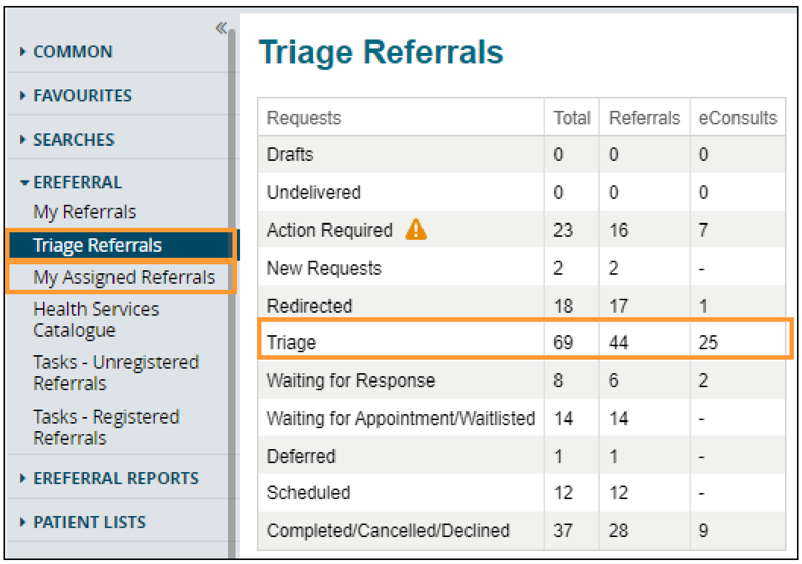
Manage and Triage eConsults

An eConsult (previously called an Advice Request) can be used when clinicians seek specialty advice for a non-urgent question or when unsure if a referral would be appropriate. An eConsult is often all you may need to manage your patient in their medical home.

View New eConsults

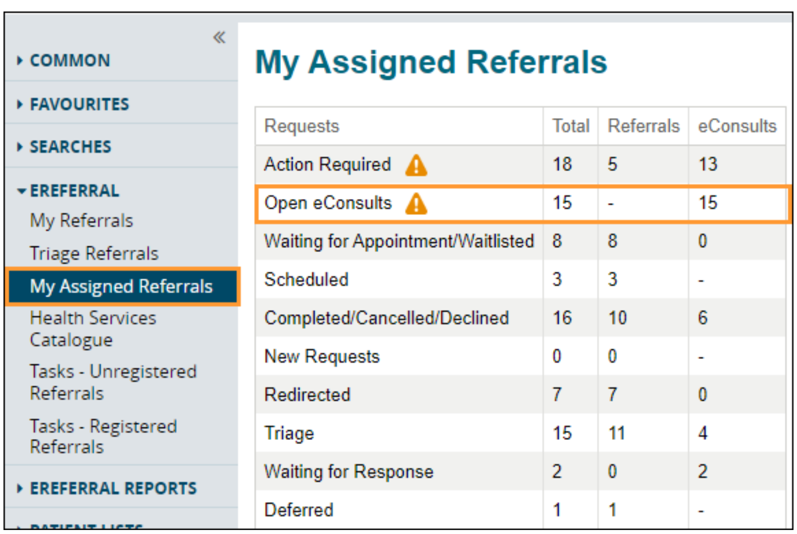
There are two ways to find a new eConsult:

a. If you are set up as a triage user, you can use the ***Triage*** worklist on the ***Triage Referrals*** dashboard. This will show every request that has arrived for your facility.



Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required	23	16	7
New Requests	2	2	-
Redirected	18	17	1
Triage	69	44	25
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	37	28	9

b. If you do not triage eConsults and only respond to them, you may or may not have access to the ***Triage Referrals*** dashboard. In this case, you can view requests on your ***My Assigned Referrals*** dashboard on the ***Triage*** or ***Open eConsults*** worklist after they have been assigned to you as a provider by a triage user.



Requests	Total	Referrals	eConsults
Action Required	18	5	13
Open eConsults	15	-	15
Waiting for Appointment/Waitlisted	8	8	0
Scheduled	3	3	-
Completed/Cancelled/Declined	16	10	6
New Requests	0	0	-
Redirected	7	7	0
Triage	15	11	4
Waiting for Response	2	0	2
Deferred	1	1	-

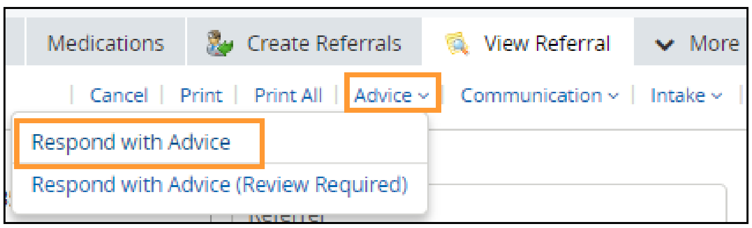
In the eConsult, there are several workflow options and two print options.

