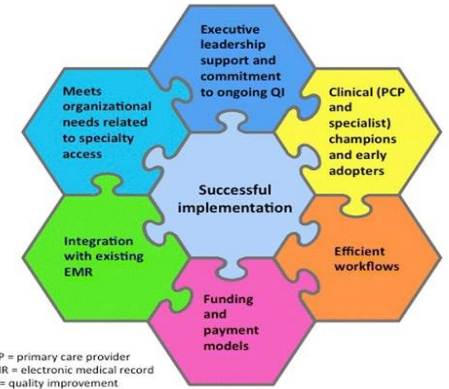


Planning, Implementing and Expanding E-consult: Guide for Integrated Delivery Health Systems

Directions: The table below contains a list of key areas (i.e. organizational needs, executive leadership support, clinical champions, etc.) to be considered to better assess your health system's preparedness to plan, implement and expand eConsult. Each checklist item is accompanied by a set of exploratory questions/consideration for dialogue. The eConsult guide is designed to be completed as a group and should engender discussion that will help you to better understand your current state, eConsult goals, and plans in which to achieve these goals.



Pre-Implementation

Implementation Puzzle Piece	Checklist Item	Considerations for dialogue
Organizational needs	The leadership and providers planning eConsult implementation clearly understand the current referral systems and processes	<ul style="list-style-type: none"> ✓ For patients needing specialty care, what is the current referral process within your health care organization? ✓ How are referrals initiated? via phone? Fax? Email? Warm handoffs? Electronically? Do they differ by referring site (ambulatory clinics vs. urgent care vs. emergency department)? ✓ How are referrals received and reviewed? Are their established guidelines for the review of referral requests? ✓ How are referrals authorized, prioritized and then, scheduled? Does this process include both the specialty care delivery system and the health plan? ✓ What is the average length of time between referral initiation and specialty care visit? ✓ What are the responsibilities of the referring provider and the specialist during the referral process? ✓ What other operational roles (e.g., case managers, schedulers, etc.) are involved in the referral, review and scheduling process? ✓ What are the pain points in the current referral process?
Organizational needs	eConsult is aligned with organizational goals	<ul style="list-style-type: none"> ✓ What are your organization's institutional goals related to specialty care delivery? ✓ eConsult is a delivery system innovation that allows primary care providers and specialists to engage in secure dialogue, share information about a patient's health conditions, and work together to determine the optimal care plan. Given this definition, how does eConsult align with your organizational goals?
Organizational needs	Problems or challenges that eConsult system will address are clearly identified	<ul style="list-style-type: none"> ✓ What challenges are you experiencing with the current referral process? ✓ What is the goal of eConsult implementation? Improve patient experience? Reduces times for Specialist visits? Improving communication between primary care and specialist providers? Decrease inappropriate referrals? Increase capacity of primary care? Increase ability for patient to remain at Patient Centered Medical Home?
Organizational needs	Measurement and evaluation plan developed	<ul style="list-style-type: none"> ✓ What specific metrics will be used to evaluate the impact of eConsult? <ul style="list-style-type: none"> ○ Volume? Wait times? Disposition? Provider Satisfaction? Patient satisfaction?

