

Guidelines for Telemedicine Scheduling and Patient Care Co-ordination



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Introduction to Scheduling and Patient Care Coordination



The Ontario Telemedicine Network (OTN) facilitates the use of videoconferencing and other technology to connect healthcare professionals, providers and patients in ways which enable them to overcome barriers created by time and distance. The result is improved and timely cost-effective access to care, and a more efficient use of the health system's resources.

Based on a decade of experience scheduling telemedicine appointments, Ontario Telemedicine Network (OTN) is leveraging advancements in technology to better equip our members with the real-time information, convenient and collaborative tools they need to schedule patient appointments through a secure and private network that safeguards patient privacy. To reach this goal, and provide you with flexibility and control over your scheduling activity, OTN has implemented the following guidelines for direct online scheduling and coordination between healthcare providers and patient sites across Ontario through the use of our online scheduling tool Ncompass. These guidelines:

- 1** Safeguard Privacy and Security of Patient Information
- 2** Identify the roles and responsibilities of all telemedicine participants during scheduling
- 3** Ensures scheduling is kept online where appointments can be easily initiated, modified and tracked

All organizations will be expected to transition integrated scheduling in to their practice by December 31, 2017. Implementing this process results in the efficient delivery of telemedicine through a streamlined scheduling process and collaboration between providers with the following benefits:

- ✓ Protects a patient's privacy
- ✓ Provides your office greater control to independently manage your telemedicine appointments and patients
- ✓ Offers a single point of contact for the patient
- ✓ Supports continuity and sustainability of your telemedicine practice
- ✓ Increases patient satisfaction and overall appointment quality



As of August, 2014 OTN introduced a provincial standard for booking telemedicine appointments based on two recommended clinical scheduling models: **Healthcare Provider Manages Scheduling and Patient Care**, and **Patient Sites Manages Scheduling and Patient Care**.

Healthcare Provider Managed Scheduling and Patient Care

Roles and Responsibilities

In this model, the Healthcare Provider and their support staff triage, schedule and contact patients to be seen for telemedicine appointments as part of their existing patient management process. OTN wants to make scheduling a telemedicine appointment as easy as scheduling a face-to-face appointment. Notifying a patient about an upcoming telemedicine appointment should be treated no differently than notifying a patient about an upcoming procedure or in-office follow up.



Below are the roles and responsibilities of each telemedicine participant under this model:

Healthcare Provider and Office	Patient Site	Patient
<p>Appointment Scheduling:</p> <ul style="list-style-type: none"> ▶ Initiate telemedicine appointment bookings in Ncompass ▶ Provide pertinent documents (i.e. assessment forms and protocols) ▶ Send confirmations online ▶ Coordinate changes or cancellations <p>Patient Contact:</p> <ul style="list-style-type: none"> ▶ Call and notify patients of appointments, cancellations or changes ▶ Ensure patients complete all pre-work and send follow-up letters <p>Manage Protocols and Diagnostic Requirements:</p> <ul style="list-style-type: none"> ▶ Manage all essential pre-appointment diagnostic requirements (e.g. lab-results, EGGs, assessments etc...) 	<p>Prior to Appointment:</p> <ul style="list-style-type: none"> ▶ Maintain an up-to-date and accurate status of system availability within Ncompass ▶ Indicate nursing support and equipment availability online <p>Confirm Availability Online:</p> <ul style="list-style-type: none"> ▶ Promptly confirm availability of system, nursing and equipment support after receiving a request ▶ Notify the Healthcare Provider immediately of any cancellations or interruptions whether planned or not 	<p>Prior to Appointment:</p> <ul style="list-style-type: none"> ▶ Completes any required assessments or lab work p to the appointment ▶ Indicates any special req to Healthcare Provider or ▶ Call Healthcare Provider ahead for cancellation

How to Implement Model 1: A Step-by-Step Overview

Below are step-by-step instructions on how to incorporate Model 1 into your workflow. These steps should be considered best practice for scheduling a telemedicine appointment as a healthcare provider.

Step 1: Accepting a Telemedicine Request

- ▶ Upon receiving a request for an appointment - the Healthcare Provider needs to determine whether a telemedicine appointment is appropriate. This might be based on the condition, specialty and diagnostic requirements. Triageing the patient determines how quickly the patient will be seen.

Step 2: Creating a Telemedicine Appointment (online)

- ▶ Staff creates the appointment online in Ncompass - the primary tool for communication, collaboration and coordination among all participants across Ontario. The patient information, times and systems can be added as the appointment is in process of being scheduled.

Step 3: Reserving Systems (online)

- ▶ Your studio and the patient's site studio must be confirmed. This can be managed through Ncompass or alternatively through phone or email.
- ▶ Let's start with your system:
 - The Healthcare Provider's system could be a Personal Videoconferencing (PCVC) system or a video/desktop office system. If the Healthcare Provider is using a hospital studio/system, you must reserve the date and time with the Telemedicine Coordinator at that site in advance of booking.
- ▶ Now let's look at booking the Patient Site system:
 - If a preferred patient site has not been identified, your staff can use Ncompass or the Telemedicine Directory to find the closest and most clinically appropriate site. Studio space, nursing support, and medical peripherals, as required, must be requested at the time of booking.

