EMR eConsult

Requirements

May 31, 2021

Document Version & Status: 2.3 – Final

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1. INTRODUCTION

1.1 Document Overview

This document provides the information necessary to integrate the provincial eConsult Service functionality in an EMR Offering.

1.2 Version History

VERSION	REVISION DATE	REVISION NOTES
1.0	2018-05-17	Initial Draft version (with the status of Draft for Use)
2.0	2019-03-05	Added/updated requirements to include BASE Managed Specialty Delivery Model functionality
2.1	2019-04-01	Specification status changed to Final
2.2	2020-10-26	a) Update references to OTN organization to Ontario Health (OTN) b) Renumbered requirements to account for new requirements c) Changes resulting from feedback received i) Added ECS01.04 to identify additional metadata to store relating to an eConsult ii) Added ECS02.02 to separate actions that can be executed on an initial eConsult iii) Added ECS02.03 to identify saving an initial eConsult draft. iv) Added ECS02.09 to include billing coverage information v) Updated ECS04.01 to support eConsult “Patient Needs to be Seen” flag vi) Added ECS04.03 to include requirements to relate file attachments to their respective eConsult message vii) Added ECS04.10 to include the ability to group eConsults by status viii) Added ECS07.02 to include functionality to search for an existing patient with which to associate an eConsult ix) Added ECS08.01 to explicitly define response eConsult actions. x) Added ECS10.03 to include handling of network errors xi) Added ECS11.03 to include processing of eConsult Activity Reports xii) Added ECS12.01 to include eConsult logging and auditing requirements
2.3	2021-05-31	a) Corrected various formatting issues and errata. b) Updated content to reflect eConsult service migration from HIAL to OAG hosting. c) Updated ECS01.03 for clarity on eConsult metadata associated with a patient. d) Updated ECS02.03 for clarity on saving an initial eConsult. e) Updated ECS02.14 to explicitly state functionality for assigning an eConsult to a provider and applicable search parameters.

VERSION	REVISION DATE	REVISION NOTES
		f) Added ECS02.15 to explicitly state the functionality for assigning an eConsult to a group and applicable search parameters. The previous version contained group and provider assigning within ECS02.14. g) Re-sequenced ECS02.16 to ECS02.20 to account for new requirement (ECS02.15). h) Updated ECS04.04 for clarity on when the automated saving process begins. i) Updated ECS04.05 and ECS04.06 for clarity to sort and filter functionalities occurring within the EMR Offering.

1.3 EMR Specification Scope

1.3.1 In Scope

- Functional and non-functional requirements to implement the eConsult Service within an EMR Offering.

1.3.2 Out of Scope

- Business processes to onboard EMR Offerings and users to connect to the eConsult Service.
- Specific information relating to accessing eConsult outside the EMR Offering.

1.3.3 Prerequisites

To streamline the user experience, maintain security and safeguard privacy, an EMR Offering must adhere to the most current EMR EHR Connectivity Specification in order to connect to the provincial eConsult service.

1.4 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 Interface Specification (Ontario Health (OTN), 2019) https://otn.ca/api-support/#econsult	2.1	2019-03-29
EMR EHR Connectivity Specification (OntarioMD, 2021) https://www.ontariomd.ca/emr-certification/emr-specification/library	2.3	2021-03-08

2. EMR REQUIREMENTS

The following terms and abbreviations are defined and shall be applied to all tables within this section.

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 #:

A 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 EMR 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 except where otherwise stated.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS01.01	The EMR Offering MUST have the functionality to perform eConsult functions from the patient chart.	The EMR Offering MUST have the functionality to allow the EMR user to perform the following functions: a) Create an initial eConsult b) View all eConsults associated with the patient c) Search for eConsults d) Re-assign an eConsult e) Print an eConsult f) Disassociate an eConsult from the patient (if applicable) g) Action an eConsult "Create an initial eConsult" does not apply to respondents and respondent delegates. **Note**: An initial eConsult is a draft eConsult not yet submitted to the eConsult Service and is stored by the EMR Offering. A draft is intended for the EMR user to save an eConsult prior to having populated all mandatory fields before submitting the eConsult to the eConsult Service. **Note**: Each function above is described in more detail in subsequent sections of this document.	M	P
ECS01.02	The EMR Offering MUST have the functionality to manage eConsults from the EMR user's work queue.	The EMR Offering MUST have the functionality to perform the following functions: a) Create an initial eConsult	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		b) View all eConsults associated with the EMR user (as the referrer or the respondent) c) Search for eConsults d) Re-assign an eConsult e) Print an eConsult f) Associate/Disassociate an eConsult to the patient g) Action an eConsult **Note**: Each function above is described in more detail in subsequent sections of this document.		
ECS01.03	The EMR Offering MUST store eConsult metadata for each eConsult associated with a patient within the EMR Offering.	The EMR Offering MUST store the following metadata relating to each eConsult, if available: a) eConsult ID b) eConsult patient demographics: i. First and last name ii. Date of birth iii. Gender c) EMR Offering unique patient ID d) Referrer name e) Respondent name f) Respondent specialty g) Respondent sub-specialty h) Respondent group or organization name i) Author name j) Initial eConsult Creation date k) eConsult Subject Line l) eConsult State m) Attachment file name and description The above metadata SHOULD be accessible from the patient chart.	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Refer to the eConsult Interface Specification for details relating to the eConsult State. **Note**: The Respondent name may be either the provider's name, group name or specialty depending on the eConsult delivery model. **Note:** The author name refers to the name of the EMR user who created or authored the eConsult. For example, a referrer delegate can act on behalf of the referrer to create an eConsult.		
ECS01.04	The EMR Offering MUST store additional eConsult metadata for each eConsult.	The EMR Offering SHOULD additionally store the following metadata relating to each eConsult associated with a patient within the EMR Offering, if available: a) Billing coverage information b) eConsult flag c) Saved flag d) Patient association flag e) eConsult retrieval date and time The above metadata SHOULD be accessible from the patient chart if the eConsult patient is associated to a patient in the EMR Offering. The eConsult flag can only be set by respondents and respondent delegates. Refer to the "otn.flag" in the eConsult Interface Specification for information relating to the eConsult flag. Refer to "OHIP" and "insurer" in the eConsult Interface Specification for details relating to billing coverage information.	O	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Note: The "saved flag" is maintained by the EMR Offering to track if a copy of the eConsult has been saved to the patient chart in the EMR Offering. **Note:** The "patient association flag" is maintained by the EMR Offering to track if an eConsult has been associated or linked to a matching patient in the EMR Offering.		

