MUST provide the ability to cancel the creation of a new eConsult.	The EMR user MUST be able to cancel the creation of an eConsult at any point before it is submitted. Any stored copies of the eConsult draft within the EMR Offering MUST also be deleted when an eConsult is cancelled.	M	P

2.2.1 Assign eConsult

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

1. **The Base Managed Specialty**

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

2. **Specific Provider or Group**

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

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.08	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.	The eConsult creation form MUST retrieve the list of Specific Providers or Groups from the provincial eConsult service. 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. 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): • First name • Last name • Specialty • Sub-specialty • Special interest • City • Local Health Integration Network (LHIN) a) Search results MUST be retrieved from the provincial eConsult service. Refer to "Search Recipient" in the eConsult Implementation Guide. b) Search results that match the keywords entered or advanced search criteria MUST be presented to the EMR user with specialist/group availability.	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		c) The EMR user MUST be able to select one specialist or specialist group from the search result. 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.		
ECS02.09	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.	a) The eConsult creation form MUST prompt the EMR user to select from a standardized taxonomy for Specialty Category and Specialty Option. 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 sub-specialty. For details, please refer to “HealthcareService” in the eConsult Implementation Guide. c) The results of the “Search Healthcare Service” will be presented based on matched criteria. 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 Implementation Guide. e) The EMR user MUST be able to select a specialty and sub-specialty from the search results. f) For the data set that will be returned in search results please refer to the “Search HealthcareService” in the eConsult Implementation Guide. If a specialty group is selected, the eConsult will be assigned to a responder by an assigner from the BASE managed service.	M	N

2.2.2 Attach File to eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.10	The EMR Offering MUST have functionality to attach files to a new eConsult.	The EMR user MUST have the option to create an eConsult with the ability to attach files to that eConsult for submission to the provincial eConsult service. The EMR Offering MUST NOT limit the number of files that can be attached per eConsult. Refer to “File Operations” in the eConsult Implementation Guide, 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. **Note**: Once an eConsult is submitted, the attachments cannot be edited, modified, or deleted.	M	U

2.2.3 eConsult Draft

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.11	The EMR Offering MUST be able to save an eConsult in a draft state.	The EMR user MUST have the ability to create and save the eConsult draft within the EMR Offering. **Note**: eConsult drafts MUST be maintained within the EMR Offering and not saved within the provincial eConsult service (until the eConsult is submitted). Any EMR user authorized to view the patient record MUST be able to view draft eConsults for that patient.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		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.		
ECS02.12	The EMR user MUST be able to delete an eConsult draft.	Upon successful deletion, eConsult MUST be removed from the EMR Offering.	M	P
ECS02.13	The EMR user MUST be able to edit an eConsult draft.	The EMR user MUST be able to retrieve a draft eConsult (that was previously created but not yet submitted), continue to further edit it, then submit that eConsult once all mandatory fields are populated. 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.	M	U
ECS02.14	The EMR user MUST be able to submit an eConsult draft.	Once the eConsult draft is successfully submitted, “Consult API - Create Case” web-service MUST be invoked Once successfully submitted, the eConsult draft MUST be removed.	M	P

2.3 View eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS03.01	The EMR Offering MUST display all eConsults associated to the EMR user, or a specific patient.	The EMR Offering MUST present all eConsults associated with the EMR user or selected patient upon user’s request, and display the following data: • Patient name • Referrer name • Respondent name • eConsult status • eConsult submission date • eConsult subject	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		For delegates, an associated eConsult includes any eConsult submitted by, or for their delegator(s). Requiring the EMR user to place their cursor (hover) over an eConsult to display any of the above data DOES NOT satisfy this requirement. The most recent data for an eConsult, as maintained by the eConsult service, MUST be displayed.		
ECS03.02	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 Implementation Guide.	M	P
ECS03.03	The EMR Offering MUST provide the ability to save a copy of a completed eConsult to the associated patient record within the EMR Offering.	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. The copy MUST include all information from the eConsult.	M	U
ECS03.04	The EMR Offering MUST support sorting of a list of eConsults.	The EMR Offering MUST allow an EMR user to be able to order the list of eConsults by each of the following criteria: • Patient name • Referrer name • Respondent name • eConsult status • eConsult submission date • eConsult subject	M	P
ECS03.05	The EMR Offering MUST support filtering of a list of eConsults.	The EMR Offering MUST allow an EMR user to be able to filter the list of eConsults, including any combination of the following criteria: • Patient name • Referrer name • Respondent name • eConsult status • eConsult submission date	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS03.06	The EMR Offering MUST be able to display a list of eConsults that require action from the eConsult user.		M	P
ECS03.07	When displaying an eConsult or list of eConsults, the EMR Offering MUST retrieve the most current information from the eConsult service.	The EMR Offering MUST retrieve the most current state of an eConsult for display. Similarly, the most current result MUST be displayed when providing a list of relevant eConsults. 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). 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.	M	P
ECS03.08	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

