

Online Appointment Booking

2022-23 Funding Guidelines

Guidelines Ver 2.0 April 2022

1. Introduction

The Ministry of Health has approved funding for Ontario Health Teams (OHT), In Development Teams and other health care organizations to enable more patients to schedule an online appointment with their primary care provider or other community care provider. This funding is intended to support transforming how care is delivered and assisting OHTs (Ontario Health Teams) and the broader health sector to build their digital health maturity.

Online Appointment Booking (OAB) solutions improve patient access and convenience by enabling patients and caregivers the ability to book an appointment. OAB solutions provide appointment confirmations and reminders, which can reduce missed appointments, improve administrative capacity, and increase office efficiency. ***Email addresses and online enquiry forms are not OAB (Online Appointment Booking) solutions, as they require human interaction to confirm appointment availability.***

All new applicants can submit up to a one-year implementation plan and funding request, as well as a detailed budget for FY2022-23. Ontario Health will enter into a Transfer Payment Agreement with successful applicants.

Applicants that **met** FY21-22 TPA deliverables and achieved success in year one are eligible for sustainment funding for license cost only for FY 2022/23.

All other health care organizations who are not yet part of an approved OHT may submit a submission that aligns with the program requirements outlined below. Ontario Health (OH) welcomes submissions from Indigenous health care organizations, including those serving First Nations, Inuit, Metis and Urban Indigenous persons and support is available for submission development.

Interested OHTs and organizations should discuss this opportunity with their OH Region who will support identifying initiatives that best meet the criteria and align with regional clinical priorities.

2. Objectives

The objectives of this funding are to:

- To improve the patient experience by enabling more Ontarians to book an online appointment with their primary care provider and other members of their health care team.
- To support innovative uses of centralized online appointment booking within an integrated care environment that supports timely access to care.
- To demonstrate how online appointment booking solutions can improve provider and office efficiency.
- Strengthening existing primary care networks within OHTs.

3. Eligible Providers

- This funding is intended to support primary care providers and other community health care providers that have not yet implemented an OAB solution, apart from providers applying for sustainment funding that were successful in 2021/22 fiscal year.

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- Approved and In-development OHTs are to submit a coordinated submission on behalf of the OHT that demonstrates alignment with the OHT model and the regional vision.
 - Primary Care provider or other community health care organizations that are not yet part of an OHT may submit a proposal through the OH Region that aligns with the provincial priorities.
 - Submissions for OAB implementations by other providers, such as front-line community care providers, must demonstrate how the service will be accessible to patients.
 - Care providers who support or work in primary care can include Primary Care Providers, Nurse Practitioners, Allied Health Professional, and Specialists who work in primary care.

4. Project Requirements

To be considered, all successful submissions **must:**

- Be led by one or more OHTs, In Development Teams or other health care provider organizations who would agree to signing a funding agreement with OH that would include performance targets and monthly reporting requirements'
- Be submitted and endorsed by the OH Region (see submission process below).
- Provide information about all organizations and clinics that will receive funding and include confirmation that they have agreed to participate.
- Be aligned/demonstrate alignment with the OAB Service Standard and at minimum meet the mandatory requirements in standard.
- Provide the number of new physicians, nurse practitioners and other health care providers who will adopt online appointment booking by March 31, 2023 (not including existing users).
- Provide a target number of new patients who will have access to online appointment booking by March 31, 2023 (not including existing patients already using OAB).
- Describe how OAB funding will be used to improve the patient's experience and timely access to care within an integrated care environment.
- Outline a plan to deploy OAB and illustrate how utilization targets will be achieved successfully.
- Confirm that participating providers have necessary infrastructure in place, including clinic websites and patient email addresses.
- Propose an approach to communicate with and engage participating providers throughout the project. Build on existing OHT Primary Care Communication Protocols.
- Be designed with input from patients with mechanisms to measure and improve the patient experience.
- Describe how the program will meet the language needs of the communities it serves. Organizations within areas that are designated or partially designated under the French Language Services Act (FLSA) should describe how services will be provided in French to the Francophone community.

5. Funding

Net New

- For **net new** providers, a range of \$1,000 - \$2,000 per new provider (e.g., physician, nurse practitioner) is available for fiscal year 2022/23 (ends March 31, 2023).
 - The amount per provider includes both **technology** (OAB Licenses) and **non-technology** costs (Project Management, Change Management, Marketing & Communications or for an OHT Practice Facilitator to support change management efforts, and any other affiliated expenses) to support the project.
 - The maximum amount available for non-technology costs per provider is \$800.

Example:

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| Technology costs (cost of net new OAB licenses) | \$18,000 | 30 licenses at \$50/provider/month for full 12 months |
| Non-technology costs (cost of implementation supports which can include PM/CM, Facilitator, Marketing & Communications) – Maximum of \$800 per provider. | \$24,000 | For 30 providers at max. amount of \$800 per provider |
| Total – Expenditures | \$42,000 | |

- Individual providers can pool funding and/or multiple OHTs can pool funding to support a full-time resource(s) like, Project Management and/or Change Management, OHT practice facilitators.

NOTE: OHTs are to consider what supports are required for implementation and can determine how to allocate the funds accordingly.

- Proposals requesting funding less than 12 months must prorate their calculations according to the total number of months remaining in the fiscal year (April 1, 2022, to March 31, 2023).

