A consult request is a request related to a patient, when the requesting provider could benefit from consulting with a specialist to enhance the care pathway.

The requesting provider selects whether to submit their request to a specific specialist (or specialty group/program) or to a specific therapeutic area of care (*i.e.*, a BASE managed specialty*). The request includes patient information, a detailed description of the request, and any available attachments.

When requesting a consult, you can:

- Save it as a draft (to create a draft copy and return to it later) or
- Delete the draft (discard and nothing is saved) or
- Send the request to the selected specialist/group/program or BASE managed specialty.

You can begin creating a case in different ways.

A. From the OTNhub eConsult service.

i. Sign in at otnhub.ca and go to the eConsult service.

ii. Click Request Consult in the top of the left navigation panel.

B. From the OTNhub Directory.

i. Sign in at otnhub.ca and go to the Directory.

ii. Search for a specialist and in the search results click the eConsult action button ( ) associated with that specialist.

C. From the OTNhub home page.

i. Sign in at otnhub.ca.

ii. In the **Ask a Clinical Question** panel, click Launch eConsult.

iii. Click Request Consult in the top of the left navigation panel

Table of Contents

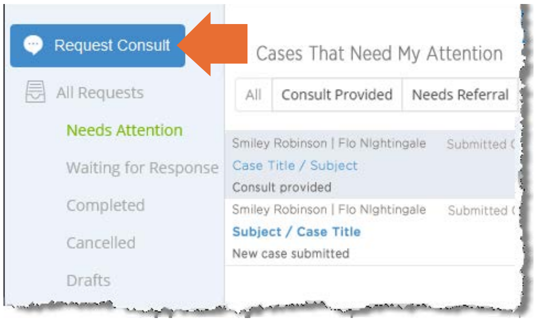

Figure 1: eConsult "Request Consult" button

Figure 2: Directory eConsult action button

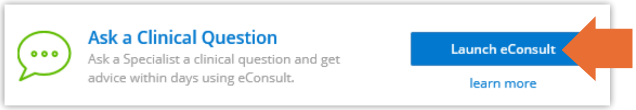

Figure 3: OTNhub homepage eConsult panel

* A group of specialists responding to eConsult cases for a given specialty or sub-specialty (e.g., Pediatric Cardiology) **within a specific region**. Your case is routed to the closest regional or provincial managed specialty group. Cases are assigned based on the specialist's availability.

Providing Request Details

The request details include demographic information about the requesting provider, the target specialist or group, and the patient.

1. The **Requester** field is automatically populated with your name. (That is, the name of the person currently logged into the eConsult application.)
   - If you are a **delegate** acting on behalf of a requester, the field appears as a drop-down list. Select the requester you are acting for.
   - To view more information about the requesting provider, click the **Requester** name. (If the requestor has an OTN Directory profile, their profile page opens. If they don't have a Directory profile, their address and billing information appear under their name.)
2. Identify the eConsult model used for your request.
   - To submit your request directly to a specific consultant or group, select **Specific Provider or Group** and skip to step #4.
   - To submit to a therapeutic area of care within a regional or provincial managed group, select **BASE Managed Specialty**.
   - You can change the selected model up until you click the Submit button.
3. If you selected a BASE managed specialty:

   a) Select a **Specialty** category and option. The second 'option' drop-down list appears only if the category has options associated with it.

   b) eConsult automatically selects the **Region** nearest to the requestor's address (that is, the address as published in the OTNhub Directory).
   - To change the automatically selected region, click the **Change** link beside the Region name and select from the drop-down list.
   - The drop-down list displays all available BASE managed groups for your selected specialty and sorted by ascending proximity to the requestor's address.

   c) Skip to step #5 on page 4.

