

Best Practice Guidelines for Midwives 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 requesting clinicians (physicians, nurse practitioners, and midwives) 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 clinicians and their patients. The requesting clinician 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 requesting clinicians and specialists and providing excellent patient care.

B. Registering for the Service

All participating requesting clinicians must complete the onboarding process. This includes registration, training, and who to contact in case of concerns/suggestions. Only members in good standing with the College of Physicians and Surgeons, Ontario or College of Nurses of Ontario with an extended class license, College of Midwives of Ontario (CMO) or Indigenous Midwives practicing under the Exemption Clause of the Midwifery Act (1991), or their governing bodies can participate. Appropriate medical (or other health professional, as applicable) protective insurance must be maintained. Clinicians 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 clinicians 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 the usual face-to-face referral process. eConsult should not be used when the client's condition clearly requires an in-person assessment by a specialist or a transfer of care. If a referral is recommended, the requesting clinician 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 clinician 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 clinicians 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 clinician.

E. Timeliness of Response

It is expected that the specialist will reply within seven days from the date of receipt of the eConsult from the requesting clinician. 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 clinician 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 clinicians (or delegates acting on their behalf) will only have access to information about consultations initiated by the requesting clinician, while responding specialists will only have access to consultations assigned to them. Requesting clinicians 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 clinician. All privacy and security policies that apply to patient charts in the requesting clinician’s office should apply to the consultation reply. If photos/additional documents are created for the purpose of eConsult, the requesting clinician should ensure that these materials are deleted/managed in accordance with patient privacy legislation and/or institutional policy. With respect to electronic technology and relevant security standards, clinicians are encouraged to refer to the policy statements:

- College of Midwives of Ontario (CMO) Standards and Guide to Compliance with Personal Health Information Act: <https://cmo.on.ca/wp-content/uploads/2017/09/CMO-PHIPA-Guide-November-2021.pdf>
- Association of Ontario Midwives (AOM) resources on Electronic Privacy: <https://www.ontariomidwives.ca/electronic-privacy>
- AOM Template Privacy Policy Suite <https://www.ontariomidwives.ca/protocols> (log in required)

G. Documentation

The clinicians 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 requesting clinician 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 clinician and the specialist following the closure of the case. The record should be downloaded by the requesting clinician or their delegate and stored in paper or electronic formats in the clinician’s record for the patient. Locum clinicians 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

Clinicians participating in the eConsult Service should be active participants in continuous improvement of the Service. This may include providing close-out feedback, reviewing proposed changes to the Service, clinician 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 clinician 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 trainees who submit an eConsult under their supervision. The clinician 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.

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 customer care@otn.ca.

L. Special Challenges and AOM Guidance for Midwives Using eConsult

Midwives have a more defined client population and restricted scope of practice than the physicians and nurse practitioners who were the users of the program when it was initially designed. Midwives are being added to the program as of February 2024. There will be challenges for the midwives and eConsult specialists which will only be identified and clarified as midwives use eConsult. Some expected issues are addressed below. Midwives who have additional questions or concerns about risk management or liability are encouraged to contact AOM ON CALL by calling the Association of Ontario Midwives at 1-866-418-3773.

M. Using eConsult within the Midwifery Scope of Practice

eConsult provides specialist advice for the management of care, but it does not transfer responsibility for providing that care to the consultant. The midwife initiating the consultation remains the most responsible person (MRP). The midwife must continue to practice within the midwifery scope of practice as defined in legislation and CMO standards and policies. This includes prescribing or administering medications only as permitted under the Designated Drug Regulation of the Midwifery Act and ordering only the tests permitted under the Regulations of the Laboratory and Specimen Collection Centre Licensing Act. An eConsult does not delegate authority to the midwife to provide care recommended by the specialist outside the midwifery scope of practice. When using eConsult, each clinician is expected to meet the standard of care appropriate to their role in client care and their professional scope of practice.