2.4 Search for eConsult

Important: All the 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 have the functionality to search for eConsult(s).	The EMR user MUST be able to search for eConsults by one or more of the following eConsult criteria: a) From date b) eConsult state c) Referrer d) Respondent e) eConsult Flag	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		The EMR Offering MUST provide the list of all eConsults matching the search criteria, and the ability to view any eConsult in that list.		
ECS04.02	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 Implementation Guide.	M	P

2.5 Print eConsult

Important: All the 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 provide functionality to print an eConsult.	A printed eConsult MUST contain the following information about the eConsult: • Patient name • Patient date of birth • Patient gender • HCN and Version if available • Consultation details and transcriptions • Identify any attachments associated with the eConsult	M	P

2.6 Associate/Disassociate eConsult with Patient Record

Important: All the 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 associate an eConsult to an existing EMR patient record.	Only eConsult metadata MUST exist on the EMR Offering once an eConsult has been associated with an EMR patient record. For more information on metadata, refer to the “Create eConsult” section.	M	P
ECS06.02	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

2.7 Update eConsult

Depending on the eConsult state, different update actions are available to the eConsult 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.

2.7.1 Updating eConsult Use Case Model

The following use case model below depicts how an eConsult can be updated by a referrer.

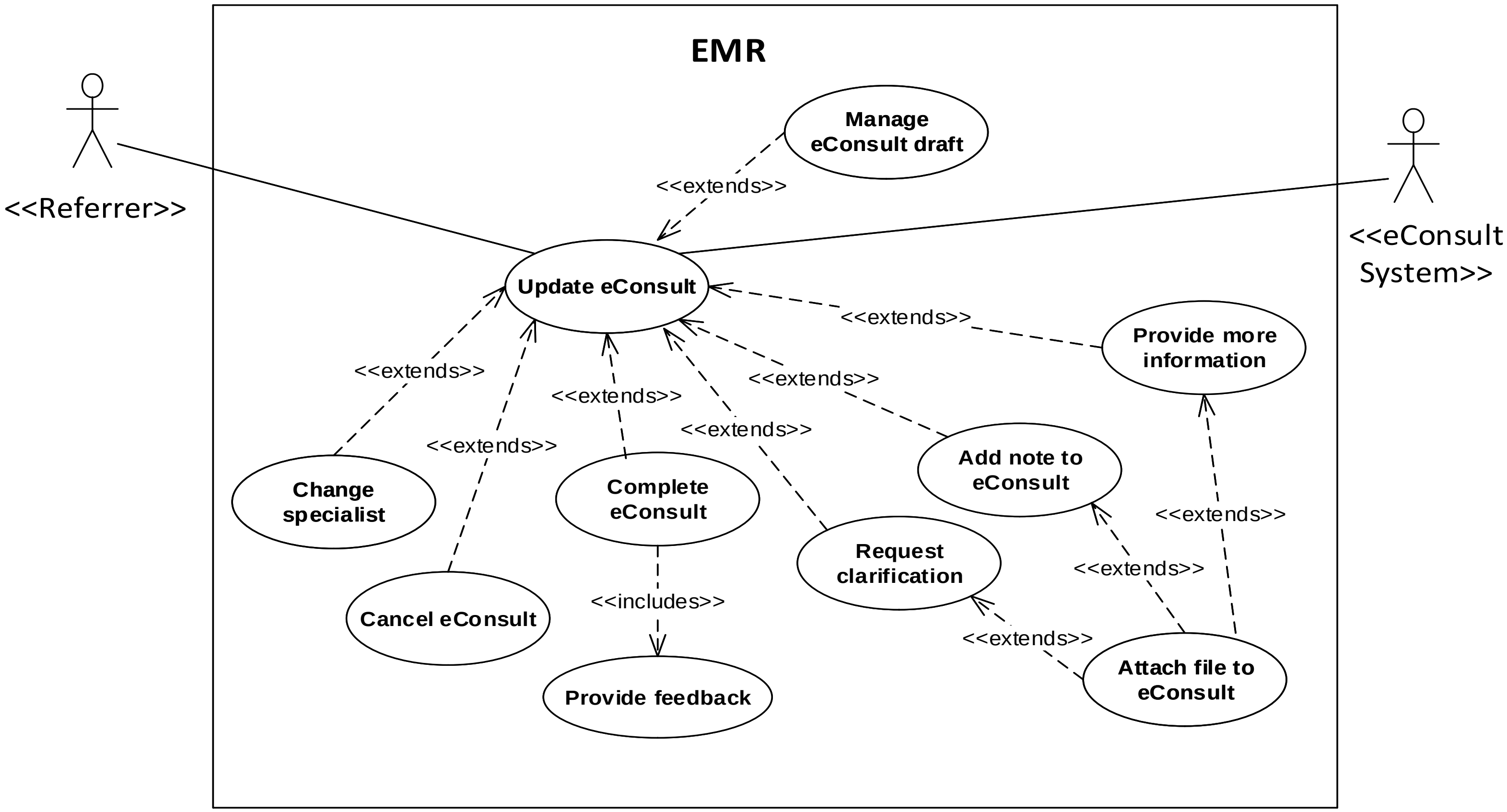

Figure 2- Updating eConsult Use Case

2.7.2 Update eConsult Workflow for Referrer

Figure below depicts the workflow of updating an eConsult from the referrer's perspective.