- ***Workflow Bar***: Used to change the referral status and to provide a response to a referring provider. Some eConsult workflow actions contain dropdown options indicated by the down arrow.
- ***Print and Print All***: Used to print or save as a PDF document.
- ***Cancel***: Used to cancel an eConsult.

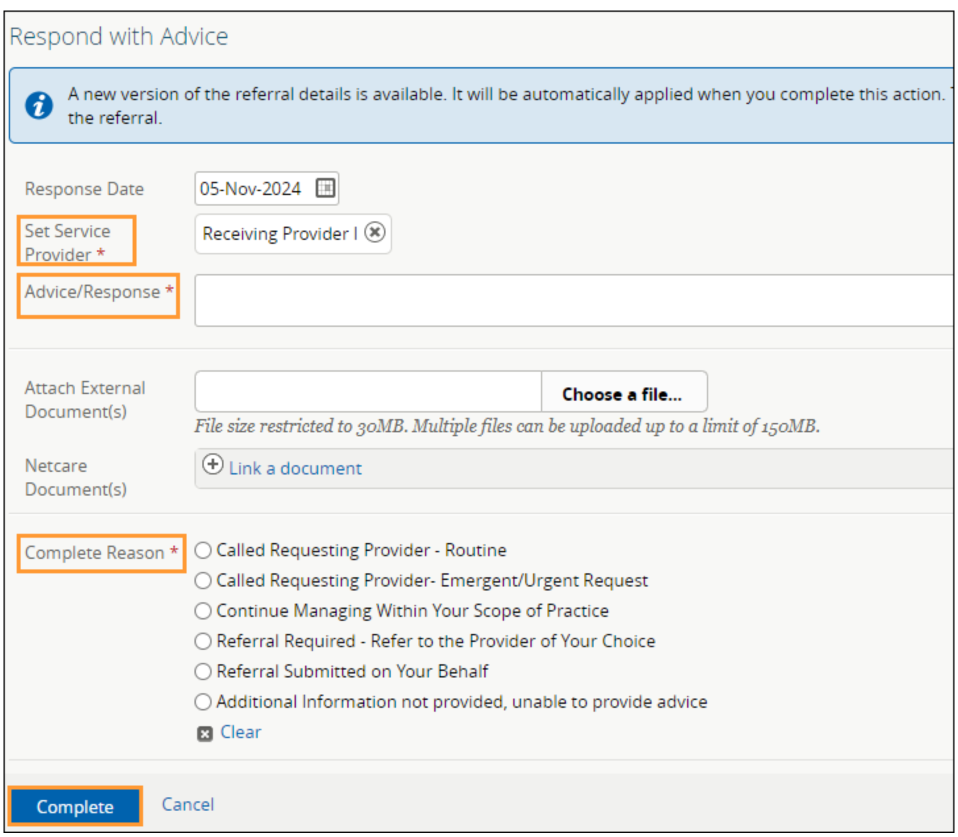
Respond with Advice

Use this option if you are a specialist responding to an eConsult.

1 If the eConsult is appropriate and you choose to respond, click ***Advice***, then ***Respond with Advice*** from the ***Workflow Bar***.



2 Set yourself as the ***Service Provider***. Your name will populate automatically as per your ***My Details*** configuration. Enter your response and add any attachments. Choose a ***Complete Reason*** from the list provided and click ***Complete*** to finish.

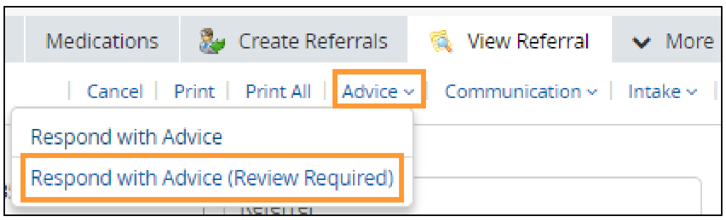


The eConsult will now appear on your ***Completed/Cancelled/Declined*** worklist on the ***My Assigned Referrals*** dashboard. If the referring provider has configured their eReferral Provider Notifications, they will receive an email notifying them that you have responded, and your response will appear in the eConsult on their ***My Referrals*** dashboard.

