Ontario Health eForms - Clinician User Guide

The Ontario Health eForms platform was created under the Patients Before Paperwork (Pb4P) initiative to reduce administrative burden on clinicians, streamline processes, eliminate redundancy, enhance efficiency and provide faster service to patients. By digitizing administrative forms, the platform enables clinicians to submit them electronically directly to the recipients. The provincial release will offer several forms on the platform, with more to be added as it develops.

This guide provides an overview of how clinicians can submit digital forms and related documents.

Accessing Ontario Health eForms

A ONE® ID account is required to access the Ontario Health eForms platform. Authorized form senders, such as clinicians, administrative assistants or any individual approved by the clinician, can launch the platform in three ways:

- Directly from the patient record in their Electronic Medical Record (EMR)
- Through the ONE Health portal
- By selecting the eForms link provided in an email notification

Note: The eForms dashboard view is always specific to the selected patient at launch.

Accept Terms of Use

Figure 1: eForms Terms of Use.

To access Ontario Health eForms, the user must accept the Terms of Use. Once accepted, the user is taken to the eForms Dashboard associated with the patient (see Figure 2).

Dashboard

Figure 2: eForms Dashboard listing all forms for the patient.

The Dashboard page displays all forms submitted for the patient through eForms, including saved drafts, provided they were submitted or saved under the same health information custodian's authority. For details about each form's status, see the Form Status section.

Clinicians can filter and search forms by date, status, or by keywords such as form name or recipient, as well as review or update prior submissions in response to requests for information.

Navigation options for browsing multiple pages and adjusting the number of rows displayed are available at the bottom of the dashboard.

Select and Submit New Form

Figure 3: 'Select new forms' page.

The user can initiate a new submission by selecting 'Submit New Form' and choosing a form from the provided list. Alternatively, the clinician can find a form by either typing the form name in the search bar or by selecting one of the tags (MLTC, MTO) next to the search bar to locate forms specific to a Ministry.

Complete Form Submission

Figure 4: Sample of digitized form via Ontario Health eForms platform.

When a new form opens, both the patient's and the clinician's demographic details autofill. Some fields offer predefined options for selection.

To proceed with completing the form, the clinician can:

- Enter the required clinical information.
- Update the patient's demographic information, if necessary. (**Note**: Any changes made to demographics will only apply to the current form and will not be retained for other forms)
- Attach files from their computer to the form, if applicable.
  Note:
  - Make sure that the correct documents are attached for the patient before submitting the form to avoid mismatches.
  - The maximum file size and attachment limits vary by form type and are determined in collaboration with each form owner. For example, the MTO forms currently allow up to 2.5 megabytes per submission.
  - Ontario Health recommends deleting all locally saved files after they have been uploaded.

Figure 5: Sample of pop-up window specific to the form submission.

After completing the form and selecting the 'Submit' button, a window will appear for additional details specific to the submission.

- For Health Assessment Forms (HAF), the user must select the local Ontario Health atHome office as the recipient (see example in Figure 5).
- For other forms, the user can confirm patient consent.
- The user can also update their communication email address.

Once successfully submitted, a confirmation message will appear. The user is then redirected to the Dashboard, where the submitted form will be listed with a "Submitted" status, including its title, recipient and the date/time of submission.

Respond to Request for Info (RFI)

Figure 6: Form status in RFI.

The Request for Information feature allows clinicians and recipients to communicate directly about a submitted form. When a recipient messages about a submission, the clinician gets an email with a link to access the form.

The clinician can:
- Revise and resubmit the form as needed using the '**Form'** tab.
- Respond to messages in the '**Message'** tab by selecting the 'Submit' button and entering a response in the popup box.
- View the form submission history and all status changes in the '**History'** tab.
- Revoke the form if it is no longer required.

Revoke form

Figure 7: 'Revoke' button at the top of the form.

A clinician can revoke a form that is in RFI status by selecting the 'Revoke' button. **Note**: The revoke button is only available for Health Assessment forms.

Figure 8: Prompt to confirm revoking a form.

Upon selecting 'Revoke' to confirm the action:

- The form's status updates to 'Revoked' and the form is no longer visible to the recipient.
- The clinician retains access to the revoked form, including any related messages, its history, and can download the form.

Draft Form

Figure 9: Draft 'Save' button.

Clinicians can save forms as drafts by using the 'Save' button and return later to finish or submit them. Drafts are accessible from the Dashboard and are retained for 30 days after their last update.

eForms Header

Figure 10: Header displaying Account Information, patient details, language selection and contact us icons.

The platform header displays patient details, lets users switch between English and French languages, access their account information using the user icon.

Figure 11: Header 'Contact Us' icon dropdown.

The user can also click the question mark icon to contact Ontario Health support team.