2.2 Create Initial eConsult

An initial eConsult is an eConsult request created by a referrer or referrer delegate not yet submitted to the eConsult Service and is stored in the EMR Offering. It is intended for the EMR user to save an eConsult prior to having populated all mandatory fields before submitting the eConsult to the eConsult Service. Once successfully submitted to the eConsult Service, a unique eConsult ID will be returned for tracking purposes where the submitted eConsult information cannot be modified. This section defines requirements when creating or interacting with an initial eConsult.

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.01	The EMR Offering MUST have the functionality to accept input of information to create an initial eConsult.	The EMR Offering MUST present the following eConsult fields to the EMR user to create an initial eConsult: a) Referrer and author name (refer to ECS02.04) b) Referrer Delegate selection (refer to ECS02.05) c) eConsult delivery model selection (refer to ECS02.06) d) Respondent selection (refer to ECS02.07) e) Patient information (refer to ECS02.08) f) Billing coverage information (refer to ECS02.09) g) eConsult Subject Line (refer to ECS02.10) h) eConsult note (refer to ECS02.11) i) eConsult attachment (refer to ECS02.17)	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Refer to the “Assign eConsult (Delivery Models)” section of this document for an explanation of the different eConsult delivery models. **Note**: An eConsult may be referred to as a “case” in other documentation or context. A respondent may be referred to as a “recipient” or “specialist” in other documentation or context.		
ECS02.02	The EMR Offering MUST have the functionality to action an initial eConsult.	The EMR Offering MUST have the following functionality to allow the EMR user to action an initial eConsult: a) Submit an initial eConsult to the eConsult Service (Refer to the “Submit eConsult” section of this document) b) Save a draft eConsult in the EMR Offering (Refer to the “eConsult Draft” section of this document) c) Discard an initial eConsult (refer to ECS02.13) The EMR Offering MUST only allow submitting an eConsult once all mandatory fields are populated. Refer to “Create Initial eConsult” in the eConsult Interface Specification for the list of the mandatory fields. **Note**: Once an eConsult is successfully submitted to the eConsult Service, a unique eConsult ID will be returned for tracking purposes, and the submitted eConsult information cannot be modified.	M	P
ECS02.03	The EMR Offering MUST have the functionality to allow the EMR user to save an initial eConsult.	The EMR Offering MUST have the functionality for the EMR user to be able to save an initial eConsult that is submitted to the eConsult service, within the EMR Offering.	M	U
ECS02.04	The EMR Offering MUST automatically populate the referrer and author information when creating an initial eConsult.	At a minimum, the EMR Offering MUST automatically populate the following information: a) Author first name b) Author last name c) Referrer’s first name d) Referrer’s last name	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		The referrer and author name MUST NOT be manually editable. **Note:** The author is the EMR user who created or last saved an initial eConsult draft. The author is typically the referrer, but not necessarily always the case.		
ECS02.05	The EMR Offering MUST provide the functionality for a referrer delegate to select from their list of referrers when creating an initial eConsult.	The EMR Offering MUST have functionality for a referrer delegate to select a referrer name from a selection of eligible referrer delegates. The list of referrers MUST consist of the list of referrers for that respective referrer delegate, retrieved from the eConsult Service, and display the first and last name of each referrer returned. Refer to "Search Delegators" in the eConsult Interface Specification for more information on retrieving a list of eligible delegators assigned to an EMR user. The EMR Offering SHOULD automatically populate the referrer name (without providing a selection) where the referrer delegate has only one referrer delegate. This functionality MUST NOT require a referrer (who is not a delegate) to make a selection. It is recommended that this functionality not be available to referrers who are not delegates. **Note**: A referrer delegate will have one or more referrers on whose behalf they act.	M	P
ECS02.06	The EMR Offering MUST provide a selection of the eConsult delivery models when creating an initial eConsult.	The EMR Offering MUST provide the following eConsult delivery model values as options to select when creating an eConsult: a) Specific Provider or Group	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		b) BASE Managed Specialty The EMR user MUST be required to select one of the above values before submitting an eConsult. Refer to the “Assign eConsult (Delivery Models)” section of this document.		
ECS02.07	The EMR Offering MUST provide a selection of the respondent when creating an initial eConsult.	The delivery model chosen will determine which fields are required when selecting a respondent. The EMR Offering MUST prompt for only the relevant fields for the selected delivery model. Refer to the “Assign eConsult (Delivery Models)” section to determine the specific requirements to support each delivery model.	M	P
ECS02.08	The EMR Offering MUST automatically populate the patient information when creating an initial eConsult.	The EMR Offering MUST automatically populate and display the following patient information fields, if available: a) First name b) Middle name c) Last name d) Date of birth e) Gender f) Health card number (HCN) g) HCN version code The patient information MUST NOT be editable when creating an initial eConsult. The patient information MUST be information maintained by the EMR Offering. **Note**: HCN may be referred to as the Ontario Health Insurance Plan (OHIP) in other documents or contexts.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.09	The EMR Offering MUST have the functionality to populate the billing coverage information when creating an initial eConsult.	The EMR user MUST have the ability for the EMR user to select the following billing coverage types: a) OHIP coverage b) Non-OHIP coverage Where an EMR user selects OHIP coverage, the EMR Offering MUST automatically populate the following fields: a) Health card number (HCN) b) HCN version code If the HCN or HCN version code is unavailable, the EMR Offering MUST provide a means to alternatively accept an optional insurer name and number (Non-OHIP coverage). Where no insurer name and number are provided by the EMR user, The EMR Offering MUST populate a value of "N/A" to submit the eConsult to indicate that neither the HCN nor the insurer information is available. Refer to the "Coverage" resource in the eConsult Interface Specification for more details.	M	P
ECS02.10	The EMR Offering MUST have the functionality to provide an eConsult Subject Line when creating an initial eConsult.	The EMR Offering MUST allow and require the EMR user to populate the eConsult Subject Line. The eConsult Subject Line is mandatory and MUST NOT be blank when submitted to the eConsult Service. Refer to the "ReferralRequest.url extension", or "title of the case" in the "ReferralRequest Profile (Create Case)" in the eConsult Interface Specification for more details relating to the eConsult Subject Line.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Important: The eConsult Subject Line is bound to certain character limits. Refer to "ReferralRequest Profile" the eConsult Interface Specification for more details on the eConsult Subject Line character limits. **Note**: The eConsult Subject Line is textual information for the EMR user to provide a high-level description of an eConsult. **Note**: eConsults in the OTNhub do not support an eConsult Subject Line. eConsult created in the EMR Offering will not display the eConsult Subject Lines in the OTNhub. Conversely, an eConsult created in the OTNhub will not have an eConsult Subject Line when retrieved by the EMR Offering.		
ECS02.11	The EMR Offering MUST have the functionality to allow the EMR user to enter an eConsult note when creating an eConsult.	The eConsult note is mandatory and MUST NOT be blank when submitted to the eConsult Service. **Important:** The eConsult note is bound to certain character limits. Refer to "ReferralRequest Profile" in the eConsult Interface Specification for more details on eConsult note character limits. **Note**: OTNhub concatenates the eConsult Subject Line and eConsult note when receiving eConsult requests from the EMR Offering.	M	P
ECS02.12	The EMR Offering MUST have the functionality to include existing patient health records to an eConsult note when creating an eConsult.	The EMR Offering MUST have the functionality to allow the EMR user to select clinical data from the patient record residing in the EMR Offering to include in an eConsult note. At a minimum, the EMR user MUST be able to include one or more of the following MUST be supported: a) Cumulative patient profile (CPP) data b) Lab reports c) Progress notes (encounter notes) d) Consultation notes (received) e) External reports	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.13	The EMR Offering MUST have the functionality to discard an initial eConsult.	The EMR Offering MUST allow the EMR user to be able to discard an initial eConsult at any point prior to it being submitted to the eConsult Service. Any saved copies of the initial eConsult in the EMR Offering MUST be deleted when an eConsult is discarded.	M	P

