Scheduling with a Patient Access Network (PAN) Site

Patient Access Network (PAN) sites are designated physical locations for any patient in Ontario to attend a video visit in their own community. This enables equitable access to care when there are patients not able to access technology or require assistance from a nurse.

OTNhub scheduling of PAN sites offer benefits such as:

- Using one centralized workflow to coordinate a video visit when you are unfamiliar with an appropriate site that can host your patient.
- Viewing the real-time availability at the patient host site.
- Requesting an appointment and view updates within the OTNhub.
- After the appointment is created, you can manage (Edit, Copy, or Cancel) the event from the OTNhub, as well as the Ncompass scheduling service.
- Requesting nursing support, appointment requirements, assessments, or peripherals.

PAN sites are especially useful when there is:

- A health condition that requires a complete nursing assessment that could be missed with a home virtual visit.
- Nursing support (vitals, medication reconciliation) or a nurse assisted physical exam is necessary during their virtual visit.
- Poor digital literacy, complicating the ability to have a virtual visit at home.
- A lack of necessary devices and connectivity to complete a virtual visit at home.
- A patient preference for nurse assistance with virtual appointment and related follow up.
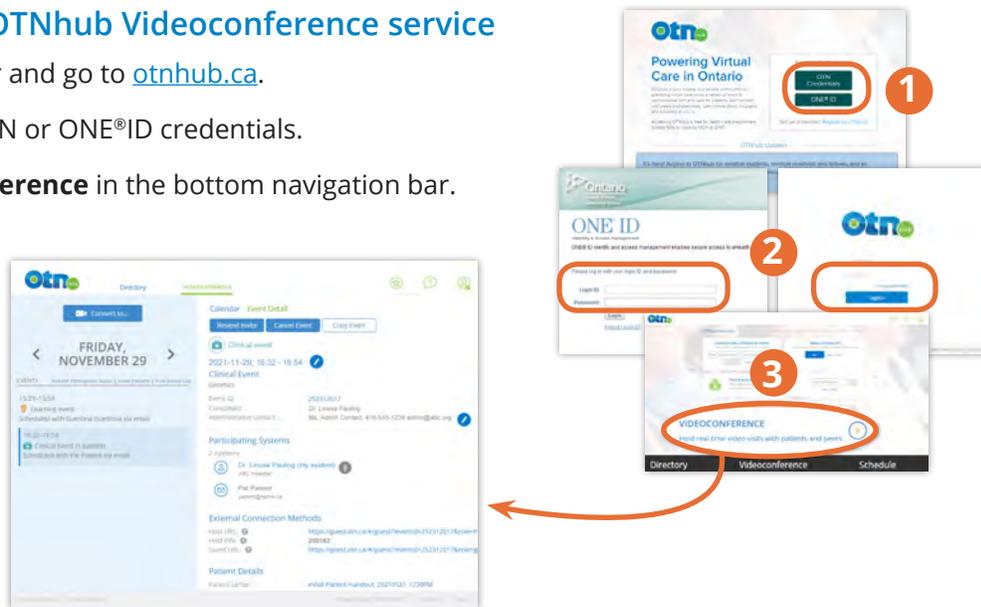- A significant distance between the patient and clinician.

> **!** **You can access the PAN scheduling workflow only if you have *clinical* access and access to at least one consultant system.**

Accessing the OTNhub Videoconference service

1. Open a browser and go to otnhub.ca.

2. **Log in** using OTN or ONE®ID credentials.

3. Click **Videoconference** in the bottom navigation bar.

For further assistance and technical support, contact Ontario Health (OTN) Technical Support
Phone: 1-855-654-0888 **Email:** techsupport@otn.ca
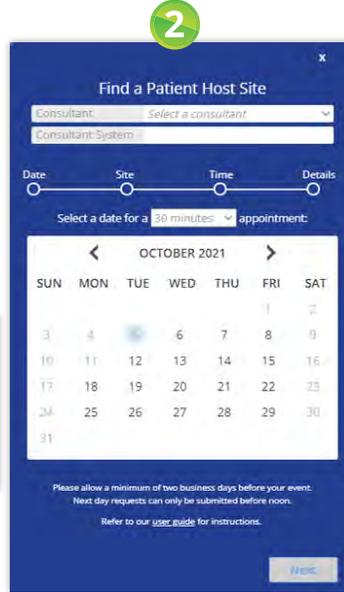
Ontario Health
OTN