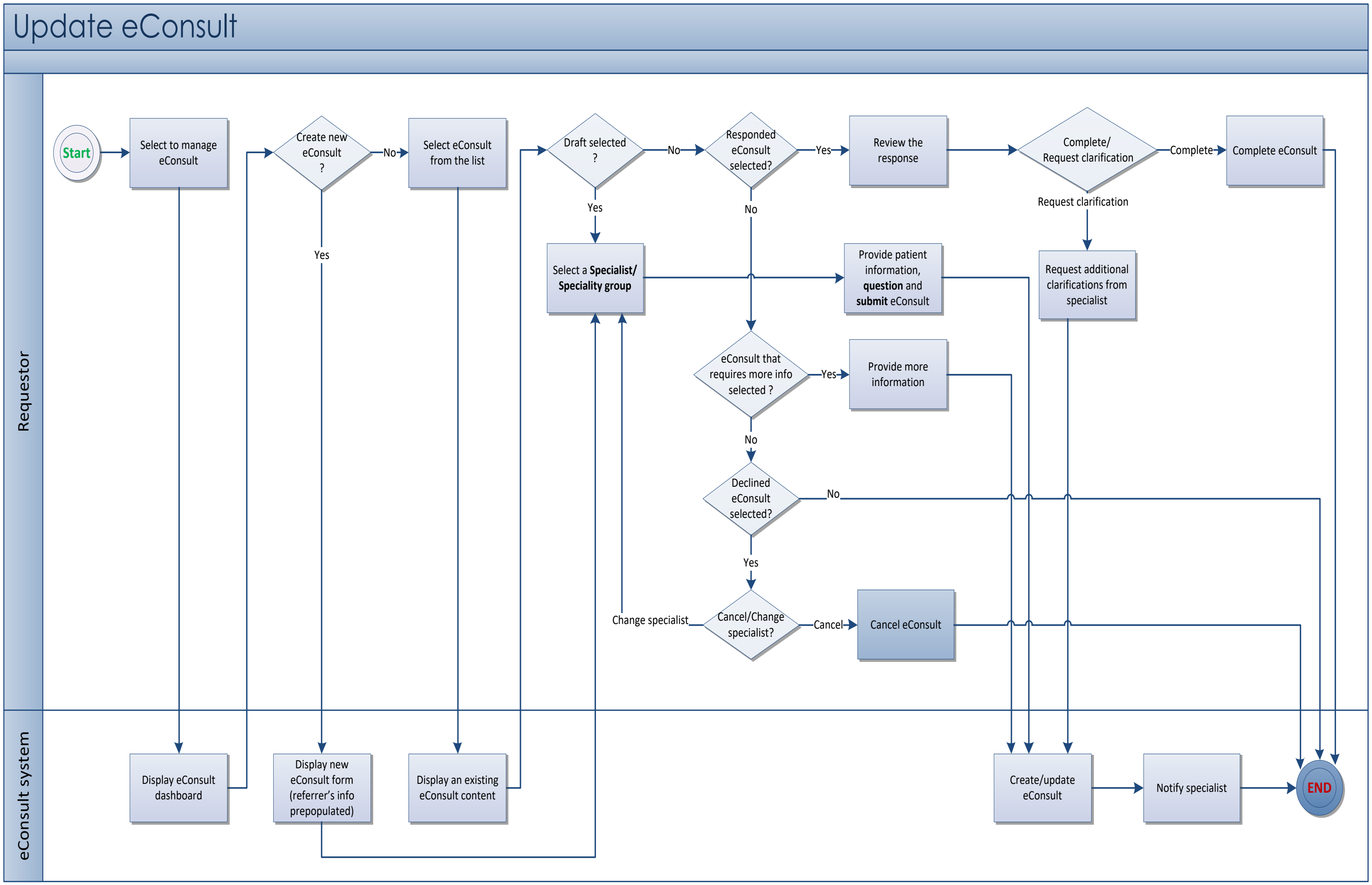

Figure 3- Update eConsult Workflow for Referrer

2.7.3 Updates eConsult Workflow for Respondent

The figure below depicts the workflow of updating an eConsult from the respondent's perspective.