2.2.1 Assign eConsult (Delivery Models)

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

a) **The BASE Managed Specialty**

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

b) **Specific Provider or Organization/Group**

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

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.14	Where the EMR user selects the Specific Provider to assign an eConsult, the EMR Offering MUST be able to search the eConsult Service's directory of provisioned specialist providers when selecting a respondent for an initial eConsult.	The initial eConsult MUST retrieve the list of available respondents from the eConsult Service. The eConsult creation form MUST have a search function that enables an EMR user to search for a specialist provider through a "Standard Search."	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		The EMR Offering SHOULD provide an alternative "Advanced Search" for specialist providers by the following characteristics in the specialist profile (where applicable): a) Last name b) Specialist's city c) Specialty d) Organization The EMR Offering MUST also ensure that: a) Search results MUST be retrieved from the eConsult Service. b) Search results that match the standard or advanced search criteria MUST be presented to the EMR user, including the specialist provider availability. c) The EMR user MUST be able to select one specialist from the search result. d) The EMR user MUST be able to assign a selected specialist. e) Additional information that is associated with the specific provider as part of the search results MUST be displayed. Examples include but are not limited to: I. Specialist Conditions II. Telemedicine Service III. Restrictions for the Specific Provider The EMR Offering MUST allow the EMR user to cancel and re-initiate the search process at any time. Refer to "Search Recipient" in the eConsult Interface Specification for more information on how to retrieve a list of assignees pertaining to the Specific Provider or Group delivery model.		

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Refer to "Practitioner" in the eConsult Interface Specification for more information on practitioner search parameters. **Important**: Running a search without entering the minimum number of characters will result in an error. Refer to the "OperationOutcome" section in the eConsult Interface Specification for more information on error codes associated with searches.		
ECS02.15	Where the EMR user selects the Specific Group to assign an eConsult, the EMR Offering MUST be able to search the eConsult Service's directory of provisioned specialty organizations/groups when selecting a respondent for an initial eConsult.	The initial eConsult MUST retrieve the list of available respondent groups from the eConsult Service. The eConsult creation form MUST have a search function that enables an EMR user to search for a specialty group through a "Standard Search." The EMR Offering SHOULD provide an alternative "Advanced Search" for specialty organizations/groups by the following characteristics in the specialty group profile (where applicable): a) Specialty b) Organization name The EMR Offering MUST also ensure that: a) Search results MUST be retrieved from the eConsult Service. b) Search results that match the standard or advanced search criteria MUST be presented to the EMR user including the organization/group availability. c) The EMR user MUST be able to select one specialist group from the search result. d) The EMR user MUST be able to assign a selected specialist group e) Additional information that is associated with the organization/group as part of the search results MUST be displayed. Examples include but are not limited to: I. Specialist Group Conditions	M	N

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		II. Telemedicine Service III. Specialty Group Conditions IV. Description for the Organization/Group The EMR Offering MUST allow the EMR user to cancel and re-initiate the search process at any time. Refer to “Search Recipient” in the eConsult Interface Specification for more information on how to retrieve a list of assignees pertaining to the Specific Provider or Group delivery model. Refer to “Organization” in the eConsult Interface Specification for more information on organization search parameters. **Important**: Running a search without entering the minimum number of characters will result in an error. Refer to “OperationOutcome” section in the eConsult Interface Specification for more information on error codes associated with searches.		
ECS02.16	Where the EMR user selects the BASE Managed Specialty delivery model to assign an eConsult, the EMR Offering MUST be able to retrieve the list of BASE managed specialties and sub-specialties.	Where the EMR user selects the BASE Managed Specialty, the EMR Offering MUST: a) Prompt the EMR user to select from a standardized taxonomy for Specialty Category and Specialty Option in the initial eConsult. b) Allow the EMR user to select a value from the standardized taxonomy. c) Initiate a search to find BASE Managed Specialties that provide services for the selected specialty and sub-specialty based on the EMR user selection. For details, refer to “HealthcareService” in the eConsult Interface Specification. d) Present the results of the “Search HealthcareService” to the EMR user based on matched criteria. e) Display additional information associated with the specialty and sub-specialty if the information is returned as part of the search results. At a	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		minimum, one or more of the following additional pieces of information MUST be included but are not limited to: I. Specialist Conditions II. Telemedicine Service III. Restrictions f) Allow the EMR user to select a specialty and subspecialty from the search results. Refer to the “Search HealthcareService” section in the eConsult Interface Specification for the data returned by search results. **Note**: If a specialty group is selected by the EMR user, the eConsult Service will assign a respondent to the eConsult.		

