**Patient Portal (PP)**

**Proposal Template**

# Project Funding Objectives

The Ministry of Health (MOH) has approved up to $11.25M each year in dedicated funding for FY2021/22 and FY2022/23 for Ontario Health Teams (OHTs), In Development Teams and other health care organizations to implement new patient portal programs or scale existing patient portal programs across the province. This funding is intended to support the recovery of the health system by transforming how care is delivered and assisting OHTs to build their digital health maturity.

Ontario Health (OH) is inviting proposals for innovative two-year programs up to March 31, 2023, to setup and implement a patient portal that will provide patients with digital access to their health information, aligned to the approved Patient Portal (PP) Provincial Service Standards. These patient portal programs can be led by an Ontario Health region, individual or groups of OHTs, In Development Teams, and other health care organizations, to provide patient access to a portal on a regional or sub-regional basis.

Successful applicants will receive funding for FY2021/22 and be eligible to receive additional funding in FY2022/23 up to March 31, 2023.   Applicants are invited to submit a one or two-year implementation plan and funding request, as well as a detailed budget for FY2021/22. Ontario Health will enter into a Transfer Payment Agreement with successful applicants. Beginning in March 2022, OHTs and In Development Teams that have achieved their FY2021/22 deliverables, will be asked to submit a re-baselined implementation plan and budget for FY2022-23 to Ontario Health for review prior to entering a FY2022/23 Transfer Payment Agreement. OHTs will not be required to write a new project proposal to receive FY2022/23 funding.

The objectives of this funding include:

* Introduce new means for more Ontarians to access their personal health information or further augment the reach or functionality of an existing solution;
* Provide patients or delegates timely access to personal health information from two or more health sectors; and
* Increase patient engagement through improved digital patient access channels (e.g. educational materials, virtual care etc.)

# Completion Instructions

* Before completing this template, it is important to review the Patient Portal (PP) Funding Criteria, the Patient Portal (PP) Provincial Service Standards and Patient Portal (PP) Provincial Implementation Guide.
* Before completing this template, interested health service providers should work with their Ontario Health Regional Digital Health Lead to discuss whether a potential initiative meets the criteria and the needs of their OHT and community.
* Health care organizations that are members of an Approved OHT, In-development OHT or Multi- OHT proposals must complete the OHT section below.
* Ontario Health can be engaged during proposal development as a subject matter expert.
* All proposals must be approved by the appropriate Ontario Health Region prior to being submitted to the Ontario Health Digital and Virtual Care Secretariat for proposal funding review and funding approval.

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| Enter Title of Proposal Here |

## Applicant Information

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| **Ontario Health Region submitting Proposal**(check more than one for multi-region proposals): | [ ]  **Toronto Region** (Toronto Central LHIN)[ ]  **Central Region** (Central, Mississauga Halton, Central West, and North Simcoe Muskoka LHINs)[ ]  **East Region** (Champlain, Southeast, Central East LHINs)[ ]  **West Region** (Waterloo Wellington, Southwest, Erie St. Clair, Hamilton Niagara Haldimand Brant LHINs)[ ]  **North Region** (Northeast and Northwest LHINs) |
| **Ontario Health Regional Transitional Lead:** | Enter Name |
| **Submitted by:** (Name of Ontario Health Regional Digital Lead) | Enter Name |
| **Submitting OHT and/or Heath Service Provider** | Enter OHT or HSP Name |
|  | Enter Key Contact Name and email |
|  |  |
| **Transfer Payment Recipient**All proposals must have a health service provider organization sponsor that the region deems suitable to manage the project, and to which the funding can be flowed from Ontario Health according to existing financial processes. For OHT proposals, the funding recipient should be the OHT fundholder or designate. The health service provider organization identified below is agreeing to enter into an agreement with Ontario Health to manage and flow the funds to any other organizations and vendors involved in this project. Any vendor agreements will be between the health service provider organization and the vendor. |
| **Legal Name of Transfer Payment Recipient:** | Enter Legal name of Sponsoring organization to be named in the Notice of the Transfer payment Agreement |
| **Executive Contact at Sponsoring Organization to be named in the Notice of the Funding Agreement.** | Enter Name, Position |
| Enter email address |
| Enter phone |
| **Senior Financial Contact (CFO, CAO) at Sponsoring Org to respond to required requests related to the Funding Agreement.** | Enter Name, Position |
| Enter email address |
| Enter phone |