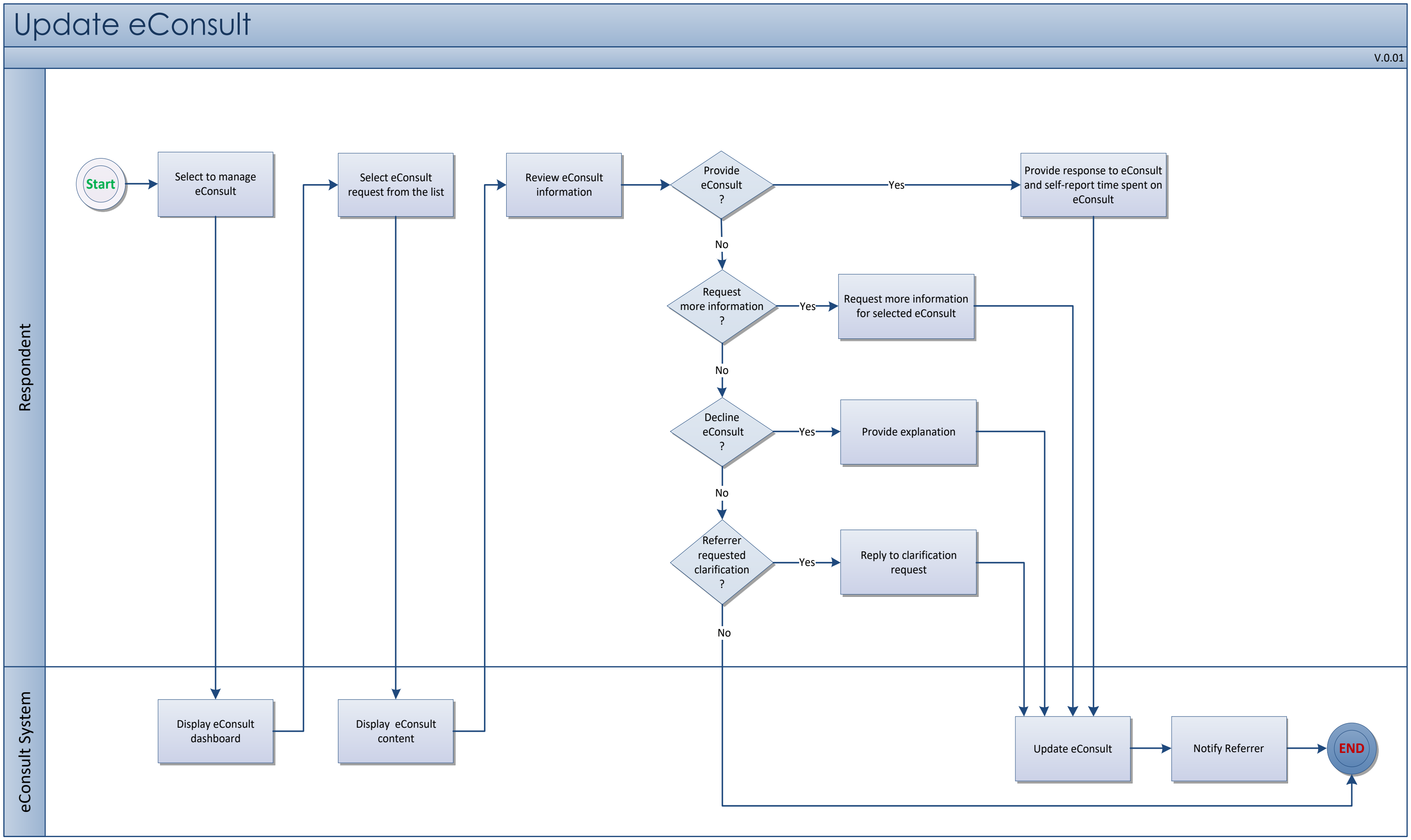

Figure 4- Updates eConsult Workflow for Respondent

2.7.4 Attach File to Existing eConsult

Important: All the 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 have functionality to attach files to an existing eConsult.	The EMR user MUST have the option to attach files to an existing eConsult (that has already been submitted to the provincial eConsult service). The EMR Offering MUST NOT limit the number of files that can be attached per eConsult. Refer to "File Operations" in the eConsult Implementation Guide, 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. **Note**: Once an eConsult is submitted, the attachments cannot be edited, modified, or deleted.	M	N

2.7.5 Add Note to eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.02	The EMR Offering MUST have functionality to add notes to an existing eConsult.	An EMR user may wish to add an eConsult note at any time before the eConsult is completed. An eConsult note MUST be sent to the eConsult service. For more information, refer to "Add Note" in the eConsult Implementation Guide. **Note**: The eConsult note is no longer editable once sent to the provincial eConsult service.	M	P

2.7.6 Request Clarification

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.03	The EMR Offering MUST have functionality 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 Implementation Guide.	M	P

2.7.7 Provide More Information

All the requirements in this table apply to referrers and their delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.04	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 Implementation Guide.	M	P

2.7.8 Complete eConsult

Important: All the requirements in the table below apply to referrers, referrer delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.05	The EMR Offering MUST have functionality to complete an eConsult after the respondent has provided a response.	An eConsult MUST be completed only by the referrer who originally created the eConsult. 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 Implementation Guide. Once a case is completed it cannot be re-opened.	M	P

2.7.9 Provide Feedback

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.06	The EMR Offering MUST provide an opportunity for user feedback upon completion an eConsult.	When an eConsult is completed, the referrer must be prompted to complete the following components of user feedback: a) free-text feedback to the respondent (optional for referrer to fill) b) mandatory survey question(s). The EMR Offering MUST provide the ability for the referrer (or the referrer delegate) to optionally provide free-text feedback upon completion of an eConsult. Additionally, a referrer (or their recipient delegate) MUST be prompted with a survey containing specific question(s). Each question typically entails a mandatory response section and an optional comments section. Questions MUST be retrieved from the provincial eConsult service. Refer to Complete Case" in the eConsult Implementation Guide.	M	U