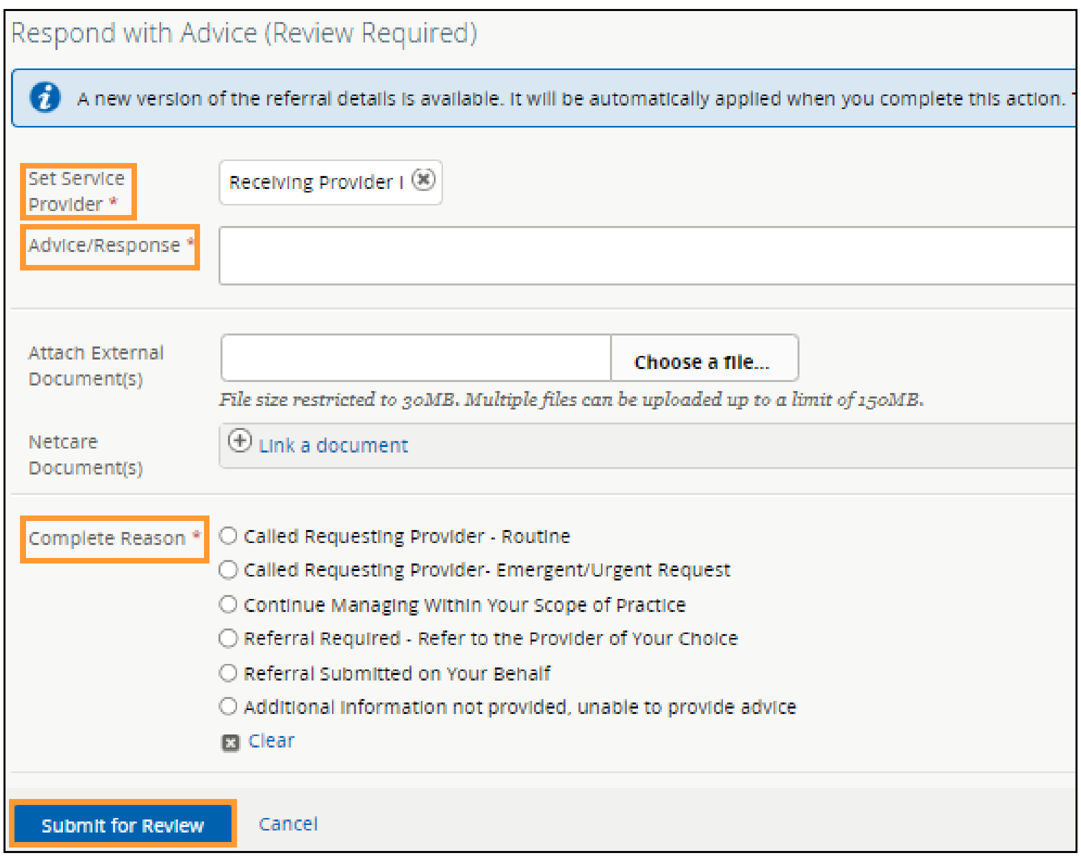
Respond with Advice (Review Required)

Use this option if you are a resident or other healthcare provider that requires a specialist to review your response before sending it back to the referring provider.

1. Select ***Advice***, then ***Respond with Advice (Review Required)*** from the ***Workflow Bar*** if there is a need for a specialist to review the advice before it is provided to the referrer (i.e. if a fellow or other staff member composes the response).

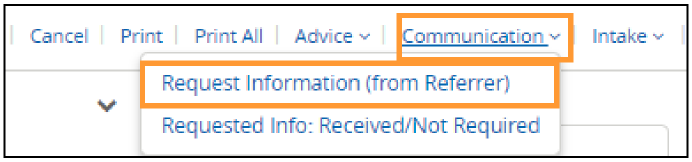


2. Set the specialist as the ***Service Provider***. Enter your response and add any attachments. Choose a ***Complete Reason*** from the list provided and click on ***Submit for Review*** to finish. The referral is now awaiting specialist review and will appear on the ***Action Required*** worklist on the ***Triage Referrals*** dashboard and ***My Assigned Referrals*** dashboard.