2.2.2 Attach File to eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.17	The EMR Offering MUST have the functionality to attach files to a new eConsult.	When creating an eConsult, the EMR user MUST have the ability to attach files to the eConsult for submission to the eConsult Service. The EMR Offering MUST allow the EMR user to enter a description of the file. The EMR Offering MUST NOT limit the number of files that can be attached per eConsult. The EMR Offering MUST prevent attachments of file formats that are not supported. Once an eConsult is submitted, attachments cannot be edited, modified, or deleted. Attachments cannot be disassociated (removed/deleted) from an eConsult message. The EMR user MUST NOT be able to attach files on a cancelled or completed eConsult. Refer to “File Operations” in the eConsult Interface Specification for implementation details for attaching files to, and retrieving attached files from, an eConsult AND for “Supported File Types” for the list of accepted file types supported.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Important: There is no limit set by the 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 the future.		

2.2.3 eConsult Draft

When an eConsult is created and while it is being drafted, the eConsult exists within the EMR Offering. Once an eConsult has all the desired and necessary information, it may be submitted to the eConsult Service.

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.18	The EMR Offering MUST have the functionality to save an initial eConsult in a draft state, prior to submitting the eConsult.	The EMR Offering MUST have the ability to save current eConsult information within the EMR Offering at any point before the successful submission of the eConsult to the eConsult Service. Any EMR user authorized to view the patient record MUST be able to view eConsult drafts for that patient. EMR users who are authorized to edit the patient record MUST be able to edit draft eConsults (e.g., a delegate of the referrer that created the draft eConsult).	M	P
ECS02.19	The EMR Offering MUST have the functionality to discard an initial eConsult in a draft state.	The EMR Offering MUST provide the ability to discard an initial eConsult at any point before submitting an eConsult to the eConsult Service. **Note**: Refer to the “Cancel eConsult” section of this document for the functionality to cancel an eConsult *after* it has been submitted.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS02.20	The EMR Offering MUST have the functionality to edit an initial eConsult.	The EMR Offering MUST have the functionality to allow the EMR user to be able to retrieve an initial eConsult that is in a draft state, for further edits, before submitting the eConsult. The EMR Offering MUST ensure the following information is editable: a) eConsult Subject Line b) eConsult note c) Billing Coverage information d) eConsult attachments e) Respondent information eConsult drafts associated with a patient in the EMR Offering MUST be accessible from within the patient record and the EMR user's work queue.	M	P

2.3 Submit eConsult

Once an eConsult has all the desired and necessary information populated, it may be submitted to the eConsult Service, at which point, the eConsult persists within the eConsult Service.

Important: All requirements in the table below apply only to referrers, referrer delegates, respondents, and respondent delegates except where otherwise stated.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS03.01	The EMR Offering MUST have the functionality to allow the EMR user to submit an eConsult to the eConsult Service.	The EMR Offering MUST allow submission of the eConsult to the eConsult Service. The EMR Offering MUST validate that all information required to successfully submit an eConsult to the eConsult Service has been obtained.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Where mandatory information is missing, the EMR Offering MUST prompt the EMR user to fill in the mandatory information before submitting the eConsult. The EMR Offering MUST ensure that eConsults are not editable once successfully accepted by the eConsult Service. Once successfully submitted, the eConsult draft MUST be removed from the EMR Offering. The EMR Offering MUST save the eConsult ID assigned to a successfully submitted eConsult. **Important:** eConsults submitted to the eConsult Service MUST be accessible from the patient record and the EMR user's work queue if associated with an existing patient in the EMR Offering. Refer to "ReferralRequest Profile (Create Case)" in the eConsult Interface Specification for details to submit an eConsult.		
ECS03.02	The EMR Offering MUST store the metadata about a successfully submitted eConsult.	The following eConsult metadata MUST be stored within the EMR system for all eConsults associated with a patient record within the EMR system: a) eConsult ID b) Referrer name c) Respondent name d) Creation date e) eConsult Subject Line The above information MUST be logged for auditing purposes following the College of Physicians and Surgeons of Ontario (CPSO) requirements.	M	P