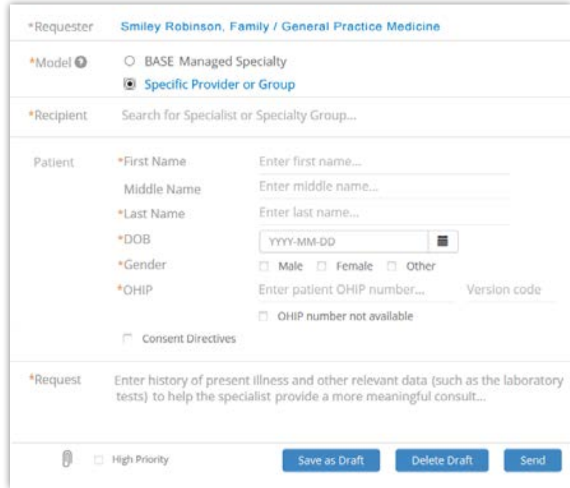

Figure 4: Create request form - specific provider

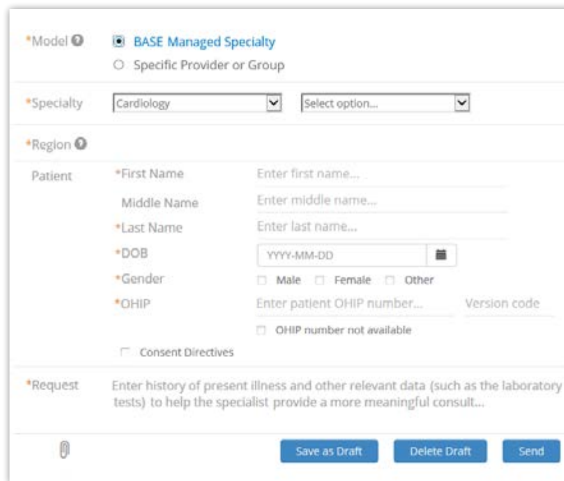

Figure 5: Create request form - BASE managed specialty

Continued on next page...

4. If you selected a specific provider or group:

If you opened the new case from the OTNhub Directory, the **Recipient** field is pre-populated.

If you opened the new case from within eConsult, you need to search for and select a specialist/group.

i. To begin searching for a specialist/group, type at least two characters in the **Recipient** field.

- As you type, the system displays a list of possible matching specialists (their name, specialty, city, LHIN) and groups (name and organization).
- The search results include only specialists/groups that are registered for eConsult and accept eConsult cases.
- To view more details about a specialist/group, move your mouse over the name in the list. (Note: More information appears only if the specialist has added conditions or a description to their Directory profile.)
- If a specialist's name appears in red text, they have set an **out-of-office notice**. You can still select them for the case, but note that they will not be available for response until they return to office.

ii. To select a specialist/group, click the name in the drop-down list.

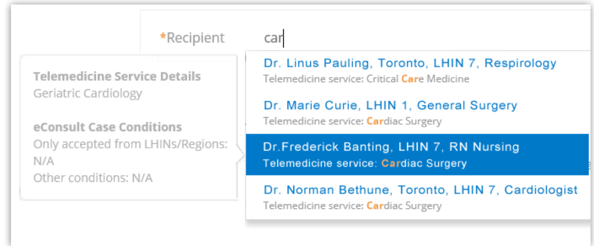

Figure 6: Specialist more information

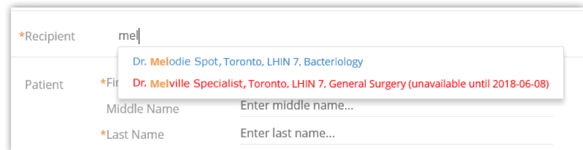

Figure 7: Specialist out-of-office notice

Search tips

The search looks for matches *beginning with the first letters* of a field.
For example: If you type **smi**, the search will find names such as **Smi**ley Robinson or Ginger **Smi**th. (It will not find We**smi**ll Aardvark or Joe Black**smi**th.)

The more characters you type, the narrower the search and the smaller the search results list.

eConsult uses the standard OTNhub Directory search (with a filter for eConsult).
For more information about this, see Searching via the Directory.

After selecting a specialist/group, you can view more information using the links below their name.

- If there are case or patient eligibility conditions, a linked orange **Note** appears. Click to view the details.
- To view their Directory profile details in a new tab/window, click the **View Directory Profile>>** link.

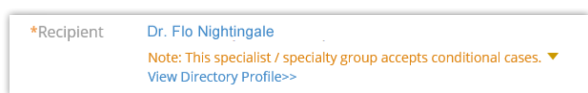

Figure 8: Specialist links for more information

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5. Type the patient's demographic information in the associated fields (first, middle, and last names, date of birth, gender, OHIP number).

- All fields are required except the **Middle Name** and **Version code**.
- If the patient does not have an OHIP number, select the **OHIP Number Not Available** checkbox.
- By default, the level of Patient Consent is set to allow full sharing of the patient's PHI.

  If the patient wants to limit the sharing of their PHI, select the checkbox ☑ **Consent Directives*** and type the patient's request in the associated text field.

6. In the **Request** field, type the clinical question and other relevant information about the case for the specialist. (Note: there is a maximum limit of 4,000 characters in the Request field. If you have longer notes, use the attachment feature.)