## OHT Guidelines

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| **OHT Guidelines (if not applicable, move to next question)**Submissions from one or more approved OHTs or in development teams must demonstrate that their proposals align with the OHT model. Examples of ways proposals can demonstrate alignment with the OHT model include the following. Please check all that apply. |
| [ ]  Has the proposal been 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)?[ ]  Does the proposal align with OHT priorities and OHT-specific performance indicators?[ ]  Does the proposal involve an active collaboration between OHT members? [ ]  Will the funds be flowed to and managed a fundholder nominated by the OHT on behalf of all beneficiary OHT members? [ ]  Does the proposal align with ministry direction to In Development teams, if applicable, (e.g., to join with other teams)? |
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| **Please describe how the program aligns with OHT Model, including names of OHTs involved (max. 2 paragraphs).** |
| Summarize here  |
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## Proposal Details

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| Summarize in 3-4 paragraphs the scope and objectives of your proposal including participating organizations and an estimated number of unique patients that will access the patient portal solution by March 31, 2023. Describe the consultation process with clinicians and patients to inform selection, implementation, and adoption targets. Please include a total funding request amount for fiscal year 2021/22 and an estimated budget for fiscal year 2022/23. |
| Summarize here  |
|  |
| **Describe the data content that will be available to patients in initial and planned phases. Please include the scope, partnerships (data contributors and portal sharing) and intersection with other access channels (e.g., OAB, Virtual Visits). (max 3 paragraphs).** |
| Describe here |
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| **Describe your plan to procure a new or expand an existing patient portal solution and provide a rationale for the selection. Please indicate how your solution aligns with the Mandatory and Recommended requirements in the Patient Portal (PP) Provincial Service Standards. (max 3 paragraphs).** |
| Describe here |
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| **Describe your implementation plan including your marketing and communication plans and alignment with the Additional criteria met by the proposal. Refer to Appendix B, Patient Portal (PP) Funding Criteria. (see below). (max. 3 paragraphs)**  |
| Describe here |
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| [ ]  Indicate if you will be offering French language services |
| [ ]  Indicate agreement to participate in an evaluation |
| [ ]  Acknowledge funding is available up to March 31st, 2023  |

## In-Kind Support

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| **Identify the value of in-kind support received from OHT, Health Care Organization or the regions. Clinical staffing requests must be matched with clinical in-kind contributions.** |
| **Type of Contribution (Examples Only)** | Name of the Organization/ Contributor of In-Kind Resources | Value of the Contribution during FY2021/22 up to March 31, 2022. |
| Change Management | Enter name here | Enter Total ($) |
| Project Management | Enter name here | Enter Total ($) |
| Marketing/Communications | Enter name here | Enter Total ($) |
| Other | Enter name here | Enter Total ($) |
| Other | Enter name here | Enter Total ($) |
| Other | Enter name here | Enter Total ($) |
| **Total – In-Kind Contributions** | Enter name here | **Enter Total ($)** |

## Funding Request to Ontario Health for 2021/2022

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| **Funding request to Ontario Health for 2021/22**  |
| **Cost Details up to March 31, 2022:** | **One time funding requested**  | **Comments/Assumptions** |
| **Infrastructure Costs:** |
| **Solution licensing costs** | Enter Total ($) | Comments here |
| **Project Management**  | Enter Total ($) | Comments here |
| **Marketing / Communications** | Enter Total ($) | Comments here |
| Other | Enter Total ($) | Comments here |
| Other | Enter Total ($) | Comments here |
| Other | Enter Total ($) | Comments here |
| **Operating Costs:** |
| **Staffing costs** (with assumptions) – i.e., requests must be matched with in-kind contributions. | Enter Total ($) | Comments here |
| **Administrative costs** | Enter Total ($) | Comments here |
| Other | Enter Total ($) | Comments here |
| Other | Enter Total ($) | Comments here |
| Other | Enter Total ($) | Comments here |
| **Total – Expenditures** | **Enter Total ($)** |  |
| **Comments:** | Comments here |