2.4 View eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS04.01	The EMR Offering MUST display all eConsults associated with 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: a) Patient name b) Referrer name c) Respondent name d) eConsult State e) eConsult submission date f) eConsult Subject Line g) eConsult ID h) Billing coverage information i) eConsult status j) eConsult Patient Needs to be Seen flag (if applicable) k) Patient association flag The EMR Offering SHOULD display the following data: a) Author name b) eConsult flag c) Indicate that an eConsult has one or more attachments For delegates, an associated eConsult includes any eConsult submitted by, or for their delegator(s). The EMR Offering MUST be able to display the eConsult for a specific patient from the patient record and the EMR user work queue. The EMR user MUST be able to see all eConsult messages associated with an eConsult.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		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 current data for an eConsult, as maintained by the eConsult Service, MUST be displayed. Refer to the eConsult Interface Specification for information relating to the “Patient Needs to be Seen” flag.		
ECS04.02	The EMR Offering MUST be able to render supported eConsult file attachments.	The EMR Offering MUST be able to render (e.g., display) any supported file attachments in an eConsult. The EMR Offering MUST also display the following stored metadata about the file attachment: a) Filename b) File type c) File description The EMR Offering MUST inform the EMR user if a file attachment cannot be rendered. **Note**: For the list of supported file types that can be attached to an eConsult, refer to the “Supported File Types” in the eConsult Interface Specification.	M	P
ECS04.03	The EMR Offering MUST be able to identify which eConsult message each file attachment pertains to.	When rendering (e.g., displaying) any supported file attachment in an eConsult, the EMR Offering MUST identify to which specific eConsult message the file attachment was originally attached.	M	P
ECS04.04	The EMR Offering MUST have the ability to save a copy of a completed eConsult to the patient record in the EMR Offering.	The EMR Offering MUST provide the EMR user with a choice whether to save a copy of the completed eConsult. The EMR Offering MUST:	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		a) allow the EMR user to view the saved eConsult from the EMR user's work queue. b) allow EMR users who are authorized to view the patient to access the saved eConsult. The EMR Offering SHOULD indicate to the EMR user that an eConsult is saved using the Saved Flag. When the EMR user chooses to save a copy of the completed eConsult, the process of saving the completed eConsult to the associated patient record within the EMR Offering MUST be automated and not require EMR user interaction. The copy MUST include all information from the eConsult including all eConsult metadata. **Note**: The "Saved Flag" is maintained by the EMR Offering to track whether a copy of the eConsult has been saved to the patient chart in the EMR Offering.		
ECS04.05	The EMR Offering MUST have the functionality to allow the EMR user to sort the list of eConsults retrieved from the eConsult Service.	The EMR Offering MUST allow the EMR user to sort and display the list of eConsults by any of the following order: a) Patient name b) Referrer name c) Respondent name d) eConsult State e) eConsult creation date f) eConsult last updated date g) eConsult Subject Line The EMR Offering MUST: a) indicate to the EMR user which elements are being actively sorted.	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		b) allow the EMR user to clear all sorting. The EMR Offering MUST allow the EMR user to sort by ascending and descending order. **Important:** The sorting functionality is not a search functionality within the OTN eConsult; sorting MUST be performed within the EMR Offering. Refer to the eConsult Interface Specification for information relating to the "Patient Needs to be Seen" flag. **Note:** Sorting is applicable on all eConsults.		
ECS04.06	The EMR Offering MUST have the functionality to allow the EMR user to filter the list of eConsults retrieved from the eConsult Service.	The EMR Offering MUST allow the EMR user to filter and display the list of eConsults, including a combination of one or more of the following criteria: a) Patient name b) Referrer name c) Respondent name d) eConsult State e) eConsult creation date f) eConsult last updated date g) eConsult flag h) eConsult Patient Needs to be Seen flag i) Saved eConsult flag j) Patient association flag The EMR Offering MUST: a) indicate which elements are being actively filtered. b) allow the EMR user to clear all filters.	M	U

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		The EMR Offering MUST allow the EMR user to filter by ascending and descending order. The EMR Offering MAY allow an EMR user to filter by the eConsult author name. The EMR Offering MUST be able to filter the eConsults within the patient record and the EMR user work queue. **Important:** The filter functionality is not a search functionality within the OTN eConsult; filtering MUST be performed within the EMR Offering. Refer to the eConsult Interface Specification for information relating to the "Patient Needs to be Seen" flag. **Note:** Filtering is applicable on all eConsults.		
ECS04.07	The EMR Offering MUST be able to display a list of all eConsults that require action.	The EMR user MUST be able to view all eConsults that require action by the EMR user.	M	P
ECS04.08	When displaying one or more eConsults, the EMR Offering MUST retrieve and display 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. The EMR Offering MAY have the functionality to refresh an eConsult, or list of eConsults through either a manual process (e.g., when the EMR user drills	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		down on a specific eConsult from a list of eConsults) or an automated process (e.g., an automatic refresh occurring at predefined time interval). When refreshing a list of eConsults, the EMR Offering MUST maintain the same sort order that was previously set by the EMR user.		
ECS04.09	The EMR Offering MUST identify an eConsult that has been associated with a patient record in the EMR Offering.	The EMR Offering MUST enable the EMR user to distinguish between an eConsult that has been associated with a specific patient record in the EMR Offering, and an eConsult that has not been associated with any patient record in the EMR Offering.	M	P
ECS04.10	The EMR Offering MUST have the functionality to automatically group eConsults retrieved from the eConsult Service.	At a minimum, the EMR Offering MUST support the following groupings: a) Action required b) Awaiting response c) Cancelled d) Declined e) Completed The EMR Offering MAY display the total number of eConsults in each group.	M	P

2.5 Search for eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS05.01	The EMR Offering MUST have the functionality to search for eConsults.	The EMR Offering MUST allow the user to be able to search for eConsults by one or more of the following search criteria: a) A date range of when eConsult(s) were submitted	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		b) eConsult State c) Referrer d) Respondent e) eConsult flag f) eConsult ID The EMR Offering MUST provide the list of all eConsults resulting from the search and allow viewing of any eConsult in that list. The eConsult flag is only applicable to respondents and respondent delegates. Refer to the “eConsult HL7 FHIR Server Functionalities” section in the eConsult Implementation Guide for more information on search parameters.		
ECS05.02	The EMR Offering MUST have the functionality to allow the EMR user to set the number of search results to display per page.	The EMR Offering MUST allow the EMR user to configure: a) Default value b) Maximum value The configuration MUST be applied at the EMR system level and restricted to specific EMR role(s) (e.g., administrative users). The configuration MAY be overridden on a per-user level. The EMR Offering MUST indicate the total number of search results returned from a search. Refer to “Pagination” in the eConsult Interface Specification for related information pagination of search results from the eConsult Service.	M	P

2.6 Print eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS06.01	The EMR Offering MUST have the functionality to allow printing an eConsult.	The printed eConsult MUST contain the following information in the header of every printed page: a) Patient name b) Patient date of birth c) Patient gender d) HCN and version code, if available e) Consultation details and transcriptions f) Identify any attachments associated with the eConsult A printed eConsult MUST contain the following information: a) eConsult ID b) eConsult Subject Line c) All eConsult notes associated with the eConsult d) File names and descriptions of all attachments associated with the eConsult if available e) eConsult creation date and time The printed eConsult MUST contain the following information in the footer of each page about the eConsult: a) page number out of the total number of pages b) print date and time The EMR Offering MUST print eConsult in chronological order beginning with the initial eConsult message.	M	P