Step 4: Contacting Patients

- ▶ Your staff will contact the patient as usual, providing details and requirements for the appointment.

Step 5: Scheduling Appointment and Notifying Participants (online)

- ▶ Staff can now schedule the appointment online, in Ncompass, and verify accuracy of all details. All participants must be notified that the appointment is confirmed by utilizing the 'Notify Participants' button.
- ▶ To make sure the appointment is completely scheduled in Ncompass:
 - Ensure both sites and systems are approved/confirmed (including resources and peripherals)
 - Ensure both sites are aware of the appointment details (including protocols and assessment forms)
- ▶ Confirm the patient for the appointment:
 - A patient letter can be generated from Ncompass to help inform the patient of the process for registering and locating the telemedicine studio at the patient site.
 - A patient letter is also useful to remind the patient of their appointment. Please note, the patient letter should be sent at least 5 days prior to the scheduled appointment.



Patient Site Managed Scheduling and Patient Care

Roles and Responsibilities

In this model, the Patient Sites maintain the patient relationship by scheduling and notifying their patients. The Patient Site also has an established relationship with the Healthcare Provider. This relationship can stem from participating in a program or from practicing in a specific catchment area. Patients look to Telemedicine Coordinators and Healthcare Providers at the Patient Site in their community for initial appointment information, lab work or any other appointment clarifications or rescheduling.



Below are the roles and responsibilities of each telemedicine participant under this model:

Healthcare Provider and Office	Patient Site	Patient
<p>Triage:</p> <ul style="list-style-type: none"> ▶ Accept telemedicine request ▶ Triage patient 	<p>Prior to Appointment:</p> <ul style="list-style-type: none"> ▶ Maintain an up-to-date and accurate status of system availability within Ncompass ▶ Indicate nursing support and equipment online 	<p>Prior to Appointment:</p> <ul style="list-style-type: none"> ▶ Completes any required assessments or lab work prior to the appointment ▶ Indicate any special requests to Healthcare Provider or delegate ▶ Call ahead for cancellation
<p>Appointment Scheduling:</p> <ul style="list-style-type: none"> ▶ Create appointment online in Ncompass ▶ Communicate protocol requirements with Patient Site ▶ This is a negotiation between sites – often this step is done by the Patient site 	<p>Appointment Scheduling:</p> <ul style="list-style-type: none"> ▶ Initiate and confirm telemedicine appointment bookings in Ncompass ▶ Notify Healthcare Provider of cancellations or changes 	
<p>Role Definitions and Collaboration:</p> <ul style="list-style-type: none"> ▶ Roles played by Patient Site and Healthcare Provider in supporting telemedicine scheduling activities are negotiated between Healthcare Providers and Patient Sites 	<p>Patient Contact:</p> <ul style="list-style-type: none"> ▶ Notify the patient of appointments, cancellations or changes ▶ Ensure patients complete all pre-work and send follow-up 	
	<p>Manage Protocols and Diagnostic requirements:</p> <ul style="list-style-type: none"> ▶ Manage all essential pre-appointment diagnostic requirements (i.e. lab results, ECGs, assessments etc...) 	

How to Implement Model 2: A Step-by-Step Overview

Below are step-by-step instructions on how to incorporate Model 2 into your workflow. These steps should be considered best practice for scheduling a telemedicine appointment as a patient site.

Step 1: Managing a Telemedicine Request

- ▶ Upon receiving a request for an appointment, the Patient Site coordinator reviews and triages the referrals based on the Healthcare Provider's criteria in their protocol. In some cases this information would be sent to the Healthcare Provider for approval before booking, which may be based on condition, specialty and diagnostic requirements.

Step 2: Creating a Telemedicine Appointment (online)

- ▶ The Healthcare Provider communicates their availability (usually a dedicated block of time) to the participating Patient Sites. This can be easily completed by creating a 'draft' clinic within the online Ncompass tool and sharing this information with the participants using the "Notify Participants" feature.
- ▶ The Patient Site Coordinator then creates the appointment online in Ncompass.
- ▶ Ncompass is the main tool for communication, collaboration and coordination among all participants across Ontario.

Step 3a: Reserving Systems (online)

- ▶ Your studio and the patient's site studio must be confirmed. This can be managed through Ncompass or alternatively through phone or email.
- ▶ Let's start with your system:
 - The Healthcare provider's system could be a Personal Computer Videoconferencing (PCVC) system or a video/desktop office system. If the Healthcare Provider is using a hospital studio/system, you must reserve the date and time with the Telemedicine Coordinator at that site in advance of booking.
- ▶ Now let's look at booking the Patient Site system:
 - If a preferred patient site has not been identified, your staff can use Ncompass or the Telemedicine Directory to find the closest and most clinically appropriate site. Studio space, nursing support, and medical peripherals, as required, must be requested at the time of booking.