N. Information Midwives Should Provide to a Specialist through eConsult

The midwife is responsible for providing information about the client's medical history and current condition and posing specific questions for the specialist to answer. The request through eConsult should be a well-organized and succinct presentation of the information which a midwife could reasonably anticipate being necessary for the specialist to make an assessment and provide advice for a specific client. (See Section D above.) Context, such as whether the client lives a few minutes from the level 3 hospital where the midwife has privileges or in a community with limited health care resources, may be relevant to answer some questions in some cases. Not all the specialists accessed through eConsult will have worked with midwives and they may not be familiar with the model of care, the scope of practice, or the communities and settings where care is provided.

O. Documentation, Communication and Coordination of Care

The midwife must ensure that the request for eConsult and the specialist's responses are contained in the client record, are discussed with the client, and are available to other clinicians within the circle of care as appropriate. An eConsult allows back and forth dialogue for the specialist to gather more information from the requesting provider and for the requesting provider to seek clarification from the specialist. The midwife can request clarification or further information from the eConsult specialist after the initial advice is given, when new questions arise, or if the client's condition changes. As MRP, the midwife is responsible for developing a plan of care with the client based on the midwife's knowledge, skill and judgement, the advice of the eConsult specialist, and the client's informed choice. Midwives should document informed choice discussions about the eConsult specialist's advice and the client's choices.

P. Liability

Midwives are responsible for the care they provide directly to clients and for arranging for other clinicians to provide care which is outside midwifery scope of practice, using the health care resources available in their communities. If additional clinicians become involved in the care, those clinicians are responsible for the care they provide. All clinicians involved in the care act on their own authority and must use their knowledge, skill, and judgement within their own scope of practice whether or not they follow the advice of the eConsult specialist.

Q. Responsibilities of the eConsult Specialist

Unlike a specialist providing an in-person consultation, the eConsult specialist is not responsible for communicating with or providing care directly to the client. eConsult specialists must use their knowledge, skill, and judgement to answer questions and give advice based on the client-specific information provided by the requesting clinician. The eConsult specialist is part of the client's circle of care and is responsible for providing appropriate and complete clinical guidance. The specialist can ask the requesting clinician for further information before providing advice or respond that the advice required does not fall within their specialty and recommend that a different specialty be consulted. Specialists may decline to provide advice through eConsult if they feel that the available information is inadequate, or a physical examination is needed to provide the appropriate advice. A physician who proceeds with an eConsult that does not meet the standard of care may be subject to disciplinary proceedings by the physician's college and may be liable in a civil action for any injury the patient suffers because of that failure to meet the standard.

R. When an eConsult Recommends Care Outside the Midwifery Scope of Practice

There will be cases where an eConsult specialist requests test results not available to the midwife before offering advice or will recommend management with procedures, tests, or medications not in midwifery scope. This does not mean that the eConsult is not useful. It may clarify who needs to be part of the care team. It may also make it possible for a nurse practitioner or physician who is not a specialist for the condition to be part of the client's care team and use the specialist advice to provide the elements of care not within the midwifery scope of practice. The midwife, not the specialist, is responsible for coordinating the care needed by the client, using the health care resources available in their community.

S. When is it Appropriate for a Midwife to Use eConsult?

eConsult may be most useful when:

- The midwife is unsure if the client's history or condition poses risks in the pregnancy, birth, postpartum, or for a newborn.
- The midwife can manage the condition within the midwifery scope of practice but has questions requiring the expertise of a specialist.
- The midwife needs to better understand the condition to seek appropriate care for the client in the community.
- There is limited or no access to the specialty in the local community, and local clinicians will need guidance to manage the care.
- There are questions about how a condition which is not currently a problem may evolve, and what assessments, signs and symptoms should prompt a higher level of concern.
- An eConsult could prevent an unnecessary in-person visit which may be difficult for the client to access.
- A client is hesitant to attend an in-person consultation but willing to seek the opinion of a specialist via eConsult.
- Information is needed to inform client discussions about choice of birthplace.

If the midwife fully understands the client's condition and knows that an in-person consultation or a transfer of care is indicated, using an eConsult as an intermediary step may unnecessarily delay access to the most appropriate care. An eConsult must be client specific and cannot be used to ask general questions about a condition the clinician sometimes encounters in practice. Midwives require informed consent from the client prior to initiating an eConsult. With a seven-day response time, eConsult should not be used for urgent concerns.