

Triaging Referrals as eConsult (TReC) in Ocean Workflow – Receiving Sites

July 12, 2024

Triaging Referrals as eConsult (TReC) is an initiative that allows specialists to respond to incoming referrals with eConsult advice, when appropriate. This document outlines how a receiving clinic responds to a referral with eConsult advice.

Note: Receiving clinics must first complete the TReC Onboarding Checklist.

1. You will receive an email notification that you have received a new eReferral
 - a. Log into Ocean
 - b. Select “New” inbox
 - c. Select eReferral



Patient	MRN	DOB	Description	Date Sent	Source	Site	Provider	Protocol	Priority	Noted
Carla Test	80-12-01	80-12-01	Acquired Brain Injury	Apr 12, 2023 7:57 am	Carla Vallee	DEMO SCA Medical Clinic (Accuro)	DEMO: Carla's Rehabilitation Services			
Carla Test	80-12-01	80-12-01	Ultrasound	Apr 11, 2023 9:33 am	Carla Vallee	DEMO SCA Medical Clinic (Accuro)	DEMO: Carla Cares Diagnostic Imaging			
Carla Test	80-12-01	80-12-01	CT	Mar 31, 2023 7:46 am	Carla Vallee	DEMO SCA Medical Clinic (Accuro)	DEMO: Carla Cares Diagnostic Imaging			

2. Review the eReferral. You have two options to respond to the eReferral as an eConsult depending on whether you want to provide advice immediately or respond at a later time:
 - a. Option 1: Accept the eReferral as eConsult – return later to add advice and billing time.
 - b. Option 2: Accept the eReferral as eConsult and provide advice and billing time right away
3. Option 1: Accept the eReferral as an eConsult (no message to add at this time)
 - a. Navigate to the bottom of the eReferral
 - b. Select the small arrow beside “Accept”
 - c. Select “Accept as eConsult”



For: DEMO: Carla Cares Diagnostic Imaging
Sent by Carla Vallee via eReferral on Mar 31, 2023 7:46 am

Referred by: Carla Vallee
DEMO SCA Medical Clinic (Accuro)
211 Main Street
London, ON
N1N1N1
Billing # 12345678
Professional ID 1234
519-885-0000
500-000-0000

Copy of referral and status updates to:

Referral Form Summary

Generic Diagnostic Imaging eReferral Form

Patient Information

BM: 0

Allergies: No Known Allergies

Needs review: Enable Review Mode

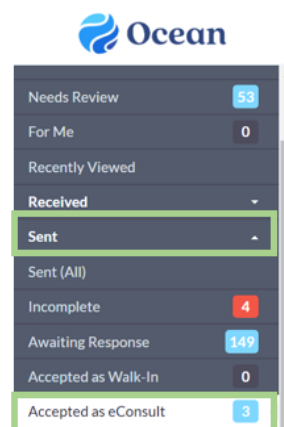
Respond as an eConsult

Accept as eConsult

You will now find the eConsult in the “Accepted as eConsult” inbox

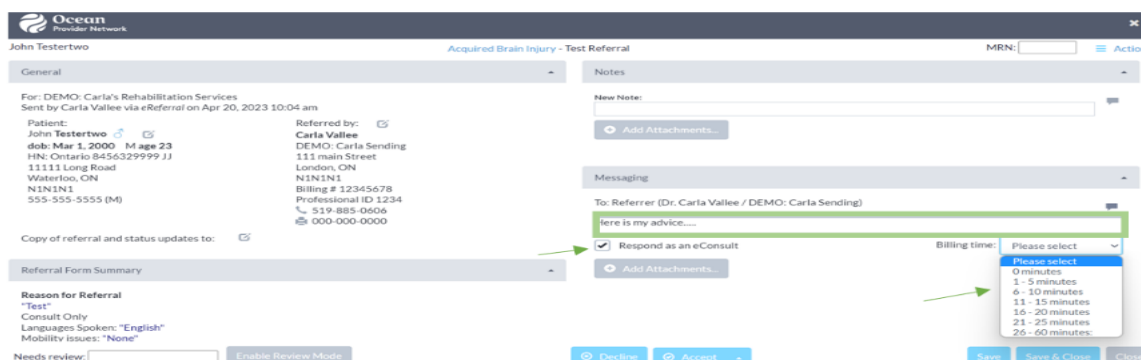


The eReferral senders will receive an email notification that you have accepted the eReferral as an eConsult, it will be filed under their “Sent” Inboxes in the “Accepted as eConsult” Folder.

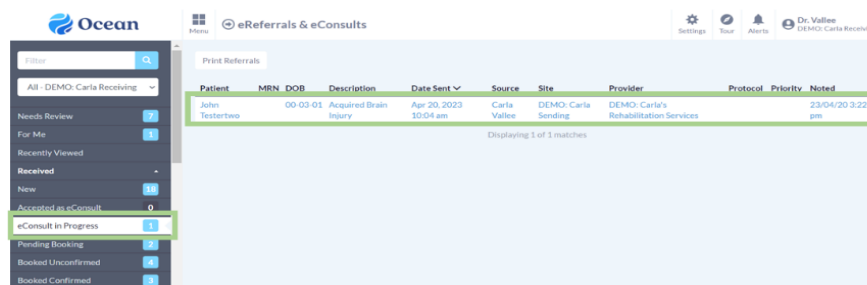


When you are ready to proceed with the eConsult, retrieve it from the “**Accepted as eConsult**” inbox (under your “**Received**” inboxes) and respond via the messaging pane in the eConsult. See Step “4” below for how to respond as an eConsult.

1. **Option 2: Respond to the eReferral as an eConsult** (Add an eConsult message and add your billing time)
 - a. Navigate to the messaging pane
 - b. Type in your advice and select “Respond as an eConsult” check-box
 - c. Select billing time from the dropdown menu (maximum 60 minutes)
 - d. Select “Send”
 - e. Select “Close”



You will now find the eConsult in the “eConsult in Progress” inbox



The eReferral sender will receive an email notification that you have responded to their eReferral as an eConsult. It will be filed in their “Needs Review” inbox **and** their “eConsult in Progress” inbox.

Unlike eReferrals – TReC in Ocean are “Completed” by the sender.

They have the option to:

- **Respond to your message** in the eConsult using the messaging pane
 - YOU may respond by providing additional consult advice or a non-consult message (*additional responses can be billed*)
- **Complete the eConsult** if they have received all the information they need.
 - eConsult will move into the “Completed” inbox.
- **Proceed with eReferral** - if they still would like you to see the patient.
 - eConsult will move into YOUR “Needs Review” and “New” inbox to be triaged.
 - **You** must click the “Reviewed and Close” button at the bottom of the eReferral first, this will remove it from the “Needs Review” inbox.
 - **THEN** retrieve it from the “New” inbox under your received inboxes and choose to “Accept” or “Decline”

Proof of Concept demo: <https://youtu.be/kZKc01hrlS4>