## Timing & Milestones/Deliverables

Successful applicants will receive funding for FY2021-22 following the signing of an agreement with Ontario Health. Identify all planned deliverables for FY2021-22. Applicants are also encouraged to provide milestones and timelines for FY2022-23.

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| **Fiscal Year 2021/22****Describe Milestones/Deliverables** | **Timeline (i.e., 2 weeks, 4 weeks)** |
| Milestone/Deliverable | Describe here  |
| Milestone/Deliverable | Describe here  |
| Milestone/Deliverable | Describe here  |
| Milestone/Deliverable | Describe here  |
| Milestone/Deliverable | Describe here  |

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| --- | --- |
| **Fiscal Year 2022/23****Describe Milestones/Deliverables** | **Timeline (i.e., 2 weeks, 4 weeks)** |
| Milestone/Deliverable | Describe here  |
| Milestone/Deliverable | Describe here  |
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| Milestone/Deliverable | Describe here  |
| Milestone/Deliverable | Describe here  |

**Appendix A – Program Requirements**

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

* Be led by an Ontario Health region or one or more OHTs, In Development Teams or health service provider organizations/team with the capacity to implement a patient portal across regional or OHT attributable populations.
* Demonstrate how the program is co-designed and governed with input from clinical, patient, family and caregivers from their local care populations including mechanisms to:
* measure and improve the patient experience;
* demonstrate patient input was collected and is imbedded in the plan; and
* ensure that patients will be engaged on an ongoing basis which may include the formation of patient advisory groups
* Be supported by an OHT funder holder or a lead health service provider organization who would agree to signing a funding agreement with Ontario Health that includes performance targets and reporting requirements.
* Be willing to participate in an evaluation.
* Be reviewed, submitted, and endorsed by the Ontario Health region and;
* Acknowledge that funding is only available for FY2021/22 and FY2022/23.
* Provide achievable implementation milestones for FY2021/22, ending March 31, 2022.
* Provide an estimated number of unique users that will access the patient portal solution in the first six months following go-live and projected future growth.
* Describe how the patient portal program will meet the language needs of the communities it serves (e.g., offer communications in different languages, integrate translation services into clinical workflows). Organizations within areas that are designated or partially designated under the [French Language Services Act (FLSA)](https://www.ontario.ca/laws/statute/90f32) should describe how services will be provided in French to the Francophone community.
* Describe how the patient portal solution will provide patients with the means to gain digital access to their personal health information. The data content of the portal will demonstrate the ability to grow over time as more health service providers and health sectors contribute data or make the data available to the patient portal.
* Describe the scope of data content that will be made available and planned expansion phases (if applicable).
* Indicate the geographical region(s) / catchment area(s) of the targeted patient population served.
* List the initially participating health service providers and a summary of their planned data contributions to the patient portal.
* List the mandatory and recommended requirements met by the proposed patient portal solution specified in the Patient Portal (PP) Provincial Services Standard (see Additional Resources below). The proposal must indicate the process that will be followed to verify (or have verified) the compliance of the patient portal solution against each of the standards specified in the Patient Portal (PP) Provincial Service Standards. The detailed results of the verification process shall be made available to Ontario Health.
* Include a proposed two-year implementation plan up to March 31, 2023, with key milestones for FY2021/22. See program implementation guidelines below;
* Include requested funding amount for FY2021/22 and an estimated cost for FY2022/23 up to March 31, 2023. Include a detailed budget for FY2021/22 up to March 31, 2022 (include in-kind and new funding request). Budgets must clearly indicate:
* Initial costs to setup, procure and prepare for implementation;
* Implementation costs;
* Operational costs;
* Provide an estimated cost per user for the solution;
* Resourcing plan for implementation, clearly indicating which resources will be provided in-kind and which will be required as part of the patient portal program;
* Other eligible expenses (e.g., project management, change management, communications & marketing). Include reasonable funding requests for project management and communications costs. Note: Ontario Health will provide a limited amount of change management support.