Implementation Puzzle Piece	Checklist Item	Considerations for dialogue
		<ul style="list-style-type: none"> ✓ At what time points/intervals will metrics be assessed? ✓ How will these metrics be captured (electronic medical record, eConsult program, manual)? ✓ Who is accountable for collecting and reporting evaluation data?
Executive leadership	Executive leadership are supportive and engaged	<ul style="list-style-type: none"> ✓ Which executive leaders in your organization are supportive and have authority, experience, influence and the resources needed to empower eConsult implementation?
Clinical champions	Core eConsult team/ staff	<ul style="list-style-type: none"> ✓ Have you identified members of your core eConsult Team? Executive Champion: _____ Program Director: _____ Program Manager: _____ Physician Champions: _____
Clinical champions	Specialist & primary care clinical champions	<ul style="list-style-type: none"> ✓ Identify potential clinical champions in your health system Specialist Champion: _____ Primary Care Champion: _____
Efficient workflows	Specialist reviewers designated for each specialty involved in the eConsult system	<ul style="list-style-type: none"> ✓ For each specialty adopting eConsult, which provider(s) will be responsible for reviewing eConsult requests?
Efficient workflows	Primary care clinic onboarding plan	<ul style="list-style-type: none"> ✓ Which providers or clinic locations will participate in the eConsult effort? ✓ How will the eConsults be integrated into the operational flow of the clinic? <ul style="list-style-type: none"> ○ Are licenses or logins required? ○ Who has authorization to enter new information? ○ How will questions for the specialist be addressed? ○ What are the expected timelines for the follow-up and review of the responses?
Efficient workflows	eConsult training plans developed	<ul style="list-style-type: none"> ✓ How will users be trained to navigate the eConsult system? ✓ Will in-person, on-site training be provided to all users? ✓ Will training tools; manuals, videos, handbooks be created?
Funding	Funding/ financial support secured to implement the initial pilot	<ul style="list-style-type: none"> ✓ How will eConsult infrastructure development be funded? ✓ How will eConsult maintenance be funded?
Funding	Plan to compensate pilot participants	<ul style="list-style-type: none"> ✓ What is your health system's current payment model? Are providers salaried and contract employees? ✓ Will referring providers be reimbursed per referral? ✓ Will initiating the eConsult be incorporated into the primary care appointment?

Implementation Puzzle Piece	Checklist Item	Considerations for dialogue
		<ul style="list-style-type: none"> ✓ Will providers have protected time to review eConsults?
Technology	Technology vendor or internal platform identified	<ul style="list-style-type: none"> ✓ What are the existing technologies used within your primary care and specialty care systems? Will the eConsult system integrate with your current technologies? ✓ Who will have access to the eConsult system? All providers? Specific specialties/ providers?
Technology	Technical support team identified	<ul style="list-style-type: none"> ✓ Who will be responsible for maintaining, troubleshooting and providing technical support of the eConsult system?

Pre - Expansion

Implementation Puzzle Piece	Checklist Item	Considerations for dialogue
Organizational needs	Success demonstrated in pilot phase	<ul style="list-style-type: none"> ✓ Considering the organizational goals and the problems that eConsult was designed to address, has eConsult been successful in helping to achieve those goals? <p>Ex: Sample marker of success- Goal: Onboard 4 new specialty services onto the eConsult platform. Result: Endocrinology, Urology, Cardiology, and Hematology clinic are fully on boarded onto the eConsult platform and are now accepting eConsult referrals from X primary care clinics.</p>
Organizational needs	Reassess measurement and evaluation plan from pilot to track impact of the program, including the IT infrastructure for capture of metrics	<ul style="list-style-type: none"> ✓ What specific metrics will be used to evaluate the impact of eConsult? <ul style="list-style-type: none"> ○ Volume? Wait times? Disposition? Provider Satisfaction? Patient satisfaction? ✓ What time points/intervals will metrics be assessed? ✓ How will these metrics be captured (electronic medical record, eConsult program, manual)? ✓ Who is accountable for collecting and reporting evaluation data?
Organizational needs	Reports on pilot evaluation results disseminated	<ul style="list-style-type: none"> ✓ How will results from eConsult pilot be shared? ✓ Summary Report? ✓ Newsletter?
Executive leadership	Executive buy-in	<ul style="list-style-type: none"> ✓ How have executive leaders demonstrated engagement and support of the eConsult program? (i.e., defined role/responsibilities, offered flex time/administrative time for core implementation team, investment in funding, etc.)
Clinical champions	Ongoing clinical champions (Specialist & Primary Care) confirmed	<ul style="list-style-type: none"> ✓ Identify clinical champions in your health system that will assist with expansion/ scaling up of eConsult Specialist champion: _____ Primary care champion: _____
Efficient workflows	Roll-out plan developed (Voluntary? Staged? System wide?)	<ul style="list-style-type: none"> ✓ How will providers be incentivized to participate in the system? ✓ Will eConsult be mandated across entire health system? ✓ If a staged system, how will roll-out be determined and/or specialties prioritized?
Funding	Funding identified to support and maintain core eConsult team	<ul style="list-style-type: none"> ✓ Has funding been secured to support an eConsult Team?
Funding	Compensation plan (\$\$\$ or protected time)	<ul style="list-style-type: none"> ✓ Will providers be compensated for the time spent using eConsult?