Stepping through the process

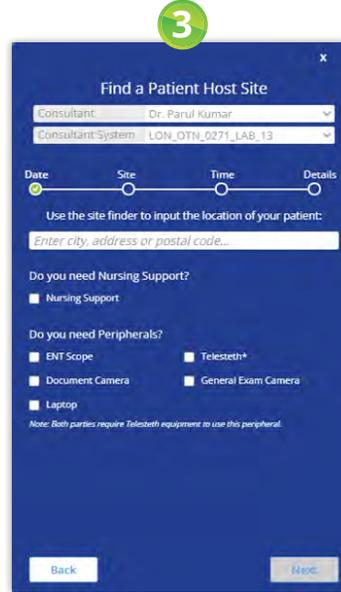To schedule an appointment, there are several panels to complete.
Follow the steps below to find a site and schedule an appointment with a consultant at a patient host site.
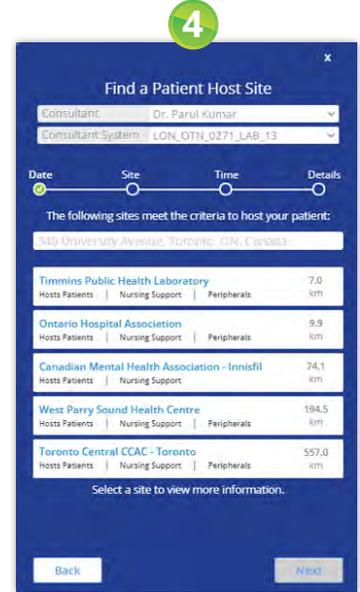
1
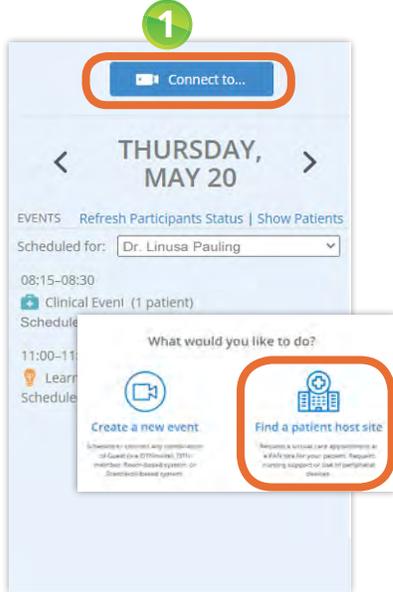
Click the **Connect to** button and then the **Find a patient host site** link.
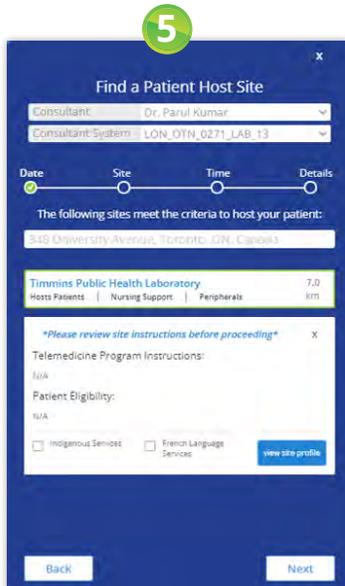
2

Identify the **Consultant** and the **Consultant system**.
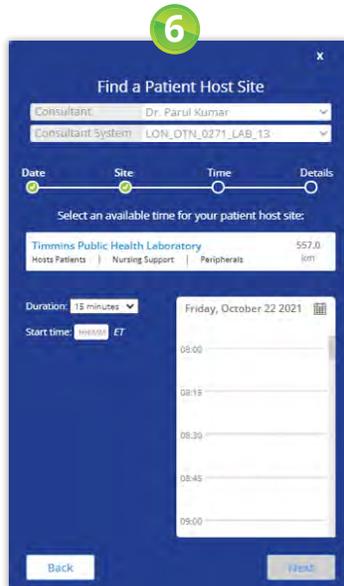Provide the **appointment duration** and select a **date**.