**Appendix B – Additional Criteria**

Successful proposals **should** aim to meet all the following criteria:

* Submit as a partnership serving multiple OHTs.  This is strongly encouraged as are proposals that indicate a willingness to add OHT partners in the future.
* Describe the consultation process that was used, and the assumptions made in developing user targets.
* Outline a plan to evaluate patient portal benefits to facilitate sustainability

***Technology and Integration***

Proposals could take one of two approaches:

1. Leverage an existing patient portal solution in operation. Existing resources and available technology solutions could be further augmented in terms of the reach or functionality where appropriate.
2. Procure appropriate technology. These proposals shall clearly indicate the process, time scales and milestones from the point of procurement preparation to final product and functionality implementation.

Note: If an existing solution is available but not leveraged, please describe the rationale for procuring a new solution.

Proposals **should**:

* Strongly contemplate leveraging provincial clinical data assets and/or represent a broad number of data sets from multiple organizations.  The aim is to minimize the patient need to reach into disparate solutions for a full picture of their health data.
* Include a current state view of technology and infrastructure with plans for future state. This includes outlining a roadmap to a more complete and feature rich future state patient portal and future strong alignment with other technology and infrastructure programs (see the comments in objectives above). This roadmap should indicate timelines for:
	+ Future integrations with other patient access channels (e.g., OAB, Virtual Visits)
	+ Future data integrations/contributors - If integration to other data sources is needed, all integrations must be reviewed and approved by Ontario Health (if funding is requested)
	+ Functionality enhancements
	+ Data releases
	+ Alignment with upcoming digital identity initiative

***Governance Model***

Proposals **should**:

* Outline the governance structure/plan that will guide selection and implementation of a patient portal solution.
* Demonstrate that clinical champions were engaged, and support and endorse the proposed patient portal program; this may include the formation of clinical advisory groups.
* Include executive sponsorship implementation and rollout.
* Provide an outline of roles, responsibilities, and accountabilities of each participating organization, if multiple organizations are involved.

***Functional Model***

Proposals **should** describe:

* Marketing and communication plans
* Means/methods of how patients will get access to the portal (e.g., plan to scale the program across the region and onboard patients)
* Functionality provided to patients. What will patients be able to do apart from viewing their personal health information?
* Ongoing user support from a technical and inquiry perspective.
* Plans to sustain and mature the portal program (e.g., expand the existing data set/sources beyond funded period)
* How patients will be provided with the means to gain digital access to other educational materials or resources.

***Implementation Model***

Applicants **should** consider leveraging existing patient portals, processes and technology solutions that have been developed by early adopters elsewhere in the province (see *Patient Portal (PP) Provincial Implementation Guide*).

Key components of a successful patient portal implementation project include, but are not limited to:

* Establishing data sharing agreements with data contributors.
* Establishing service agreements with vendors or service organizations.
* Performing privacy impact assessment (PIA) and threat risk assessment (TRA).
* Developing a comprehensive communication plan.
* Developing a patient onboarding plan / process.
* Developing a change management plan and adoption strategy for data contributors.
* Developing a stakeholder engagement plan where the mechanisms of data sharing, data inclusions and data exclusions are defined.
* Developing a program sustainment plan.
* Developing a roadmap for clinical workflow integration and change management.
* Detailing the resourcing available or required to implement.

The proposal should address how the above activities will be planned and executed.

Note: These plans do not have to be ready at application.