2.7 Associate/Disassociate eConsult with Patient Record

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS07.01	The EMR Offering MUST provide the functionality to associate the eConsult to an existing EMR patient record in the EMR Offering.	The following eConsult metadata MUST be stored within the EMR system for all eConsults associated with a patient record within the EMR system: a) eConsult ID b) Referrer c) Respondent d) Patient name e) eConsult submission date f) eConsult Subject Line Where an eConsult request originated from the patient record in the EMR Offering, the EMR Offering MUST automatically associate the eConsult to that patient record. Where an eConsult request did not originate from a patient record in the EMR Offering, the EMR Offering MUST have the functionality to allow the EMR user to manually associate the eConsult to an existing patient in the EMR Offering. A unique identifier maintained by the EMR Offering MAY be stored in place of the patient name, if available. The eConsult metadata MUST be saved for logging and auditing purposes following the College of Physician and Surgeons of Ontario (CPSO) requirements.	M	P
ECS07.02	The EMR Offering MUST have the functionality to allow the EMR user to	Where an eConsult request did not originate from a patient record in the EMR Offering, the EMR Offering MUST provide the ability to search for a patient in the EMR Offering to associate with the eConsult.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
	search for a patient to associate with an eConsult.	The EMR Offering MUST display the following patient data elements as part of the returned search results: a) Patient last name b) Patient date of birth c) Gender d) HCN Where no patient record matches, the EMR Offering MUST provide the functionality to create a new patient record to associate the eConsult to the new patient.		
ECS07.03	The EMR Offering MUST provide the functionality to disassociate the eConsult from an existing patient record in the EMR Offering.	The EMR Offering MUST NOT allow the patient to be disassociated from an eConsult where the initial eConsult originated from the EMR Offering and has been submitted to the eConsult service. The eConsult MUST be removed from the patient record when it is disassociated. The EMR Offering MUST prompt the EMR user MUST enter a reason for the disassociation. Disassociating or removing an eConsult from a patient record MUST be logged for auditing purposes following the College of Physician and Surgeons of Ontario (CPSO) requirements.	M	P

2.8 Respond to eConsult

An eConsult response is provided to the referrer by the respondent. It includes drafting of the eConsult in the EMR Offering, to when it is submitted to the eConsult Service. An eConsult response is comprised of creating and updating an eConsult. As such, all requirements referenced in this section pertaining to creating and updating eConsults apply when responding to an eConsult.

Important: All requirements in the table below apply to respondents and respondent delegates except where otherwise stated.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS08.01	The EMR Offering MUST have the functionality to allow the EMR user to perform eConsult response functions.	The EMR user MUST be able to perform all update functions for an eConsult within the EMR Offering. Refer to the “Update eConsult” section of this document for more information on all the update functions. The EMR user MUST be able to perform the following actions on an initial eConsult: a) Add patient-based medical data (refer to ECS09.02) b) Cancel and discard the initial eConsult (refer to ECS02.13) c) Save the initial eConsult (refer to ECS02.03) d) Discard the initial eConsult (refer to ECS02.13) e) Edit the initial eConsult (refer to ECS02.19) f) Set the eConsult Flag (refer to ECS08.15) Refer to the “Create Initial eConsult” section of this document for more information on all the eConsult create functions.	M	P

2.9 Update eConsult

Depending on the eConsult State, different update actions are available to the EMR user. This section defines EMR Offering requirements relating 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.

Note: Any update actions, once submitted to the eConsult Service, are final and cannot be edited.

2.9.1 Attach File to Existing eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.01	The EMR Offering MUST have the functionality to attach files to an existing eConsult.	The EMR user MUST have the ability to attach files to an eConsult that has already been submitted to the eConsult Service. The EMR Offering MUST allow the EMR user to enter a description of the file. The EMR Offering MUST NOT limit the number of files that can be attached per eConsult. The EMR Offering MUST prevent attachments of file formats that are not supported. Once an eConsult is submitted, attachments cannot be edited, modified, or deleted from an eConsult message. The EMR Offering MUST NOT accept file attachments for a cancelled or completed eConsult.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Note: There is no limit set by the eConsult Service on the number of files that can be attached to an eConsult. However, a size limit exists. Refer to “Table 19 Upload file error list” in the File Operations section in the eConsult Interface Specification for the current maximum supported file size limit (currently 500 MB as of this writing but subject to change).		

2.9.2 Add Note to Existing eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.02	The EMR Offering MUST provide the functionality to add an eConsult note to an existing eConsult.	An EMR user may wish to add a note to an existing eConsult either as part of a response, requesting clarification, re-assigning, or competing. The EMR Offering MUST allow the EMR user to add an eConsult note to an existing eConsult at any time before the eConsult is completed. The EMR Offering MAY allow the EMR user to add medical data for eConsults associated with an existing patient. An eConsult note MUST be submitted to the eConsult Service. For more information, refer to “Add Note” in the eConsult Interface Specification. Only respondents and respondent delegates MUST be prompted to enter time spent to be submitted along with this function. Refer to the “Report Time Spent” section of this document for more information. **Note:** The eConsult note is bound to certain character limits. Refer to “ReferralRequest Profile” the eConsult Interface Specification for more details on eConsult note character limits. The OTNhub does not support	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		eConsult Subject Lines and will concatenate the eConsult Subject Line and eConsult note when receiving eConsult requests from the EMR Offering.		

2.9.3 Request Clarification

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.03	The EMR Offering MUST have functionality for an EMR user to request clarification after an eConsult is provided by the respondent.	Upon submitting a request for more information, all eConsult information entered in the eConsult form MUST be submitted to the eConsult Service. For more information, refer to “Request Clarification” in the eConsult Interface Specification. **Note:** Clarification can be provided as an eConsult note and an attachment.	M	P

2.9.4 Provide More Information

Important: All requirements in this table apply only to referrers and referrer delegates except where otherwise stated.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.04	The EMR Offering MUST have functionality for an EMR user to provide more information for an existing eConsult.	The EMR Offering MUST have the functionality to accept an eConsult and file attachments to provide more information for an existing eConsult. Upon submitting a request for more information, all eConsult information entered in the eConsult form MUST be submitted to the eConsult Service.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Refer to "Provide More Info" in the eConsult Interface Specification for information on how to provide more information for an eConsult.		