Step 3b: Adding Patients, Changing Systems (online)

- ▶ Upon receiving availability from the Healthcare Provider, the Patient Site can register their accepted patients for the telemedicine appointment. Patient information, times and systems can be added and managed as the appointment is in process of being scheduled. Information for multiple patients can also be entered if many patients are being seen in a group or after one another with the same Healthcare Provider.



Step 4: Contacting Patients

- ▶ The Patient Site will contact the patient with details and requirements for the appointment.
- ▶ A patient letter can be generated from Ncompass to help inform the patient of the process for registering and locating the telemedicine studio at the patient site.
- ▶ A patient letter is also useful to remind the patient of their appointment. Please note, the patient letter should be sent at least 5 days prior to the scheduled appointment.

Step 5: Scheduling Appointment and Notifying Participants (online)

- ▶ The Patient site can now schedule the appointment online, in Ncompass, and verify accuracy of all details. All participants must be notified that the appointment is confirmed by using the 'Notify Participants' button.
- ▶ To make sure the appointment is completely scheduled in Ncompass:
 - Ensure both sites and systems are approved/confirmed (including resources and peripherals)
 - Ensure both sites are aware of the appointment details (including protocols and assessment forms)
- ▶ Confirm the patient for the appointment
 - A patient letter is also useful to remind the patient of their appointment. Please note, the patient letter should be sent at least 5 days prior to the scheduled appointment.

OTN is Here to Help!

To help you integrate these guidelines into your every-day practice, OTN has provided you with some valuable tips:

Tips for Healthcare Providers	Tips for Patient Sites
<p> Plan Ahead: Telemedicine appointments are very time sensitive. If there is a high risk of you running late, plan ahead and inform the Patient Site. If you are running a clinic, schedule some buffer time in between appointments so that you can be on time. Running late or not showing up for appointments has negative impact on all the appointment participants as well as other Healthcare Providers with appointments scheduled after yours.</p> <p> Stay Consistent: Dedicate a recurring time for you to conduct telemedicine appointments to reduce scheduling and coordination activities. For example, consider reserving your time online for telemedicine every week, to see your patients, in a clinic format. Your patients could be seen back to back or in a group, depending on your practice. This is especially useful to organize multiple follow up appointments.</p> <p> Schedule One Event for Back-to-Back Appointments: It's easier to schedule one Ncompass clinic for multiple patient appointments that will be seen within the same block of time. This is faster and more efficient than scheduling each patient separately.</p> <p> Use the Copy Feature: If the appointment is to be recurring, the support staff can use the copy feature in Ncompass to duplicate the appointments.</p> <p>Note: Healthcare Providers within large organizations that may have centralized telemedicine departments should adhere to the scheduling rules or principles for that organization.</p>	<p> Update your Ncompass Calendar: It's important that the Patient Site Coordinators ensure that their Ncompass calendars are up to date and maintained in real time using the "Marked Time" functionality allowing for more efficient communication across all sites.</p> <p> Print Appointment Confirmation: For Patient registration purposes the telemedicine appointment confirmation can be printed from Ncompass. The confirmation will automatically include patient, system and appointment information.</p> <p> Confirm Appointments with Patients: Patients in remote communities can sometimes be hard to reach. It's good practice to confirm a patient if they are seen at your site for a telemedicine appointment, or if you have more updated contact information. Remember to notify all other participants that there was a change in the appointment status.</p> <p> Confirm Systems: To reduce the number of calls or call backs that need to be placed for system, nursing support and equipment confirmations Patient Sites can communicate with the requestor directly from Ncompass by updating and 'Confirming' your system for the requested appointment and using the "Notify Participants" button. If a system cannot be confirmed (as it's not available) the Notify Participants button can be used to inform the organizer.</p> <p> Use Log Notes: Another way to communicate with participants is through the Log Notes feature. Adding detailed notes while the appointment is in progress of being scheduled reduces phone calls to your site about that appointment.</p>

OTN's Role

To ensure you can successfully adopt these models, OTN's Customer Care will provide on-going guidance and hands-on support. We will work with our members to make telemedicine as easy as a face-to-face appointment.

Our Scheduling Coordinators are here to help you. They take accountability for the following clinical appointment support activities:



Scheduling Assistance

- ▶ OTN schedules appointments that cannot be scheduled in Ncompass today (such as: Serial-Multi-Point clinics, appointments for non-members and providing audio lines).

Appointment Modifications 5 Minutes Prior:

- ▶ OTN can make the changes on behalf of the requestor less than 5 minutes before the scheduled appointment

Finding a Specialist or a Patient Site:

- ▶ If you are unable to locate a host site or a specialist for the patient through your existing network or with the assistance of the telemedicine directory, OTN can support you.

New Member Orientation:

- ▶ OTN is responsible for onboarding new Ncompass users, and providing continued training support as needed for existing users.

Consultative Support:

- ▶ OTN provides subject matter expertise on an ongoing basis to improve online clinical scheduling processes and practice

If you have any questions or would like OTN to assess your telemedicine program in relation to these guidelines, please call at **1-855-654-0888**.