7. If you have images or other files you want to include in the consult request, to attach files click the 📎 link at the bottom of the panel.

eConsult automatically saves a draft of the consult request as you add information. However, while providing the details, at any time you can save a draft or delete the draft.

When you have completed the request details, you can submit and send the case to the target specialist/group.

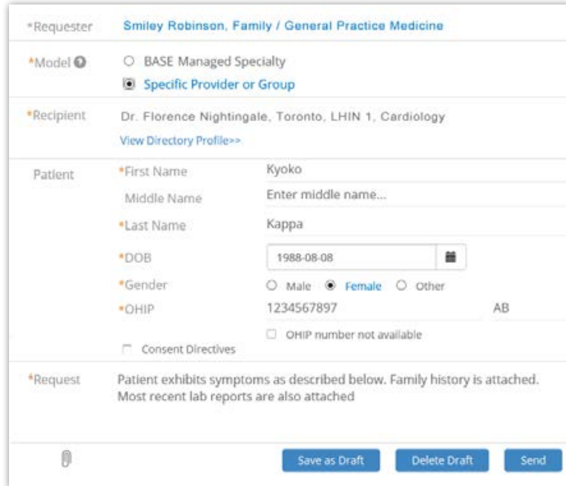

Figure 9: Request details - specific provider

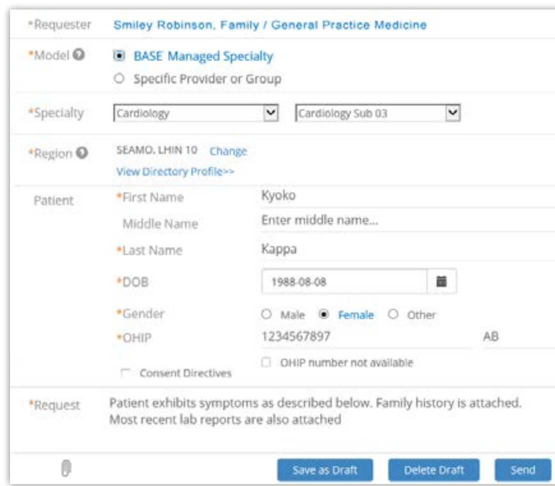

Figure 10: Request details - BASE managed specialty

* This is a mandated PHIPA/privacy feature that is part of informed consent from the patient.

Attaching Files

You can attach multiple files to your consult request. For each attachment you should include a brief but meaningful description. Ensure that the recipient has the right software for viewing the attached files.

Notes: (1) The attachment must be a valid file type. eConsult does not accept 'unsafe' file types such as .exe, .vbs, .tmp, etc. For a standard list of unsafe types, refer to the Microsoft Office Outlook support web site.
(2) Maximum file size is 500 MB.
(3) There is no space/storage limit per user or per consult request.

1. If you have image files or other report files to include with the consult request notes, do either of the following:
   - Click the paperclip link ( ) at the bottom of the Request Details panel, navigate to the file location and select the desired file.

     Or
   - Using Windows Explorer (or Mac Finder), navigate to the file location, select the file and drag and drop the desired file into the dashed-line square.

   For each file attached, eConsult checks that it is a valid file type, is within size limits and performs a virus scan. (A progress bar appears as these steps are completed.)
2. For each attached file, click in the text field just below the file name and enter a short but meaningful description.
3. To remove a listed file, click the **X** at the far right of the designated file. (For example, if after selecting a file, you realize you made a mistake and want to select a different file.)

   The list of attached files refreshes and reappears without the selected file and a success message briefly appears.

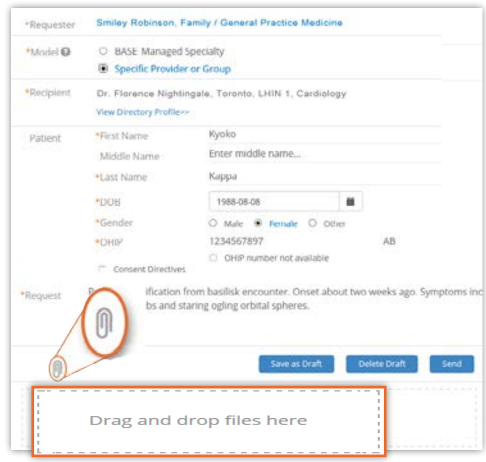

Figure 11: Two methods to attach files

Figure 12: List of attached files

eConsult automatically saves a draft of the consult request as you add file attachments. However, while providing the request details, at any time you can manually save a draft or delete the draft.

When you have completed the request details, you can submit and send the consult request to the specialist.

