

## ELECTRONIC ADVICE SERVICE (e-consults) A STEP BY STEP GUIDE FOR GPs

This guide is designed to support Clinician's when using the BAtpCT Electronic Advice Service's data entry template.

The template is designed to help GPs in Bradford & Airedale to use e-consults as a way of getting a specialist opinion about the management of specific patients in certain clinical circumstances depending on agreed clinical algorithms. A pilot in the use of this service for CKD management has identified improvements in patient experience and communication between GPs and consultants.

Before you begin – if the patient who you are requesting advice for is already known to the service; either because they are already under their care, have a share in place already or you have requested an E-Consult for this patient in the past - then do **NOT** use this service.

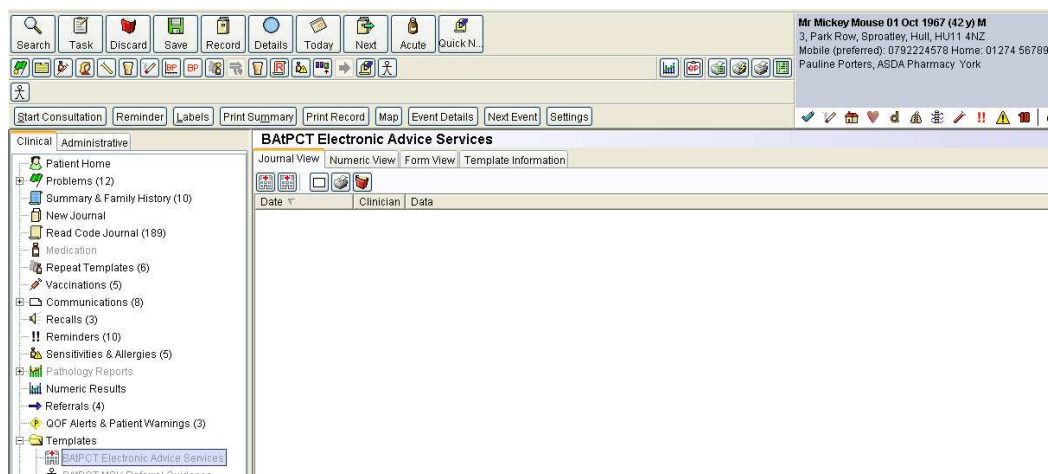
Please send the service a task to request advice.

Do **NOT** use this service for patients who are acutely ill or who require hospital admission or urgent outpatient treatment.

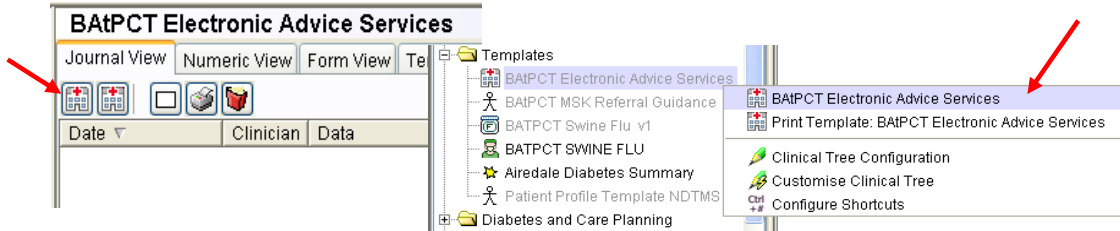
### Making an E-Consult

\*\*\*In order to view the BAtpCT Electronic Advice Services template, Practices must apply it to their Organisational clinical tree in SystemOne, if you have configured your own clinical tree then the you will need to add them to your own. If you need any support with this please contact your Data Quality Specialist. \*\*\*