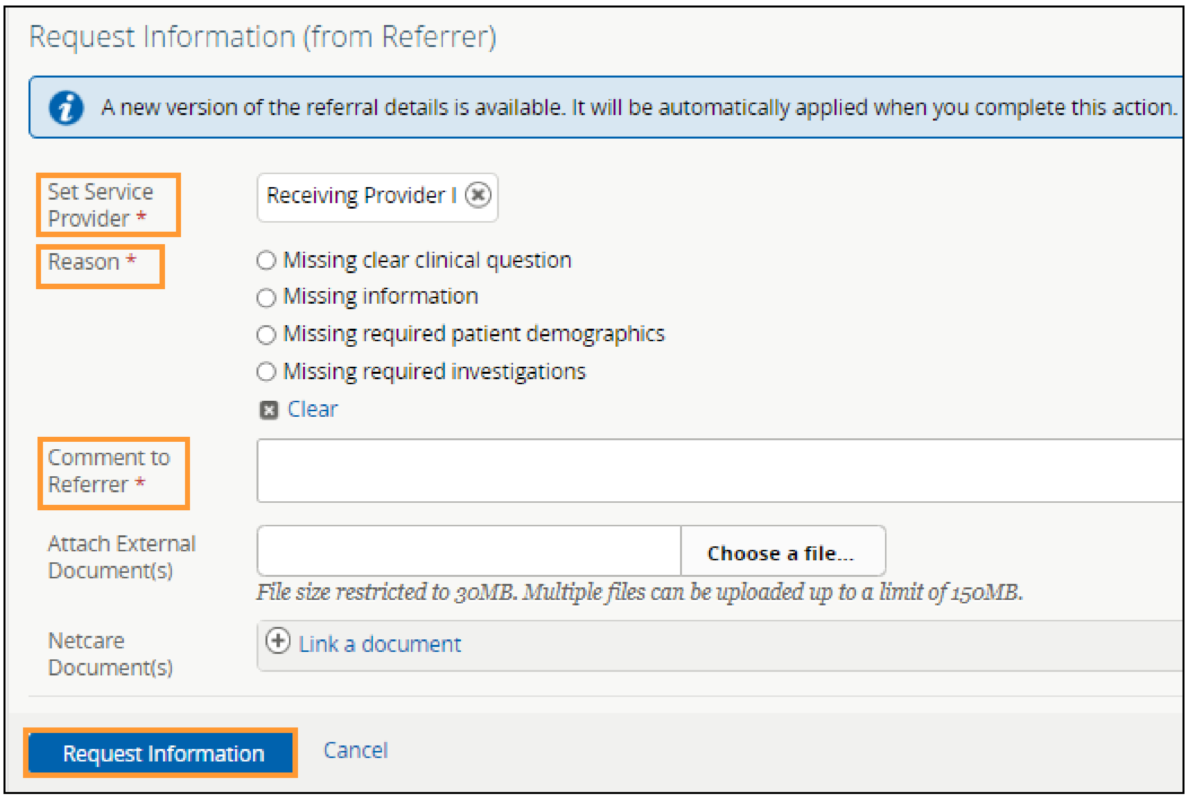


Request Additional Information from the Referring Provider

1 If you cannot provide a response and require more information to complete the eConsult, go to the ***Workflow Bar*** and select ***Communication,*** then ***Request Information (from Referrer)***.



2 Click ***Add*** to set the ***Service Provider***. Indicate the reason for requesting the information, enter any comments, attach pertinent files, and click ***Request Information (from Referrer)***.

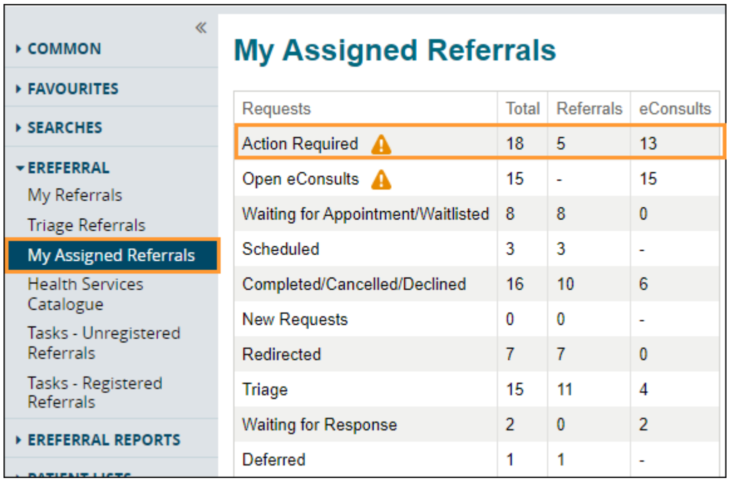


The eConsult will now appear on your ***Waiting for Response*** worklist on your ***My Assigned Referrals*** dashboard and ***Triage Referrals*** dashboard. If the referring provider has configured their eReferral Provider Notifications, they will receive an email notifying them that you have responded, and your response will appear on their ***My Referrals*** dashboard.