3

Enter the patient address, select if you need **Nursing Support** and identify any required **peripherals**.

4

To select a **Patient Host Site**, click a name in the list. Pay attention to the distance between the site and the patient.

5

Review the **site information** to ensure your patient's needs are met.
To continue, click **Next**.

6

Provide the appointment's **Start Time** by entering the time or selecting a time slot in the calendar.

7

Provide **Patient information**.

8

Review the event details and optionally select if a **Patient Assessment Needed**, provide **Appointment Requirements** and an **Event Title**. and then click **Submit**.

See Submitting and Approving Appointments.

Field Descriptions

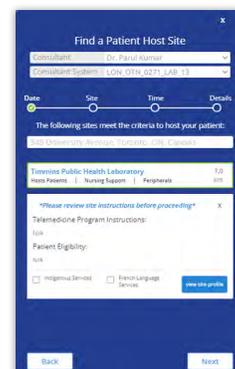| Field	Description
Consultant and Date	
Consultant	A drop-down list of consultant names. *If you schedule on behalf of one or more consultants* (*i.e.*, you are a delegate), the list includes the consultant name(s). *If you are a consultant*, the list includes all the OTNhub member systems with which you are associated. Select the desired consultant name. You can select now or select at a later step in the scheduling process - these fields are available up until you submit the schedule request.
Consultant system	A list of all associated systems that you (the logged-in user) can schedule. The list includes OTN member or room-based systems. If a system is missing, advise your OTN Primary Contact*.
Duration	The duration of the appointment. Defaults to 30 minutes (or the duration you last used when scheduling a PAN site). You can schedule an appointment lasting from 5 to 180 minutes.
Date	To select a date, click a day in the calendar. Dates that are unavailable for scheduling are greyed-out. For example, weekends, statutory holidays, and dates in the past. For next-day scheduling, you have until noon to request a time slot. After twelve noon, the following day will be unavailable for scheduling..
Nursing Support and Peripherals	
Site finder address	To search for available sites with one or more systems that host patient video visits, enter the patient's postal code, address, or city. Select an address from the drop-down list of matching sites.
Nursing support	To limit the site search to include only sites that offer nursing support, select this check box.
Peripherals	To limit the site search to include only sites with one or more systems that offer specific peripheral equipment, select this check box. For example, a general exam camera, Telesteth, ENT scope, document camera, or laptop.
Patient Host Sites	
Patient host site search results	The 5 sites closest to the patient's address with availability on the selected date appear in the search results. If sites are too far from the patient, try selecting a different date. To appear in search results, a site must: • Be open and have one or more systems available for the selected duration between 08:00 - 17:00, Monday through Friday. • Have one or more systems that can host patients. Each listed site includes the distance from the patient's address and indicates if the site offers nursing support and if there are peripherals available.

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* For instructions about how to identify your Primary Contact, see [Viewing or Editing Your Account Information](#) 🗎.

Field	Description
Site Information	
Site information and instructions	When you click on a site in the Patient Host Site search results, a panel with summary information about the site appears. **Telemedicine Program Instructions**: Can include hours of operations including lunchtime closures, fees associated with using the facility (parking, missed appointments etc.), and other relevant program instructions. **Patient Eligibility**: Describes patient exclusion criteria, conditions or limitations to the care offered (*e.g.*, unable to provide vitals for pediatric patients), barriers to accessibility, and any services the site is unable to provide. **Indigenous Services**: Indicates that the site offers culturally appropriate patient services to the Indigenous population. It lets First Nations/Metis communities know they can connect with the site for services that consider their cultural sensitivities. **French Language Services**: Indicates that the site offers a full French experience (i.e., not just a translator). To view the site's full OTNhub Directory profile in a new browser tab, click the site name or the "view site profile" button.
Appointment Time and Duration	
Duration	Pre-filled with the Duration selected in the first panel. To change, click the drop-down arrow and select a new duration.
Start time	Enter a time using the 24-hour format HH:MM (for example, 2:30 p.m. is entered as 14:30) or click a time in the calendar panel.
Daily schedule	A daily schedule of time slots available for systems at the chosen site. To select a time slot, click the desired time in the panel. When selected, the time slot appears with a green colour �. If a time slot is not available, it appears blocked with a red colour ▬. If your preferred time slot is not available, to view a calendar and select a new date click 📅 at the top of the daily schedule panel.
Patient Information	
Note: At the bottom of the panel, a countdown appears. The selected time slot is held for 15 minutes and during this time no one else can schedule the system or site. If the time slot expires, a pop-up message appears allowing you to continue or exit.	
Patient demographics	Provide the patient demographic information. Mandatory fields are not highlighted, but if something is missing, an error message appears when you try to move to the next panel.