Sustainability

- Applicants who met FY 21/22 TPA (Transfer Payment Agreement) deliverables by March 31, 2022, are eligible for continued operating funding in FY2022/23 for OAB license costs only.

6. Technology Criteria

- Submissions are to request funding for an off-the-shelf online appointment booking solution that aligns with the OAB service standards. This can also include a centralized appointment booking solution.
- Recommend using an OMD certified EMR (Electronic Medical Record) as important requirements like privacy and security practices, and service levels have been vetted and be connected to other provincial EHRs (Electronic Health Records) and services.

7. Submission and Approval Process

Interested OHTs, In Development Teams and other health care organizations should contact their OH Region (contacts below) to discuss their questions, and submission process. OH, Regions are responsible for facilitating submission development and determining which should be submitted for funding approval.

Central OH-Central_DigitalVirtual@ontariohealth.ca

East OH-East_DigitalVirtual@ontariohealth.ca

North OH-North_DigitalVirtual@ontariohealth.ca

Toronto OH-Toronto_DigitalVirtual@ontariohealth.ca

West OH-West_DigitalVirtual@ontariohealth.ca

Submissions must be documented using the **approved** Online Appointment Booking Submission Template and sent to their Regional Contact (emails above). Submissions will be submitted to Ontario Health Virtual Care Secretariat for funding review and approval. The Secretariat will oversee the allocation of funding to eligible submissions according to a criteria-driven process.

Appendix: OAB Resources

Provincial Online Appointment Booking Standard

The Online Appointment Booking service standard outlines mandatory and recommended functional and non-functional requirements for digital solutions used by health care organizations and providers to support patient-initiated online appointment booking. The requirements of the standard do not attempt to define requirements for every function of online appointment booking solutions. The standard is recommended for use by Ontario Health Teams, health care providers, health care organizations, and vendors to assist with the procurement process, ensuring that the technology selected meets the minimum mandatory requirements outlined in the standard. The link to the Online Appointment Booking Standard can be found here

<https://www.ontariohealth.ca/our-work/digital-standards-in-healthcare/online-appointment-booking>

Provider Readiness Assessment

Applicants can use criteria to assess whether providers are ready to adopt Online Appointment Booking. Key provider characteristics include:

1. Already using email for patient care.
 - Rationale: Patients have commented this is the best form of communication for new clinic programs.
2. Live clinic website that can serve as an easy navigation tool for patients.
3. Supporting other electronic communications with patients.
4. Comfortable using a different technology.
5. Uses technology in office setting to assist administrative processes and build efficiency.
6. Uses good degree of functionality within EMR: may create own Custom Forms and stamps to improve documentation efficiencies.
7. Uses other digital health solutions: eConsult, eReferral, OTNhub and non-OTN products
 - Supports providing feedback through evaluation and quality improvement processes
 - Influencers to peer-adoption

Promotion & Awareness

Develop an OAB awareness campaign with your team to ensure all patients at funded participating clinics are aware of the service and how to access it. A multipronged approach is strongly recommended and advised by patients during interviews and engagements when developing a communication plan.

Best ways to promote OAB (in order by patient preference):

- Email
- Face-to-face
- Mail
- Posters
- Brochures
- Website
- Word of mouth
- Email signature
- First paragraph of all communications
- Voice mail
- QR Codes on all printed materials that link to the online booking site

Primary Care OHT Practice Facilitator

The role:

The role of the Primary Care OHT Practice Facilitator(s) are to build capacity through quality improvement, leverage best practices and data to drive improved patient health outcomes. Successful submissions requesting funding for Primary Care OHT Practice Facilitators are to demonstrate and describe in the submission how the following criteria will be achieved. The OHT Primary Care Practice Facilitator will:

- Support primary care practitioners to implement OAB directly and indirectly in their offices. Preference to be determined by the OHT and each clinical practice needs. Combination of virtual and onsite facilitation is to be offered.
- Demonstrate multiple facilitation methods to support primary care practitioners learning needs and digital maturity.
- Will provide continuous health technology support broader than OAB with an initial focus on OAB implementation.
- Should also support OHT (local) Primary Care development and focused implementation.
- Provide focused OHT primary care development and/or implementation to:
 - Support system level quality improvement across primary care providers within the OHT
 - Demonstrate local sustainability
 - Build capacity through quality improvement
 - Demonstrate health IT (Information Technology) optimization
 - Support individual practitioners' digital maturity level
- Be a resource to support project management, change management, workflow optimization and vendor relationships.

NOTE: This role is a non-physician role.

OHT Submission Guidelines

Submissions from Approved OHTs, In Development teams, and multi-OHT submissions should demonstrate that their submissions align with the OHT model. Examples of how applicants can demonstrate alignment with the OHT model include the following:

- The submission was developed by the OHT according to processes outlined in their Collective Decision-Making Arrangement(s) and submitted with the OHT as signatory (e.g., leadership council).
- The submission aligns with OHT priorities and OHT-specific performance indicators.
- The proposed program involves an active collaboration between OHT members.
- Funds will be flowed to and managed by a fundholder nominated by the OHT on behalf of all beneficiary OHT members.

The submission aligns with ministry direction to In Development teams, if applicable, (e.g., to join with other teams).