2.7.10 Cancel eConsult

Important: All the requirements in the table below apply to referrers, referrer delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.07	The EMR Offering MUST have functionality to cancel an eConsult.	An eConsult can be cancelled only by the referrer who created the eConsult. Upon cancelling an eConsult, changes MUST be submitted to the provincial eConsult service. For more information, refer to the "Return Case" in the eConsult Implementation Guide.	M	P

2.7.11 Re-Assign eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.08	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	U

2.7.12 Request More Information

Important: All the requirements in this table apply to respondents and their delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.09	The EMR Offering MUST have functionality to request more information prior to responding to an eConsult.	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. 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 Implementation Guide.	M	P

2.7.13 Decline eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.10	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 Implementation Guide.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.11	The EMR Offering MUST prompt for a reason in order to decline an eConsult.	One of the following reasons for declining MUST be selected by the eConsult user: • Incorrect specialty • Not available • Other In addition, the EMR Offering MUST provide the option to include comments in free-form text. If the reason of “other” was selected, a comment by the EMR user MUST be provided.	M	P
ECS07.12	The EMR Offering MUST prompt for a reason and time spent when an eConsult is declined.	When an eConsult is declined, the EMR Offering MUST prompt the respondent for a return reason. Once completed, the respondent is also prompted to enter the time spent on the case with the option to select zero (0) minutes. The EMR Offering MUST support the following business rules for each reason for declining an eConsult: • Not available – The EMR user cannot submit minutes spent • Incorrect specialty – The EMR user MUST be prompted to submit time spent. Note that the EMR user may choose to enter zero (0) minutes. Other - The EMR user MUST be prompted to submit time spent. Note that the EMR user may choose to enter zero (0) minutes.	M	U