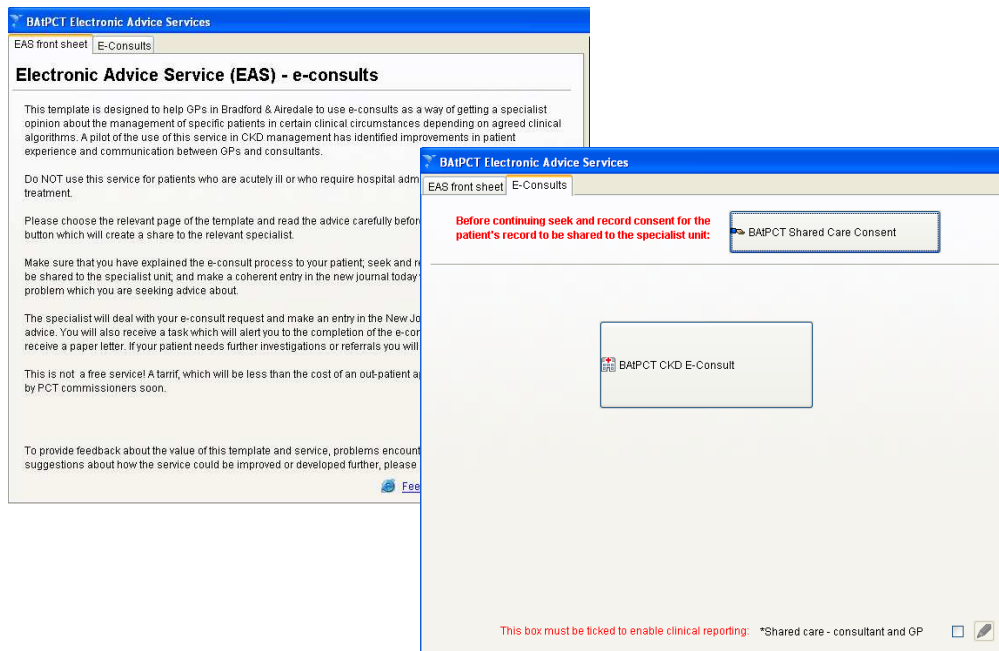
1. Open the record of the patient who you are requesting electronic advice about. From the clinical tree highlight the template named **BAtpCT Electronic Advice Services**.



- Open the template by clicking on the template's icon or from the clinical tree by right clicking the highlighted template and selecting **BAtPCT Electronic Advice Services**.

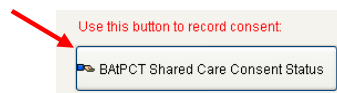


- When the template opens, please ensure you read the guidance page to ensure you are requesting advice appropriately, and then select the **E-Consults** tab.



- Next make sure that you have explained the e-consult process to your patient; seek and record consent for their record to be shared to the specialist unit.

Click the button to open the **BAtPCT Shared Care Consent Status** template and record your discussion.



**A. PLEASE HAVE THE FOLLOWING DISCUSSION WITH THE PATIENT**

**Why share records?**  
\* Sharing enables a clinician to get a full picture of all elements that affect your treatment.  
\* If some parts of your record are not available, this could adversely affect your treatment.

**Who will your records be shared with?**  
\* Your information will only be shared with the health care staff involved with your care.  
\* Security measures are in place to ensure only these health care staff can access your medical records.

**What will be shared?**  
\* Everything in your medical history will be shared, unless items are specifically marked as private.  
\* If you need to mark any item as private you should contact the service which added the item to your record.

If required, click here to print a patient information leaflet [Patient information leaflet](#)

**B. ASK THE PATIENT IF THEY CONSENT TO ELECTRONIC RECORD SHARING**  
Electronic record sharing discussed  Tick this box to indicate you have had a discussion with the patient about the sharing of medical records, including all of the points above

**C. RECORD THE PATIENT'S DECISION USING THE APPROPRIATE BOX BELOW**

Consent given for electronic record sharing  Only type in this box if consent has been granted to access the shared medical record. Please type **Full medical record**

No consent for electronic record sharing  Only type in this box if consent has **NOT** been granted to access the shared medical record. Please type **Full medical record**

**D. WHERE CONSENT IS OBTAINED, USE ONE OF THE BUTTONS BELOW TO CREATE A SHARE**

**Communication Wizard** Use the **Communication Wizard** button if you are a GP wanting to make a new electronic referral to your District Nursing service. This will also share the patient's SystemOne record with that service.

**New Share** Use the **New Share** button:-  
\* If you are a GP wanting to set up an outgoing share to another service  
\* If you are another service wanting to request a share from the GP

- Once consent has been recorded, choose the speciality that you would like to make an E-Consult to. This will open a new template, before proceeding please ensure that you have reviewed any relevant clinical algorithms.