Valid File Types

File Extension	Description
3GPP, 3GPP2	Third Generation Partnership Project Multimedia
AVI	Video
BMP	Image
DCM	DICOM
DOC, DOCX	MS Word Document
EXIF	Exchangable Image
FLV	Video
GIF	Image
JPG, JPEG, JFIF	Image
M4A	Audio
MKV	Video
MOV	Video
MP3	Audio
MP4	Video
MPG/MPEG	Video
OGG	Audio
PDF	PDF
PNG	Image
PPT, PPTX, PPS, PPSX	PowerPoint
QT	Video
RAW	Image
RTF	Rich Text
SIA	medX Health file type for magnified view of files
TIFF	Image
TXT	Text Document
WAV	Audio
WKS, WK1, WK2, WK3, WK4	Lotus 1-2-3
WMA	Audio
WMV	Video
WPD, WP, WP4, WP5, WP6, WP7	Word Perfect
XLS, XLSX, CSV	Excel Document
XPS	Open XML Paper

Saving or Deleting a Draft

The action buttons for requesting a consult appear at the bottom of the Request Details panel.

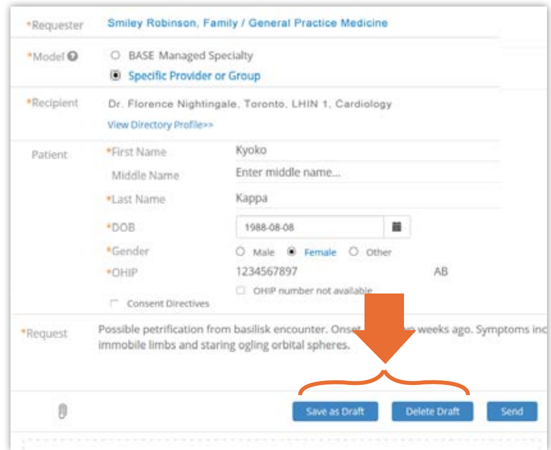

Figure 13: Draft buttons for consult request

Saving a Draft

Saving a draft allows you to navigate elsewhere within eConsult and then complete the consult request later.

eConsult automatically saves a draft of the request as soon as the details include any of the following:

- A selected specialty.
- Any patient field has at least two characters.
- The Request field has at least two characters.
- At least one file is attached.

To manually save a draft of the consult request, click Save as Draft.

eConsult does the following when a draft is saved (automatically or manually):

- Saves the request details, sets the status to 'Draft' and the request is only available to you (or your delegates).
- Briefly displays a success message.
- The 'Save as Draft' button changes to Draft Saved until you change or add content.

Deleting a Draft

If you change your mind while creating a new request and want to discard the partially completed request or if you have a draft request that was created earlier, you can delete the draft.

1. To start the deletion, click Delete Draft.

   A confirmation dialog box appears.

2. To confirm and discard, click OK.

   When you discard, eConsult does the following:

   - Closes the Request Details without saving.
   - Returns you to the eConsult dashboard.
   - Briefly displays a success message.

Sending the Consult Request

After you have completed all the required fields and added all relevant notes and files, you can send the request.

To submit and send the consult request to the selected specialist/group, click Send.

eConsult validates the data you entered. If there is an error, an error message appears, the request is not sent and it remains a draft.

If there are no errors, eConsult does the following:

- Saves the request, assigns a Case ID, and the request is available to all parties involved.
- Closes the request form and briefly displays a success message.
- Returns you to the eConsult dashboard and the request appears in your Requests List (and in the specialist/group's Case List).
- Sends an email notification* to the specialist/group.

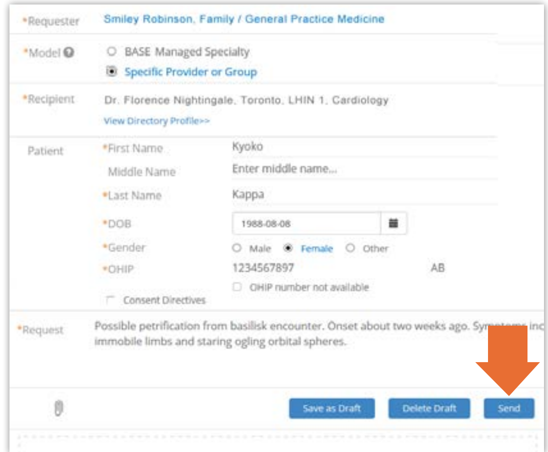

Figure 14: Send consult request button

* The email recipient might have turned off their eConsult email notifications.