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Field	Description
Appointment Requirements and Event Type	
Note: At the bottom of the panel, a countdown appears. The selected time slot is held for 15 minutes and during this time no one else can schedule the system or site. If the time slot expires, a pop-up message appears allowing you to continue or exit.	
Appointment details	A summary of the information you provided for this request.
Patient assessment needed	Indicates that an assessment of the patient (*e.g.*, vitals, medication list) is needed before their appointment. Provide details in the "Appointment Requirements" field. If the patient site has an "assessment form", it is usually available from the consultant's OTNhub Directory profile or you can contact the site to ask how best to send it. Note: You cannot attach a "patient assessment" form using the PAN scheduling panels in OTNhub.
Appointment requirements	Indicate assessment needs (*e.g.*, vital signs, medical review, weight, etc.) or special instructions to support the consult Do not include personal health information in this field.
Event title	Default is "Clinical Event". To customize the title, click in the field and enter your desired title. Do not include personal health information in this field.
Generate patient letter	Select this checkbox to create a patient letter as a PDF file. You can print this summary and provide it to the patient prior to their scheduled appointment (for example, via Canada Post).

Submitting and Approving Appointments

When you submit the appointment request, the following happens:

- If you checked '*Generate patient letter upon submission*', the Patient Handout will open in a new tab.
- An email with the appointment details is sent to the contact(s) listed under the patient host site's system, with a link to the event in the Ncompass scheduling tool.
- In Ncompass, the consultant system and patient confirmation are automatically approved. The event has all the same actions available as a clinical event created in Ncompass, except there is no 'Manage Attachments' button.
- The appointment appears in the OTNhub Videoconference calendar of the consultant and all those associated to a system in the event.
- The appointment status in the OTNhub Event Details is '*Pending approval by Host Site*.'

If you do not receive a response from the host site and there is no change to the status, contact the host site for appointment details.

   i. Click the host system name in the Participating Systems section to open the site's OTNhub Directory profile.

   ii. Scroll down to view the Telemedicine Contact information.

   iii. Most sites will respond within two business days.

When the patient host site approves the event:

- The event status changes to '*Accepted by Host Site*'.

## Use the Patient Handout to provide appointment details to the patient

It is critical to ensure the patient has been notified of all the appointment details.

The Patient Handout is a printable letter that contains:

- The date & time of the appointment.
- The address of the site and site instructions (e.g., where to register, parking details, etc.).
- The administrative contact, which the patient can use to contact the health care provider's office. If this field is blank or incorrect, update the Administrative Contact within the Event Details.

Sample email notification
sent to host site when event is submitted
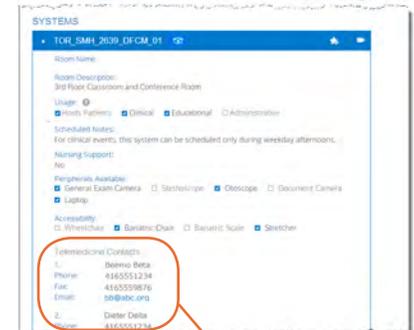
OTNhub Directory profile
Telemedicine Contact information
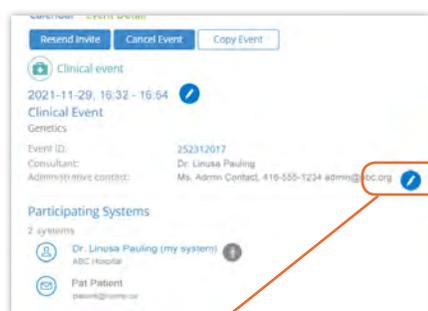
Link to update administrative contact

Editing Appointments

Notes: (1) PAN site events created using Ncompass cannot be edited in the OTNhub.
(That is, only events created using OTNhub can be edited within the OTNhub event details.)