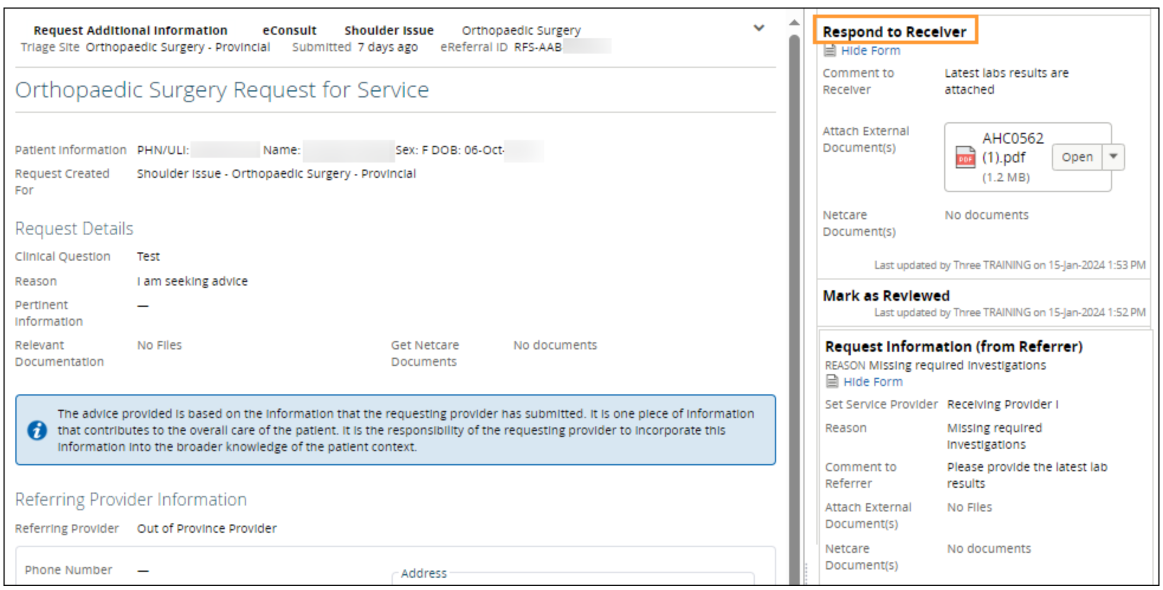
Respond to an Additional Question or Information from a Referring Provider

If a referring provider adds new information to an eConsult and requires your review, the request will appear on your ***Action Required*** worklist within the ***My Assigned Referrals*** dashboard.

1 Click on ***Action Required*** and filter on eConsults. The referral will have a panel indicating that new information has been added and requires review.

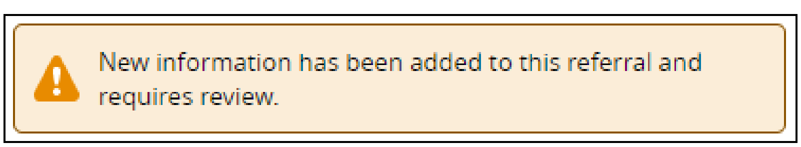


2 To review the additional information, navigate to the ***Activity*** section in the ***Right Panel*** of the eConsult. The comments/content can be viewed under ***Respond to Receiver***.

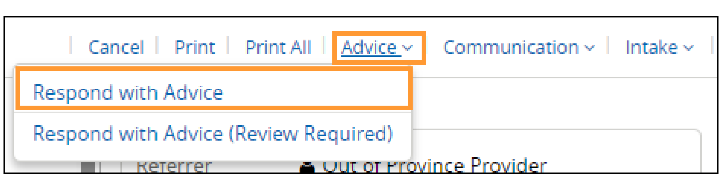


3 Once done, click ***Mark as Reviewed*** on the ***Workflow Bar***. Enter a comment and click ***Mark as Reviewed***.

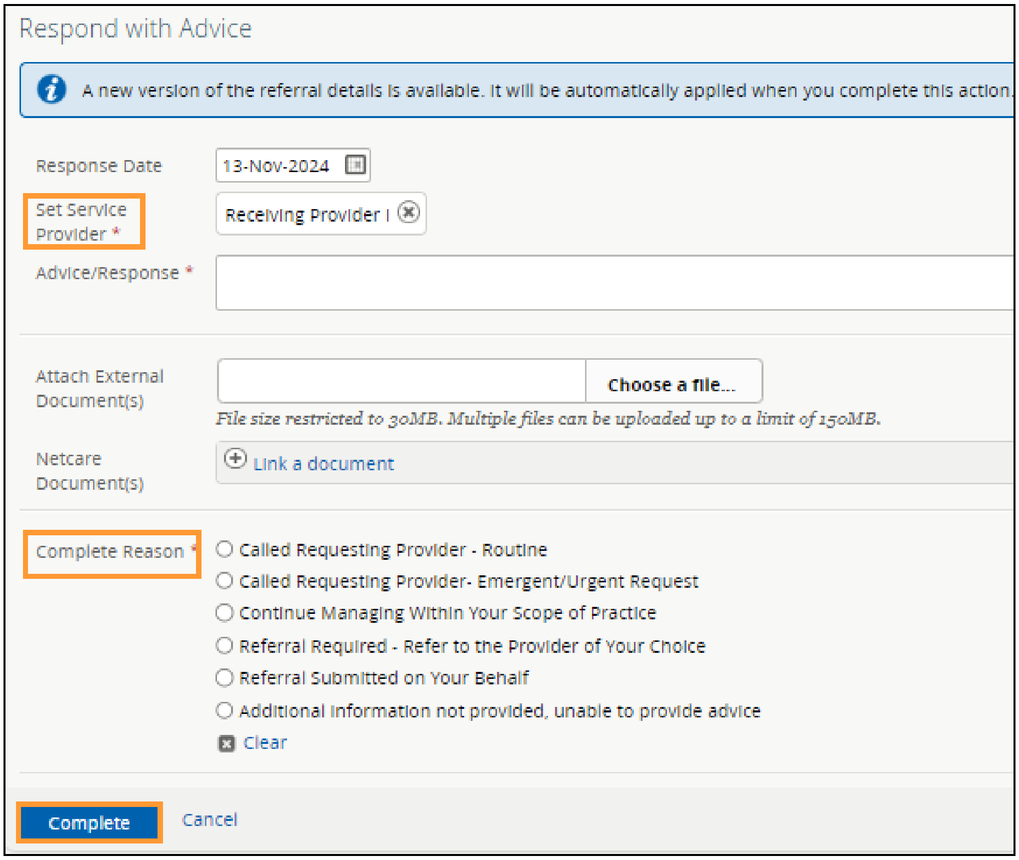
The panel indicating that new information was added to the referral will now be removed.