The screenshot shows the BAIPCT Electronic Advice Services interface. At the top, there is a blue header with the text "BAIPCT Electronic Advice Services". Below this, there are two main panels. The left panel is titled "EAS front sheet: E-Consults" and contains a red warning message: "Before continuing seek and record consent for the patient's record to be shared to the specialist unit:". Below this message is a button labeled "BAIPCT Shared Care Consent". The right panel is titled "BAIPCT Shared Care Consent" and displays a patient consent decision: "Patient Consent Decision", "Electronic record sharing discussed: Yes", "Consent given for electronic record sharing: Full medical record". Below the consent panel, there is a button labeled "BAIPCT CKD E-Consult" with a tooltip that says "Enter values into the BAIPCT CKD E-Consult template".

Below the main interface, there is a separate window titled "BAIPCT CKD E-Consult". This window has a blue header with the text "BAIPCT CKD E-Consult" and a sub-header "CKD". The main content area is titled "CKD Electronic Advice Service" and contains the following text: "Before using this service, please ensure that you have reviewed the decision making algorithm for CKD management published by PACE". Below this text are two links: "PACE CKD Guidelines 2009" and "NICE CKD Guidelines 2008". It also states: "It may also be helpful to remind yourself of relevant guidelines from NICE". Below this is a red warning message: "Describe the clinical problem you are seeking advice about in the box below:". This is followed by a large text input box labeled "Expert advice request". Below the input box is a red warning message: "This box must be ticked to enable clinical reporting: \*Nephrology" with an unchecked checkbox. Below this is another red warning message: "Do NOT use this service for acutely ill or urgent cases. The target time for replying to your request for advice is 7 days." and "The e-consult request is NOT complete until you have opened the share by pressing the button below:". At the bottom right of the window is a button labeled "Share to BHT Renal Unit".

- Next, make a coherent entry in the "Expert Advice Request" box which describes the clinical problem which you are seeking advice about.

The screenshot shows the BAIPCT CKD E-Consult interface. At the top, there is a blue header with the text "BAIPCT CKD E-Consult" and a sub-header "CKD". The main content area is titled "CKD Electronic Advice Service" and contains the following text: "Before using this service, please ensure that you have reviewed the decision making algorithm for CKD management published by PACE". Below this text are two links: "PACE CKD Guidelines 2009" and "NICE CKD Guidelines 2008". It also states: "It may also be helpful to remind yourself of relevant guidelines from NICE". Below this is a red warning message: "Describe the clinical problem you are seeking advice about in the box below:". This is followed by a large text input box labeled "Expert advice request", which is highlighted with a red border. Below the input box is a red warning message: "This box must be ticked to enable clinical reporting: \*Nephrology" with an unchecked checkbox. Below this is another red warning message: "Do NOT use this service for acutely ill or urgent cases. The target time for replying to your request for advice is 7 days." and "The e-consult request is NOT complete until you have opened the share by pressing the button below:". At the bottom right of the window is a button labeled "Share to BHT Renal Unit".

8. Next, for clinical reporting purposes, tick the box for which speciality you are requesting an E-Consult from.

CKD

### CKD Electronic Advice Service

Before using this service, please ensure that you have reviewed the decision making algorithm for CKD management published by PACE

[PACE CKD Guidelines 2009](#)

It may also be helpful to remind yourself of relevant guidelines from NICE

[NICE CKD Guidelines 2008](#)

*Describe the clinical problem you are seeking advice about in the box below.*

Expert advice request

Please can you review this ladies medical record and comment on her recent renal function test results, is an outpatient appointment required?

This box must be ticked to enable clinical reporting: \*Nephrology

9. Next select the quick action button which will create a share to the relevant specialist. Do not change the default share settings, click **Save**.

The e-consult request is NOT complete until you have opened the share by pressing the button below:

#### New Share

Share to

Only lowest privacy data is viewable

Can see low privacy data

Can see medium privacy level data

Only completely private data is hidden

End date

Allow data to be amended

10. A new task window will open; leave the task unassigned if you don't know who should receive it. Type a brief message informing the team that you are requesting electronic advice and details can be found in the new journal. Click **Send**.

#### Task

You have to send a task to a user or user group informing them that this patient record has been shared to their organisation. Cancelling this dialog will cancel the shared care.