2.7.14 Provide Consult

Important: All the requirements in this table apply to respondents and their delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.13	The EMR Offering MUST have functionality to provide a consult in 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 Implementation Guide.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.14	Once a consult is provided, the EMR Offering MUST provide functionality to complete an eConsult.	For more information, refer to “Complete eConsult” in the eConsult Implementation Guide.	M	P

2.7.15 Self-Report Time

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.15	The EMR Offering MUST prompt for the amount of time it took to respond to an eConsult upon completing an eConsult.	The respondent MUST specify "time spent" on the eConsult upon providing an eConsult. The EMR Offering MUST prompt the EMR user with a predefined list of available options to choose from: • 0 minutes • 1-5 minutes • 6-10 minutes • 11-15 minutes • 16-20 minutes • 21-25 minutes • 26+ minutes The EMR user MUST have the option to provide additional comments in the free-form text. Exception: 26+ minutes If the EMR user selects option “26+ minutes”, they MUST provide an exact whole number of minutes (which MUST be greater than or equal to 26) spent. Additionally, they MUST provide a free-text comment. If this option is selected by the EMR user, the EMR Offering MUST send the exact number of minutes along with the comment to the provincial eConsult service. Upon the EMR user providing the reported time, the EMR will send the upper limit of the selected time range (e.g., the value of “10” is sent if “6-10 minutes” was selected).	M	U

2.7.16 Reply to Clarification Request

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.16	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 Implementation Guide.	M	P

2.7.17 eConsult Flag

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.17	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 Implementation Guide for information relating to the eConsult Flag.	M	U
ECS07.18	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: • EDUCATION • RESEARCH • OTHER 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.	M	U
ECS07.19	The EMR Offering MUST include the eConsult Flag value when printing an eConsult.	The EMR Offering MUST include the eConsult Flag value associated with an eConsult any time the eConsult is printed.	M	U
ECS07.20	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.	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		For additional eConsult search requirements, refer to “Search for eConsults” section.		

2.8 Error Handling

Important: All the 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 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 Implementation Guide for error, warning or informational messages generated by the provincial eConsult service.	M	P
ECS08.02	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

2.9 Reporting

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.01	The eConsult Activity Report request MUST be filtered by a valid “eConsult Submitted on” date range.	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). Mandatory rules when retrieving an eConsult Activity Report: a) Both “From” and “To” dates MUST be populated	M	N

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		b) Both "From" and "To" date MUST NOT accept a future date c) The "From" date MUST chronologically precede the "To" date Date fields MUST follow the ISO format. For more information, refer to the eConsult Implementation Guide. 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): a) A date AND time which is provided by the user, or b) 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. 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).		
ECS09.02	The eConsult Activity Report request MUST be filtered by the eConsult "User Role".	The EMR Offering MUST retrieve the eConsult Activity Report providing a user-specified valid "User Role". Valid values are: • Requester • Specialist 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. 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.	M	N

2.10 Delegator Selection

Important: All the requirements in this table apply only to referrer delegates and respondent delegates.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS10.01	The EMR Offering MUST provide a delegator selector that allows delegate eConsult users to select the delegator for whom they are creating an eConsult.	Delegates are allowed to respond to cases on behalf of their delegators. Since delegates can have more than one delegator, it is necessary to choose which delegator the user will be acting on behalf of before retrieving and responding to cases. The EMR Offering MUST have functionality for a delegate to retrieve their list of delegators from which to select. The list of delegators MUST display the first name and last name of each delegator returned. The delegator selector applies to all requirements defined in the "Create eConsult" and "Update eConsult" sections. Refer to "Search Delegators" in the eConsult Implementation Guide.	M	N
ECS10.02	The EMR Offering MUST include the selected delegator in the Requester element on the Task resource when the eConsult is submitted.	The EMR Offering MUST populate the Requester element with the email address and username of the selected delegator.	M	N

3. APPENDIX A: ECONSULT FILE UPLOAD/DOWNLOAD SERVICE

The following information is related to attaching a file to an eConsult and retrieving an attached file from an eConsult. This is an overview of the workflow when a file is attached to an eConsult. Note that this workflow is not proxied through the HIAL. It returns a temporary URL which will be valid for a short period of time (e.g., five minutes) in the payload. The temporary URL will be used to transfer the file directly to/from the provincial eConsult service's file web service. This service will return a Shared Secret and a File ID which will be stored together with the eConsult case. Refer to "File Operations" for further details, or "Supported File Types" for the list of accepted attachment file types as in the eConsult Implementation Guide.