Info icon
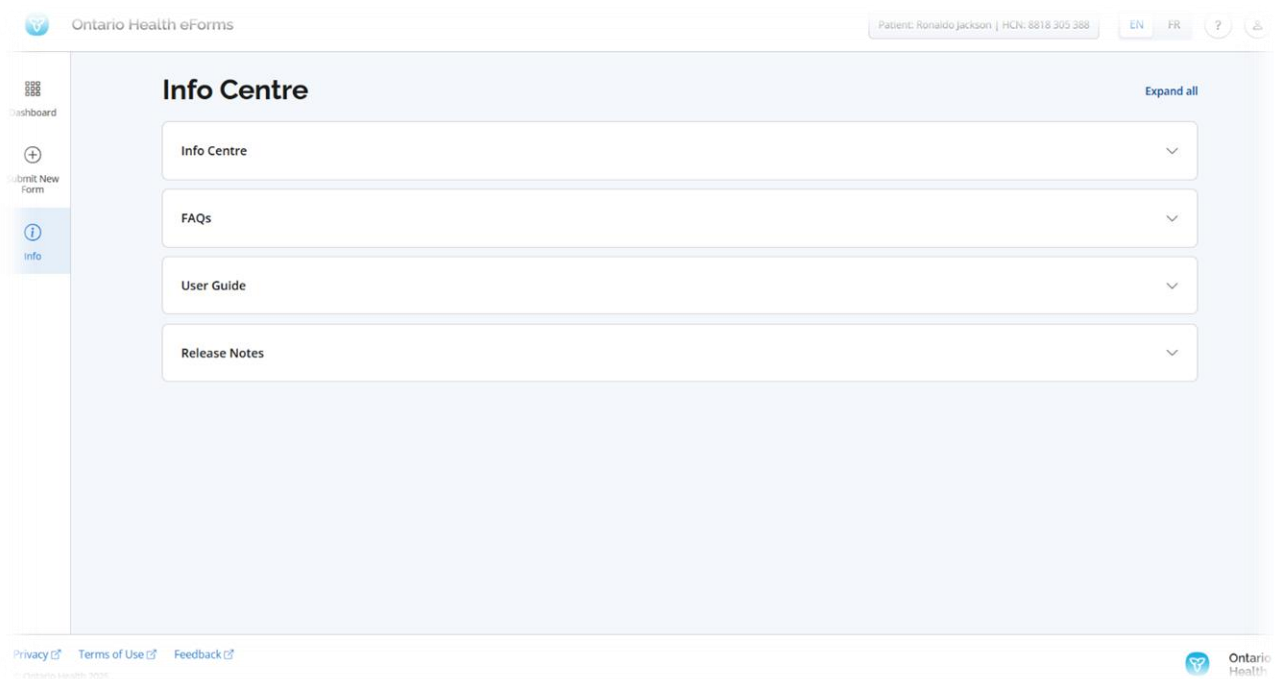
Figure 12: Info Centre page.

Select the Info icon in the left navigation bar to open the Information Center, where you can access an overview of OH eForms, FAQs, the user guide and Release Notes. Choose an item to see more details.

Form Retention Policy

Retention periods vary by form type and state. Timelines start from the most recent state change date.

Form State	HAF	MTO Forms
Completed	30 days from the last state transition	12 months from the last state transition
Revoked	30 days from the last state transition	Not applicable
Error	Not applicable	30 days from the last state transition
Submitted	12 months from the last state transition	12 months from the last state transition
Processed	12 months from the last state transition	12 months from the last state transition
RFI	12 months from the last state transition	Not applicable
Draft	30 days from the most recent update	30 days from the most recent update

Form Status

- **Submitted**: A form newly submitted to the recipient

- **Request for Info (RFI):** The recipient needs more details from a clinician. The form cannot be processed until the clinician provides the additional information.

- **Processed**: The form has been reviewed and marked as 'Processed' using the 'Processed' button. After this, the recipient can update the status to 'Completed.'

- **Revoked**: A form that is cancelled or withdrawn by the clinician and no longer available to the recipient.

- **Completed:** This indicates the recipient has finished processing the request, and the form cannot be modified, revoked, or deleted.

- **Draft:** A form started and saved by the clinician but not submitted to the recipient.

- **Deleted**: The form has been removed from the active workflow and will not be processed further. Deletion is permitted only for forms that are in RFI or Draft status.

One Health Access User Guide

Please review the user guide for instructions on using ONE Health Access. For more information, visit the https://help.accessonehealth.ca/

Contact Information

For any questions, concerns or support, users can email the Ontario Health eForms general mailbox at OHeForms@ontariohealth.ca.

For any issues related to logging in, multifactor authentication, or accessing the OH eForms platform via ONE™ID, please call ONE™ID Support at 1-866-250-1554 or send an email to servicedesk@ehealthontario.on.ca.

ONE™ID Support

Please visit the ONE™ID Registration Community site to review the Support Documents section, where you will find the most up-to-date documentation on ONE™ID processes. You may also use the link below to access the following resources:

https://ehealthontario.on.ca/en/support/article/one-id-registration-community

- Local Registration Authority Procedures Manual
- Local Registration Authority User Guide
- Registrant Reference Guide

Appendix:

Digital Form Library

Ontario Health eForms currently offers the following digital forms for use:
1. Ministry of Long-Term Care Health Assessment Form (HAF)
2. Ministry of Transportation:
    a. Medical Condition Report (MTO Mandatory Reporting)
    b. Driver Medical Report, including:
        i. Commercial Driver Medical
        ii. Non-Commercial Driver Medical
    c. Medical Condition Specific Report, including:
        i. Cardiovascular Form
        ii. Cerebrovascular Form
        iii. Cognitive Form
        iv. Seizure Form
        v. Mental Health Assessment Form
        vi. Other Condition Form
        vii. Diabetes Form
        viii. Substance Form