4 If you choose to respond after reviewing the information, click ***Respond with Advice*** on the ***Workflow Bar***.



5 Set yourself as the ***Service Provider***. Your name will populate automatically as per your ***My Details*** configuration. Enter your response and add any attachments. Choose a ***Complete Reason*** from the list provided and click ***Complete*** to finish.



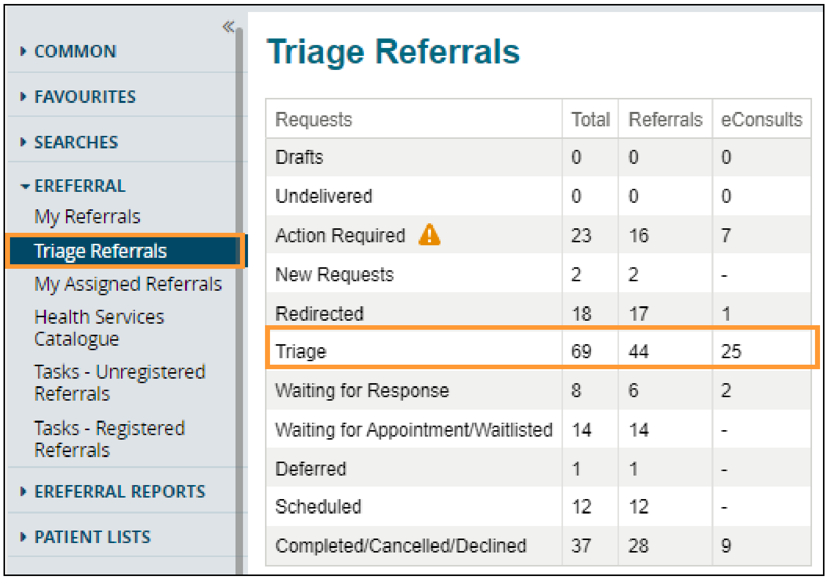
The eConsult now appears on the ***Completed/Cancelled/Declined*** worklist on the ***Triage Referrals*** and ***My Assigned Referrals*** dashboards, and the ***Completed*** worklist on the ***My Referrals*** dashboard.

Triage eConsults – Set the Service Provider

If you have triage access, you can triage eConsults using the instructions below:

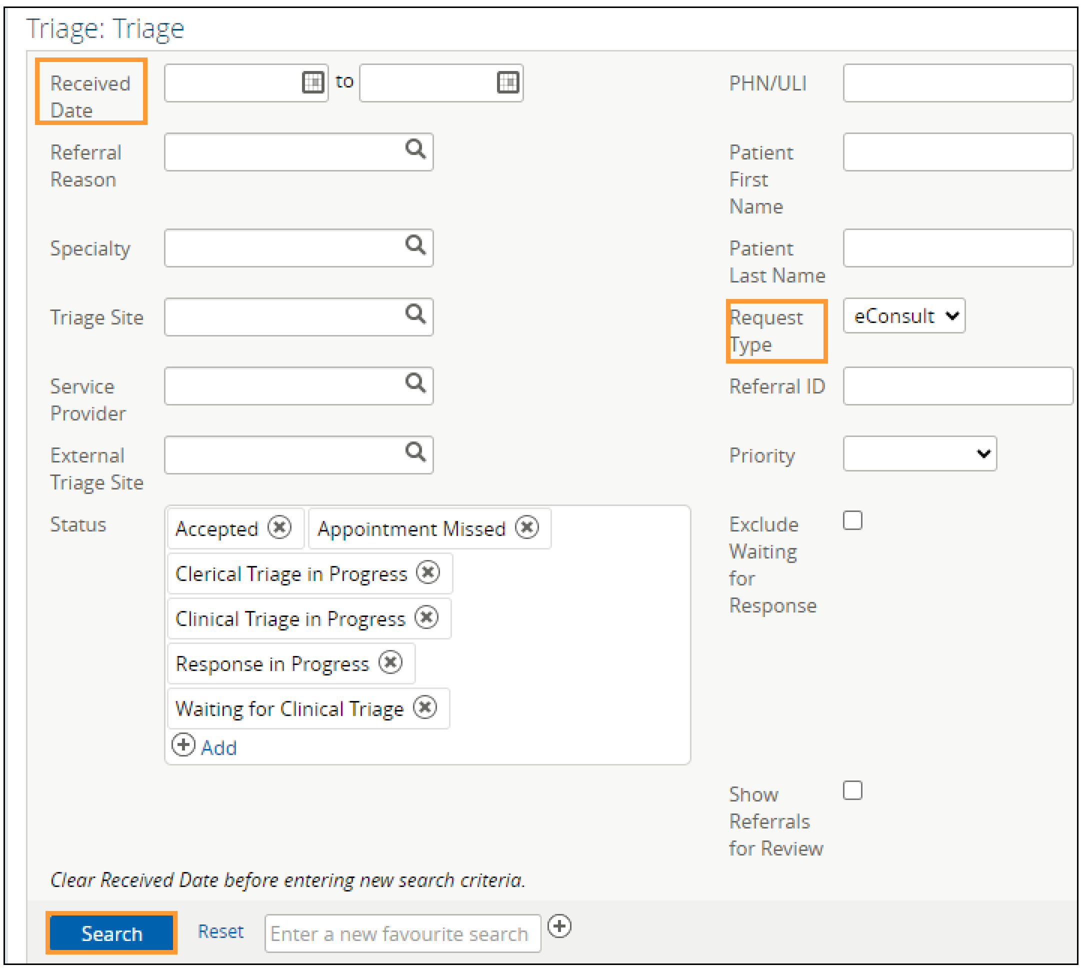
1 Select ***eReferral*** from the ***Clinical Portal Menu***, then ***Triage Referrals***.

2 Click on ***Triage***.



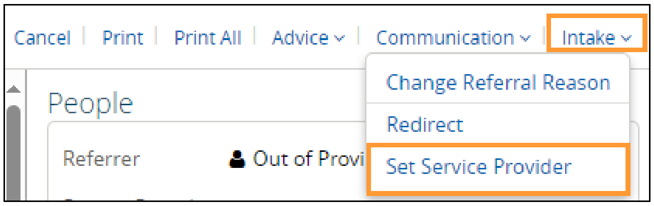
Requests	Total	Referrals	eConsults
Drafts	0	0	0
Undelivered	0	0	0
Action Required	23	16	7
New Requests	2	2	-
Redirected	18	17	1
Triage	69	44	25
Waiting for Response	8	6	2
Waiting for Appointment/Waitlisted	14	14	-
Deferred	1	1	-
Scheduled	12	12	-
Completed/Cancelled/Declined	37	28	9

3 Filter on ***eConsults*** in the ***Request Type*** section and click ***Search***. The referral ***Received Date*** has a system default date of a one-month timeframe. Clear this field if you wish to view all referrals based on your selected filter(s).

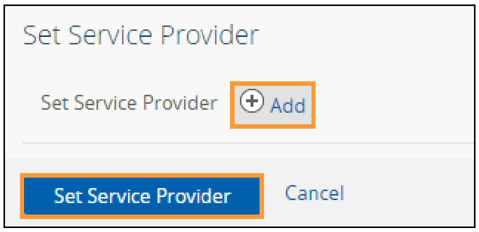


4 Click on an eConsult to view it.

5 Click ***Intake,*** then ***Set Service Provider*** on the ***Workflow Bar***.



6 Click the ***Add*** button. In the pop-up, type your name (or receiving provider's name) and select it from the list. Click ***Set Service Provider*** to finish.



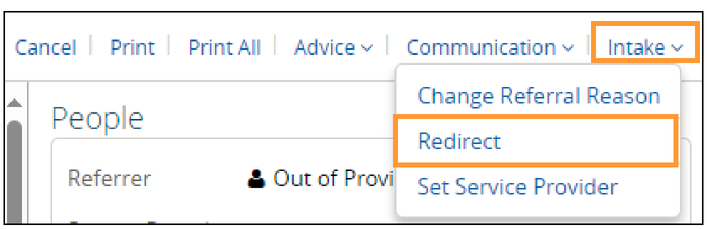
After setting the service provider, the request will show up in the selected receiving provider's ***My Assigned Referrals*** dashboard provided the receiving provider added their name to their ***My Details***. If they have configured their eReferral Provider Notifications, they will receive an email telling them a request is in eReferral for them.