Notes: 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 future.

The figure below depicts the workflow of File Service.

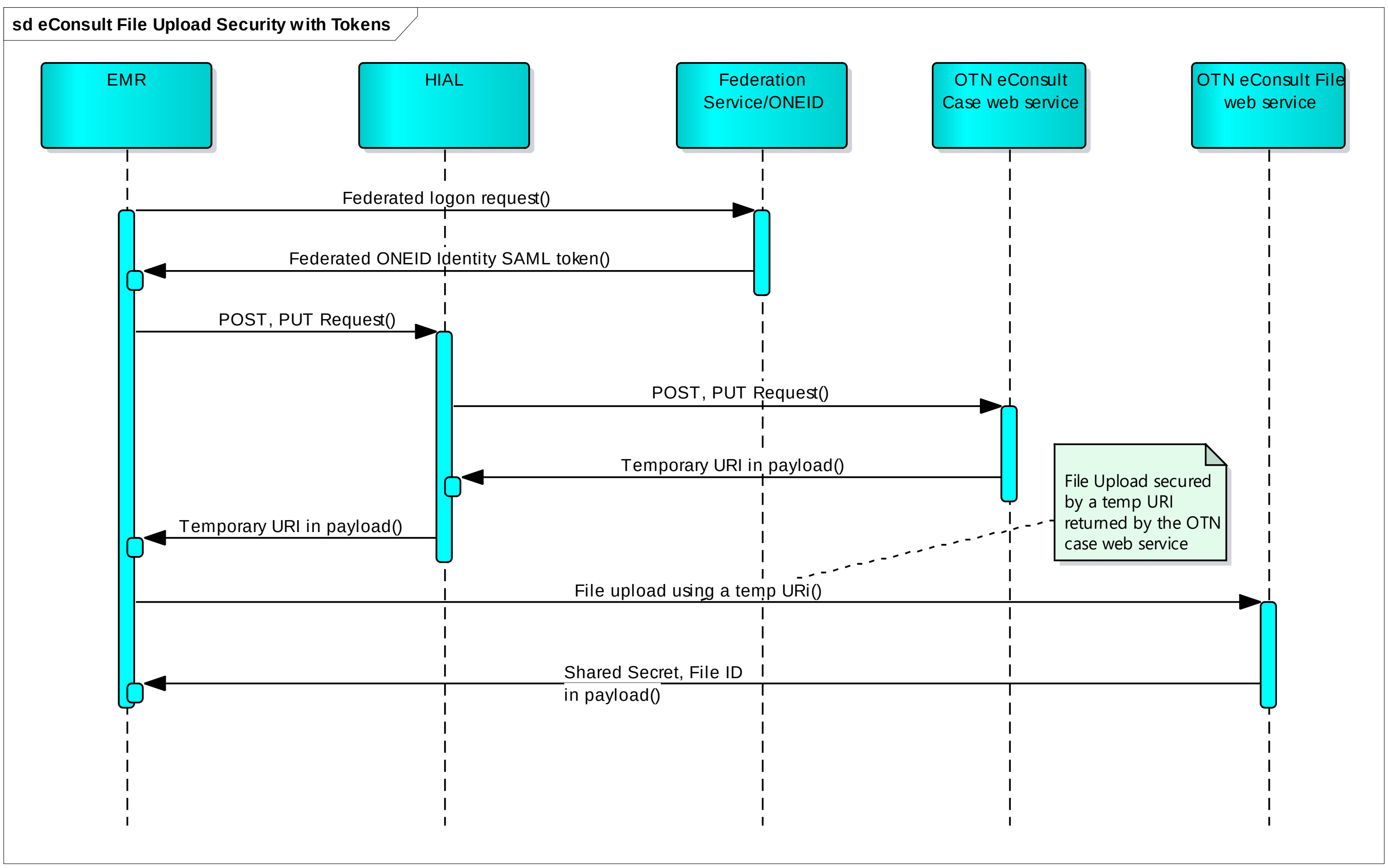

Figure 5 - Workflow of File Service