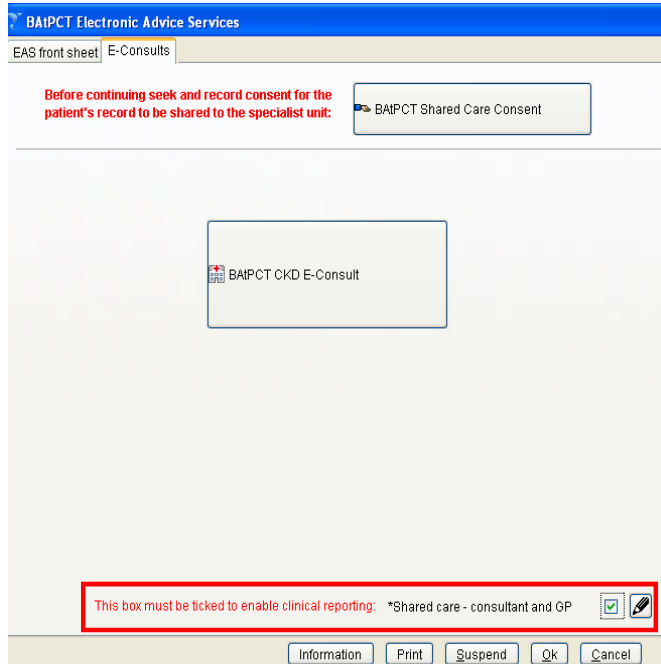
Unassigned

User group

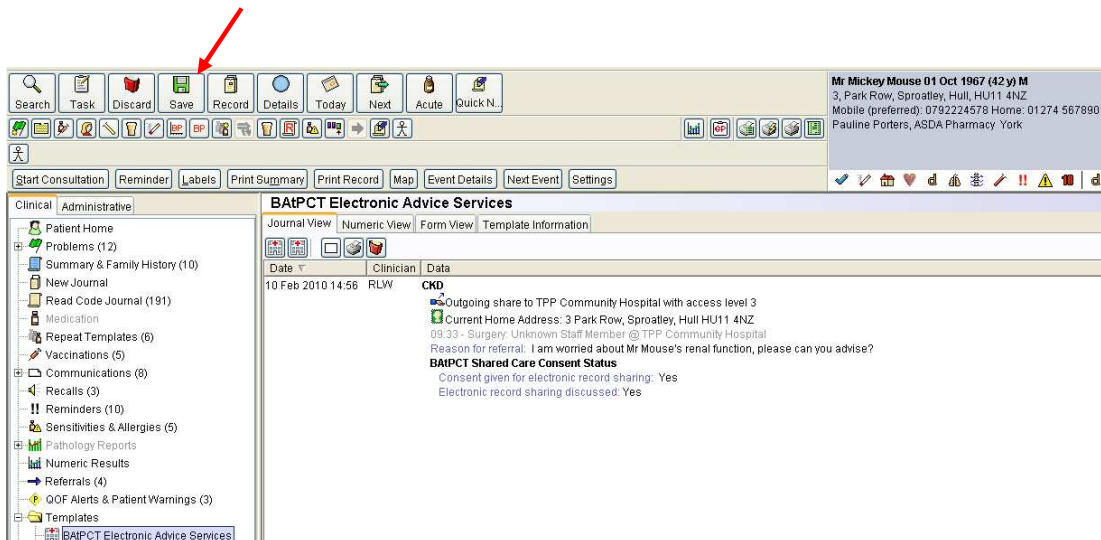
Staff member

Arial 12

11. Once the template is complete and the task sent, click **Ok** to close the template and be returned to the **BAtPCT Electronic Advice Services** template.
12. Next, tick the box for Shared care – Consultant and GP for clinical reporting purposes. Click Ok to close the template.



13. To complete the process you must ensure you **Save** the patient's record. Details of your request can be found in the New Journal and in the template view.



## Receiving an E-Consult Response:

The specialist will deal with your E-Consult request within 7 days of receipt. You will receive a task which will alert you to the completion of the e-consult opinion; an entry will be made in the New Journal which details their advice. If no further action is required the patient's care will be ended at the unit which you have opened a share to after 6 months.

*Should you require clarification about the response from the Consultant or need further dialogue then please use the task functionality. If you have any problems tasking the consultant or service concerned please contact your Data Quality Specialist.*

\*\*\*The task will be returned to your unit **unassigned** with a task type of **Electronic Advice Service Consultant Response**. It is your responsibility to ensure that the task is assigned to the relevant person or group in the practice. This can be done using a rule.\*\*\*

You will NOT receive a paper letter. If your patient needs further investigations or referrals you will still need to arrange these.

---

If you wish to provide feedback about the value of this template and service, problems encountered when using this service, suggestions about how the service could be improved or developed further, please use the link on the guidance page of the **BAtPCT Electronic Advice Services** template.