Redirect an eConsult

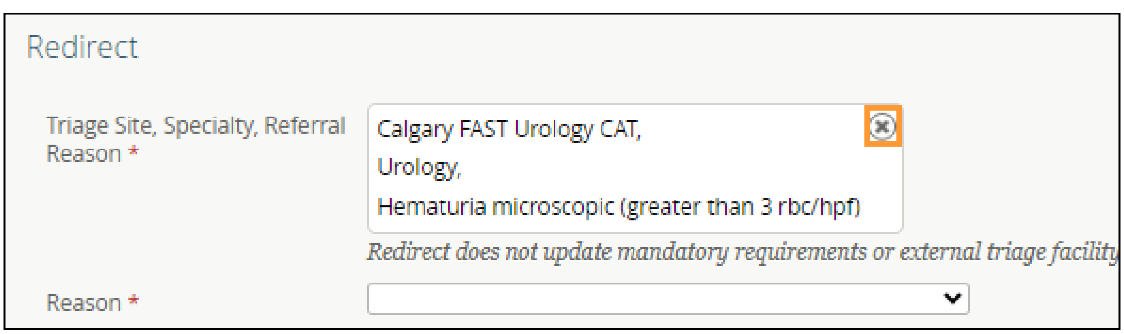
An eConsult can be redirected (previously called reassigning) to another facility if it is not appropriate based on the requested zone or if the assigned provider is not available to respond to the request within an acceptable time.

1 Open the appropriate eConsult.

2 Click ***Intake,*** then ***Redirect*** from the ***Workflow Bar.***



3 Click the ***X*** to clear the current information.

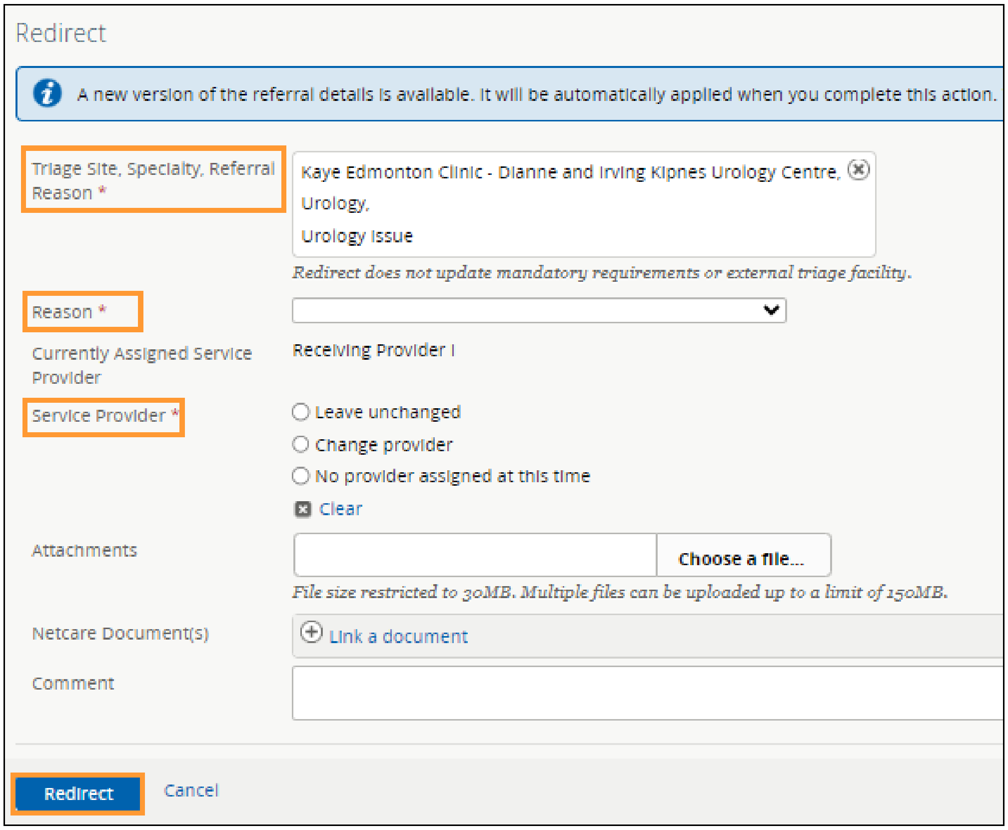


4 Click ***Add***. Enter the original ***Referral Reason*** if you want to retain this or enter a new one if you need to change the ***Referral Reason***.

5 Select the appropriate ***Reason***.

6 Select the ***Service Provider***.

7 Click ***Redirect***.



The request will now appear on the chosen service's ***Triage Referrals*** dashboard - ***Redirected*** worklist and will disappear from your ***My Referrals*** dashboards.