Best Practice Guidelines for requesting primary care providers Participating in the Ontario eConsult Service

These guidelines are being provided to you in connection with your use of the Ontario eConsult Service (the "eConsult Service"). These guidelines are supplementary to the OTNhub Terms of Service and User Agreement (the "OTNhub Agreements").

A. Background

The eConsult Service provides primary care providers (physicians and nurse practitioners) with an asynchronous electronic communication tool that allows them to communicate directly with specialists via a web-based portal so they can obtain advice about their patient's care. The eConsult Service has been developed to improve equitable and timely access to specialist advice for requesting primary care providers and their patients. The requesting primary care provider is responsible for deciding whether to follow the advice received. If clarification is needed, the service provides the opportunity to have a back and forth conversation.
All participants must be committed to collegial, effective communication between primary care and specialists and providing excellent patient care.

B. Registering for the Service

All participating primary care providers must complete the onboarding process. This includes registration, training, and who to contact in case of concerns/suggestions.

Only members in good standing of the College of Physicians and Surgeons of Ontario or College of Nurses of Ontario with an extended class license can participate. Appropriate medical (or other health professional, as applicable) protective insurance must be maintained. Providers must withdraw from the service if they are no longer members of their professional college in good standing or covered with medical protective insurance.

C. Service Level Expectations of providers requesting eConsults

eConsult requests are for non-urgent patient questions and are not intended for urgent cases nor as a mechanism to jump ahead of a usual face- to face referral process. If a referral is recommended, the primary care provider should use their usual referral pathways.

The eConsult should contain relevant, patient specific information in sufficient detail for the specialist respondent to provide advice.

D. Initiating a request

The requesting primary care providers must provide necessary information about the patient's problem; the clinical question to be answered; patient details; and relevant investigations, treatments, and medication. **Any images or attachments should be legible and clearly identify source and location in the case of photos ([Dermatology eConsult Image Requirements](#) – click to download document).**

As such, specialists should have sufficient details about the patient's condition to be able to provide answers to specific questions and give appropriate advice. However not all patient questions can be answered through eConsult. The specialist may request the requesting primary care provider provide more information prior to providing an opinion or may decline to make a recommendation. If further information is required, or an opinion cannot be provided, the specialist will communicate same to the requesting primary care provider.

E. Timeliness of Response

It is expected that the specialist will reply within <u>seven days</u> from the date of receipt of the eConsult from the requesting primary care provider. If a request is made for more information, it is expected that the PCP will respond in a timely manner.

F. Privacy

The eConsult Service stores the clinical information/personal health information related to an eConsult submitted by a provider securely in a repository ("PHI"). Through a series of workflows, information is transferred from this database into forms which only the identified parties involved in the eConsult interaction can access.

Access to the eConsult platform requires individualized user accounts and is password protected. Requesting primary care providers (or delegates acting on their behalf) will only have access to information about consultations the requesting primary care provider has initiated, while responding specialists will only have access to consultations assigned to them.

Primary care providers that use delegates on their behalf should notify the eConsult Service immediately once a delegate has changed roles or left the practice and should no longer have access on behalf of the assigning primary care provider.

All privacy and security policies that apply to patient charts in the requesting primary care provider's office should apply to the consultation reply.

If photos/additional documents are created for the purpose of eConsult, the requesting primary care provider should ensure that these materials are deleted/managed in accordance to patient privacy legislation and/or institutional policy.

With respect to electronic technology and relevant security standards, physicians are encouraged to refer to the following College of Physicians and Surgeons of Ontario (CPSO) policy statements:
- "Confidentiality of Personal Health Information" which addresses technology and the maintenance and communication of personal health information:
  http://www.cpso.on.ca/policies/policies/default.aspx?ID=1500
- "Telemedicine" which addresses security and how to ensure the privacy and confidentiality of a patient's personal health information:
  http://www.cpso.on.ca/Policies-Publications/Policy/Telemedicine

G. Documentation

The primary care providers initiating an eConsult maintain their role as health information custodians of PHI that they create or collect through an eConsult, and should follow all existing rules, regulations and laws. As mentioned above, the referring HCP should provide sufficient information about the patient so that a specialist may provide needed healthcare advice and recommendations for treatment.

The consultation response will be included in the record of the eConsult which can be accessed by the requesting primary care provider and the specialist following the closure of the case. The record should be

downloaded by the requesting primary care provider or their delegate and stored in paper or electronic formats in the primary care provider's record for the patient.

Locum physicians using eConsult will be responsible for ensuring that any eConsults obtained while locuming in a practice are received by the practice if the eConsult is completed after the locum term is complete. Wherever possible locums should use the local practice delegate to submit an eConsult (see below)

H. Engagement

Primary care providers participating in the eConsult Service should be active participants in continuous improvement of the Service. This may include answering a close-out survey, reviewing proposed changes to the Service, physician utilization of the Service evaluation data provided to them and providing input on workflow/system improvements. This may involve working with regional and provincial stakeholders.

I. Role of Delegates

In some circumstances, a primary care provider will delegate the responsibilities for entering/retrieving eConsult data to an appropriate staff member (i.e. referral clerk) within their practice or use eConsult to support their residents or trainees who submit an eConsult under their supervision. The primary care provider is responsible for ensuring that the delegate has the necessary training and credentials for this role and is responsible for advising the eConsult Service when a trainee or staff member no longer has a role as their delegate for the purposes of the eConsult Service.

J. Billing and Payment information

Requesting primary care providers may bill OHIP K738 as per the rules in the Schedule of Benefits**.** The medical record requirements for billing K738 include:
- The medical record includes the patient's name, health number, names of referring and consultant physician, reason for the consultation and opinion and recommendations of the consultant physician.
- PCP code

K. Contacts

Questions about eConsult can be directed to the eConsult Centre of Excellence at eConsultCOE@toh.ca. Technical questions about eConsult can be directed to OTN's Customer Care team at 1-855-654-0888 or by email at customercare@otn.ca**.**