2.9.5 Complete eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.05	The EMR Offering MUST have the functionality to allow the EMR user to complete an eConsult after a consult is provided.	Upon selecting complete eConsult, all eConsult changes MUST be submitted to the eConsult Service. The EMR Offering MUST ensure that no further action can be taken on a completed eConsult by the EMR user. For more information, refer to "Complete eConsult" in the eConsult Interface Specification. **Note**: Once an eConsult is completed, it cannot be re-opened.	M	P
ECS09.06	The EMR Offering MUST present with survey questions upon completing an eConsult.	The "Complete Case" set of questions MUST be presented to the EMR user upon completion of an eConsult. The "Complete Case" set of questions MUST be retrieved from the eConsult Service. Hardcoding questionnaires in the EMR Offering is NOT acceptable. The responses MUST be submitted to the eConsult Service. The EMR Offering MUST allow the EMR user to cancel on selecting a value in the questionnaire and return to the eConsult.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Refer to “Key Performance Indicators (Survey Questions)” in the eConsult Interface Specification for more information to retrieve and submit the “Complete Case” set of questions. **Note:** Referrers and respondents have different survey questions to fill out. Refer to “Table 23 Questionnaire Mapping” for information on survey questions. **Note**: The survey may contain multiple questions which require free-text and/or pre-defined responses for the EMR user to input. Questions may change in the future. **Note**: Both the set of “Case Complete” survey questions mentioned in other requirements, and the “Report Time Spent” survey mentioned in this requirement reside in the “Questionnaire” resource defined in the eConsult Interface Specification.		

2.9.6 Report Time Spent

The Report Time Spent function provides a means for respondents and respondent delegates to capture the time spent to act upon an eConsult request. This information may be used for reporting, billing, or compensation purposes within the eConsult Service.

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.07	The EMR Offering MUST prompt the EMR user to enter the time spent responding to an eConsult.	The EMR Offering MUST provide the ability for the EMR user to submit the amount of time spent to action on an eConsult in the form of a questionnaire.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Reporting time spent MUST by prompted after each of the following eConsult actions: a) Provide Consult b) Request More Information c) Add Note to eConsult d) Decline eConsult To enter the amount of time spent, the EMR Offering MUST prompt the EMR user with a predefined list of available options in the questionnaire to choose from: a) 0 minutes b) 1-5 minutes c) 6-10 minutes d) 11-15 minutes e) 16-20 minutes f) 21-25 minutes g) 26+ minutes Where “26+ minutes” is selected by the EMR user, the EMR Offering MUST additionally prompt the EMR user for a specific whole number value for the number of minutes spent. Where the option of “26+ minutes” is chosen, the specific integer value MUST also be submitted. The questionnaire MUST be retrieved from the eConsult Service. Hardcoding questionnaires in the EMR Offering is NOT acceptable. The EMR Offering MUST allow the EMR user to cancel on selecting time spent and return to the eConsult.		

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		The EMR Offering MUST submit the option chosen by the EMR user to the eConsult Service.		

2.9.7 Cancel eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.08	The EMR Offering MUST have the functionality to allow the EMR user to cancel a submitted eConsult.	Upon cancelling an eConsult, changes MUST be submitted to the eConsult Service. The EMR Offering MAY prompt the EMR user to provide a reason for cancelling the eConsult if it is associated with an existing patient in the EMR Offering. The EMR Offering MUST NOT allow further eConsult action to be taken on a cancelled eConsult. For more information, refer to the “Return Case” and “Return eConsult” in the eConsult Interface Specification.	M	P

2.9.8 Re-Assign eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.09	The EMR Offering MUST have the functionality to allow the EMR user to re-assign an eConsult to a different specialist or specialty group.	When re-assigning an eConsult, the EMR Offering MUST: a) automatically cancel the existing eConsult, and b) create a new initial eConsult with data pre-populated. All fields in the eConsult request MUST be editable except the following: a) Referrer information b) Patient information The EMR Offering MUST allow the EMR user to be able to choose a different respondent to re-assign the initial eConsult. Refer to "Re-Assign" in the eConsult Interface Specification for more information on re-assignment. **Note**: The action of re-assigning an eConsult effectively consists of cancelling the existing eConsult and then starting a new eConsult using information from the previous eConsult to pre-populate, as needed.	M	P

2.9.9 Request More Information

Important: All requirements in this table apply only to respondents and respondent delegates except where otherwise stated.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.10	The EMR Offering MUST have the functionality to allow the EMR user to request more information.	If the respondent requires more clarification from the referrer, the referrer can engage in a dialogue with the respondent. Respondents can request more information for an eConsult.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Upon submitting a request for more information, all eConsult changes MUST be submitted to the eConsult Service. For more information, refer to "Request More Info (Specialist)" in the eConsult Interface Specification. Respondents and respondent delegates MUST be prompted to enter time spent to be submitted along with this function. Refer to "Report Time Spent".		

2.9.10 Decline eConsult

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.11	The EMR Offering MUST have the functionality to allow the EMR user to decline an eConsult.	Upon declining an eConsult, all eConsult changes MUST be submitted to the eConsult Service. For more information, refer to "Return eConsult (Specialist)" in the eConsult Interface Specification.	M	P
ECS09.12	The EMR Offering MUST prompt the EMR user for a reason for declining an eConsult.	The EMR Offering MUST provide the ability for a respondent or respondent delegate to submit the reason for declining an eConsult in the form of a questionnaire. One of the following reasons for declining MUST be selected by the EMR user in the questionnaire: a) Incorrect specialty b) Not available c) Other	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Additionally, the EMR Offering MUST provide the functionality for the EMR user to optionally include comments in free-form text. If the reason for “Other” is selected, then a comment by the EMR user is required. Respondents and respondent delegates MUST be prompted to enter time spent to be submitted along with this function, where the selection is either “Incorrect specialty” or “Other”. There MUST be no prompt to the user if “Not available” is selected and a value of zero minutes is submitted to the eConsult Service for the time spent. Refer to the “Report Time Spent” section of this document. The questionnaire MUST be retrieved from the eConsult Service. Hardcoding questionnaires in the EMR Offering is NOT acceptable. The EMR Offering MUST allow the EMR user to cancel on selecting a reason to decline and return to the eConsult. The EMR Offering MUST submit the option chosen by the EMR user to the eConsult Service. Refer to the “Return eConsult (Specialist)” section in the eConsult Interface Specification for more information. **Note**: The “decline eConsult” function may be called a “return case” in other documentation or context.		

