Implementation Checklist: Orthopedic Patient Reported Outcome Measures (PROMs)

Item	Description	Timeline
☐ **Kick off Meeting (Introduction)**	• This is the first touchpoint of implementation for new ortho sites. Attend the kickoff meeting, which covers project overview, requirements for project implementation, demonstration of data collection platform (ISAAC), timelines and next steps.	N/A
☐ **Participation Agreement**	• Contract that provides Ontario Health with permission to access, use and disclose hospital level data via ISAAC. • Your CEO and Bundled Care Lead (Site Lead) will receive this agreement through Ontario Health Regional Programs. **ACTION**: CEO sign off and return to Ontario Health.	• Soon after Kickoff Meeting.
☐ **Hardware/Software Funding Request Form**	• Enclosed in the Participation Agreement is a Hardware/Software Request Form (Schedule C), an opportunity to request funding for hardware/software purchase for PROMs collection. • Sites will be asked to complete the form and note the quantity, brand, and cost of hardware/software being requested. • **Note:** This step is optional. Sites do not need to complete the form if they do not require hardware/software funds. **ACTION:** Return completed form to Ontario Health for processing and approval. Ontario Health will initiate a hospital-specific Funding Agreement, which confirms receipt of the funding request and	• Soon after Kickoff Meeting.

Item	Description	Timeline
	confirms the eventual transfer of funds to the hospital. The hospital-specific Funding Agreement requires hospital CEO sign-back.	
☐ **PROM's License Agreement**	• A one-page document which estimates the number of patients expected to complete PROMs at your hospital, and gives sites license to use paper copies of the Oxford Hip and Knee Scales and the EQ-5D-5L. • The registration process is facilitated by CIHI. **ACTION:** Complete the one-page license registration form and return to CIHI (proms@cihi.ca).	• Soon after Kickoff Meeting.
☐ **Local Health Authority Registration**	• Identify site Local Health Registration (LRA) whose primary role is to submit registration of all users who require access to ISAAC. ○ Existing site LRAs for ISAAC oncology can be used or a new ortho-specific LRA can be appointed by submitting a LRA Registration form. **ACTION:** Submit to the ISAAC mailbox (isaac@ontariohealth.ca).	• Prior to ISAAC Training. • LRA needs to be appointed before user accounts request can be submitted.
☐ **ISAAC User Registration**	• The LRA is required to submit the completed ISAAC User Registration to register ISAAC end users and super users. • **End Users** can select "Patient Enrolment" and/or "Reports User" Roles, and **Super Users** can select the "Site Admin" role. **ACTION:** LRA to submit the completed user registration form to the ISAAC mailbox (isaac@ontariohealth.ca), including all users requiring access to ISAAC (user names, user emails, user ISAAC roles). *See "Roles and Responsibilities of ISAAC Super Users and End Users" in Appendix.*	• Prior to ISAAC Training. • On average, it takes 10 business days to process this request.

Ontario Health

Implementation Steps:

	Item	Description	Timeline
1	**Project Team**	• Create project team comprised of project lead, leadership, clinic leads, IT support, clinic staff representative, etc.	• Before Kickoff Meeting.
2	**Kickoff Meeting**	• Attend an introductory 1-hour kickoff meeting with Ontario Health to discuss project context, requirements, and timelines.	N/A

3	**Clinic Flow**	• Map out clinic(s) flow and where in this flow patients will complete PROMs:
		   o Engage clinic staff and end users in process
		   o Determine where patients will be completing PROMs at different time points
		• Determine what physical modifications to location(s) are needed (e.g., displacement of waiting room chairs, storage for tablets).
		• Determine what IT and electrical changes need to occur (e.g. stronger WIFI, plugs, etc.).
			N/A

4	**Technology**	• Work with IT team to:
		   o Discuss implementation timelines
		   o Appoint IT support designated to this project (See Appendix A)
		   o Discuss the need to set up automatic patient registration feature in ISAAC (ADT, additional testing required)
		   o Discuss ISAAC hardware requirements and internal procurement rules
		   o Discuss internal security requirements
		   o Consider network WIFI/connection
		   o Map out internal process for running new hardware
			N/A

Ontario Health

Item		Description	Timeline
5	**Procurement**	• Procure hardware in a timely manner. • Hardware should only be procured once Funding Request has been approved by Ontario Health.	• Before ISAAC training. • Must be spent and delivered by end of fiscal (March 31st).
6	**Local Registration Authority**	• Identify Local Registration Authority for your site or appoint a new one (See section above). • Submit the completed ISAAC User Registration form on behalf of the team.	• Before ISAAC users can be registered.
7	**ISAAC Users**	• Identify ISAAC users (see Appendix A) • Select appropriate user roles for End Users and Super Users. • Access to ISAAC should be requested for any staff (and/or clinicians) who may be involved with PROMs collection.	• Before ISAAC training.
8	**Hardware**	• Configure tablets and/or desktop computers to ISAAC specifications. • IT team to perform some testing with Ontario Health.	• Before ISAAC training.
9	**ISAAC Training**	• Attend ISAAC training led by Ontario Health: o Approximately 1 hour	• Before go-live.
10	**Education**	• Provide education materials and introduce relevant staff and clinicians to the PROMs project. Ontario Health provides educational materials.	• Before go-live.
GO-LIVE			

APPENDIX:

Roles and Responsibilities of End Users and Super Users:

1. **End-Users - clinic staff (i.e., admin clerks, clinicians, OT/PT, physicians, nurse, etc.)**
   - Attend ISAAC Training hosted by Ontario Health
   - Access the administrative portal
   - Manually register patients (if needed)
   - Upload bulk patient registration list on pre-set schedule
   - Usher patients to kiosks/tablets and help them complete surveys (if needed)
   - Enter and submit all PROMs completed on paper into the ISAAC administrative portal
   - Access/download single time point patient scores
   - Access/download ISAAC generated reports

   Note: On the ISAAC User Registration Form, the appropriate roles for END USERS are "Patient Enrolment" and/or "Reports User".

2. **Super Users - IT support and/or clinic staff (typically 2 Super Users per site)**
   - Attend ISAAC Training hosted by Ontario Health
   - Ensure tablets are properly configured to hospital-level IT security requirements (i.e. setting tablets into 'kiosk mode')
   - Ensure hardware can be connected to the internet
   - Troubleshooting any potential WIFI issues
   - Ensure tablets are set to most efficient battery life
   - Help clinical staff come up with plan for deploying tablets
   - Helping with the configuration of printers (if applicable)
   - Conduct end-user training for any new users after ISAAC has been launched

   Note: On the ISAAC User Registration Form, the appropriate role for SUPER USERS is "Site Admin".

Ontario Health