2.9.11 Provide Consult

Important: All requirements in this table apply only to respondents and respondent delegates except where otherwise stated.

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.13	The EMR Offering MUST have the functionality to allow the EMR user to provide a consult within an eConsult.	The EMR user MUST be able to enter notes for the consult (refer to the "Add Note to Existing eConsult" section of this document. An accepted consult MUST be submitted to the eConsult Service. For more information, refer to "Provide Consult (specialist/respondent)" in the eConsult Interface Specification. An eConsult MUST accept only one consult. Respondents and respondent delegates MUST be prompted to enter time spent to be submitted along with this function. Refer to the "Report Time Spent" section of this document.	M	P

2.9.12 Reply to Clarification Request

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.14	The EMR Offering MUST provide the functionality to respond to clarification requests after an eConsult is provided.	Responses to an eConsult request for clarification MUST be submitted to the eConsult Service. For more information, refer to "Reply (specialist)" in the eConsult Interface Specification.	M	P

2.9.13 eConsult Flag

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS09.15	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 Interface Specification for information relating to the eConsult flag.	M	P
ECS09.16	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: a) EDUCATION b) RESEARCH c) 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 to the eConsult Service. The eConsult flag MUST be visible to the EMR user when displaying an eConsult. Refer to the “otn.flag” in the eConsult Interface Specification for information relating to the eConsult flag.	M	P
ECS09.17	The EMR Offering MUST include the eConsult flag value when printing an eConsult.	The EMR Offering MUST include the most current eConsult flag value associated with an eConsult any time the eConsult is printed.	M	P
ECS09.18	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	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		For additional eConsult search requirements, refer to the "Search for eConsults" section of this document.		

2.10 Error Handling and Warning Management

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS10.01	The EMR Offering MUST be able to manage error handling in response to any error and warning messages generated by the eConsult Service.	The EMR Offering MUST be able to notify the EMR user of any error and warning messages received from the eConsult Service at the time that the error occurs. At a minimum, the following information MUST be presented to the EMR user: a) Error message received from the eConsult Service b) EMR Offering's description of the error message c) The severity of the error as identified by the eConsult Service d) Any additional information needed for troubleshooting The EMR Offering MUST notify the EMR user initiating the transaction with the eConsult service. Refer to "OperationOutcome Resource" in the eConsult Interface Specification for error, warning, or informational messages generated by the eConsult Service.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS10.02	All error messages received from the eConsult Service MUST be logged within the EMR Offering.	The EMR Offering MUST have the functionality to allow an EMR user to review the logged error messages. The EMR Offering MAY restrict access to error messages to specific EMR user(s).	M	P
ECS10.03	The EMR Offering MUST be able to manage network issues and errors that cause eConsult Service interruptions.	The EMR Offering MUST retry to establish a network connection a finite number of times if it is not able to connect to or loses connection to the eConsult Service. The EMR Offering MUST notify the EMR user who initiated the transaction. At a minimum, the following data elements MUST be presented to the EMR user: a) Transaction date and time b) Reason for failure c) Whether the transaction was initiated by the EMR user or the EMR system The EMR Offering MAY notify the other EMR users or support staff of the network failure.	M	P

2.11 Reporting

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

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS11.01	The EMR Offering MUST have the functionality to search the eConsult Activity Report.	The EMR Offering MUST support searching by the following parameters: a) User Role i. Referrer ii. Respondent b) Date Range User role and date range are mandatory for submission to the eConsult Service. The EMR Offering MUST retrieve the eConsult Activity Report by an EMR user-defined date range (e.g., a “From” date and a “To” date). Mandatory rules when retrieving an eConsult Activity Report: a) Both “From” and “To” dates MUST be populated b) Both “From” and “To” date MUST NOT accept a future date c) The “From” date MUST chronologically precede the “To” date A date is defined as either (choose one): a) A date which is provided by the user, or b) A date that is provided by the user that aligns with the mandatory rules above. The EMR Offering MUST prompt the EMR user to fill in all mandatory fields before submitting the search parameters to the eConsult Activity Report.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Refer to the “Download Activity Report” in the eConsult Interface Specification. It is acceptable to pre-populate date and 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).		
ECS11.02	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: a) Requester b) Specialist The value of “Requester” represents the role of a referrer or referrer delegate. The value of “Specialist” represents the 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 their delegators.	M	P
ECS11.03	The EMR Offering MUST be able to process the eConsult activity report retrieved from the eConsult service.	At a minimum, the EMR Offering MUST: a) present the report in a human-readable format, and b) allow access to the report from within the EMR Offering. The EMR Offering MAY: a) allow the report to be rendered in MS Excel or similar format by default b) allow filtering of the report by: I. Date range II. Referrer Name III. Specialist name The EMR Offering MUST limit the filter options for the username to the values received in the report.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Note: The referrer name and Specialist name are field names in the eConsult Activity Report.		

2.12 Logging and Auditing

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
ECS12.01	The EMR Offering MUST log all interactions with the eConsult Service.	At a minimum, the following data MUST be saved and stored for each interaction: a) The interacting EHR Service (e.g., a value of "eConsult Service") b) Transaction identifier generated by the EMR Offering c) Transaction identifier generated by the eConsult Service (eConsult ID) d) Transaction date and time e) The EMR user (or system) that initiated the transaction f) Transaction type (e.g., submission or retrieval) g) Transaction status (e.g., success or failure) h) eConsult Service error/warning/information message i) EMR Offering error or message (e.g., missing mandatory data) The above information MUST be accessible from the EMR Offering user interface. Requiring the EMR user to search in a database or run reports to access transaction data does not satisfy the requirement. The EMR Offering SHOULD restrict access to logged information to specific EMR user role(s). The EMR Offering MUST secure and restrict access to logged information if it contains any PHI or PI.	M	P

OMD #	REQUIREMENT	GUIDELINES	M/O	STATUS
		Any additional information needed to facilitate troubleshooting and auditing MUST also be logged.		