(2) If the patient host site is already approved, it is best practice to cancel and reschedule an event if you are changing the patient host site, event date, or start time.

The consultant, their delegate, or the PAN site coordinator can edit a PAN site event created in the OTNhub up until five minutes before the event's start time.

1. To edit an appointment, click the **Edit Event** button at the top of the Event Details.

An **Edit Site Request** panel appears with the Scheduling fields.

2. Use the Back and Next buttons to access the fields you want to change.

See Stepping through the process on page 2 for a description of the panels.
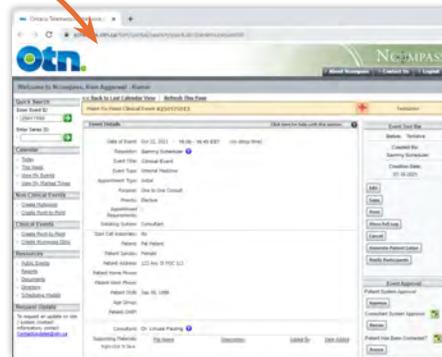When you submit an updated event:
- If you changed a fully 'scheduled' event, an email is sent to the patient host site.
- If you changed a 'pending' event, no email is sent.

Note: To view the event in the Ncompass Scheduling service, click on the **Event ID** link in the Event Details.
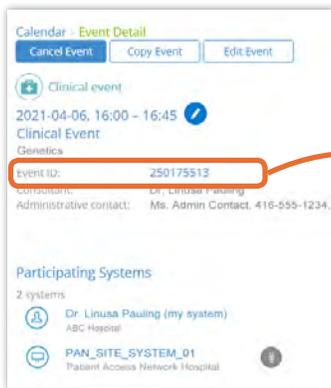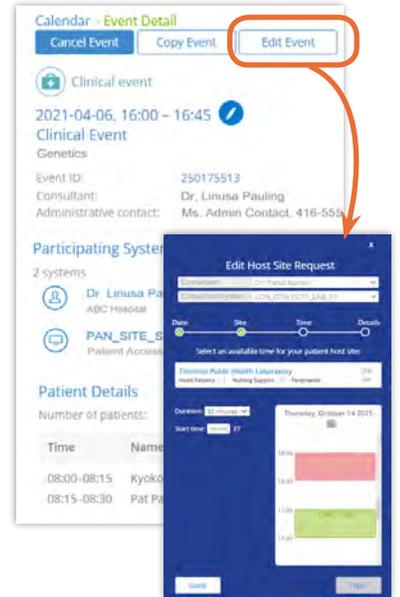
Event ID link opens Ncompass Scheduling in new tab

Copying Appointments

Note: PAN site events created using Ncompass cannot be copied in the OTNhub.

The consultant, their delegate, or the PAN site coordinator can copy a PAN site event created in the OTNhub.

1. To copy an appointment, click the **Copy Event** button at the top of the Event Details.

    A **Copy Host Site Request** panel appears with the **Calendar** options.

2. Select a new date for the copied event and click **Next**.

3. The Consultant, Consultant System, and patient location, and patient demographics have the same information as the original event. Change as needed.

4. Select the desired host site and if needed update the patient and scheduling details. See Stepping through the process on page 2 for a description of the panels.

Canceling Appointments

Note: PAN site events created using Ncompass cannot be canceled in the OTNhub.

The consultant, their delegate, or the PAN site coordinator can cancel a PAN site event created in the OTNhub.

1. To cancel an appointment, click the **Cancel Event** button at the top of the Event Details.

    A confirmation pop-up appears.

2. Click **OK** to confirm and cancel.

    The event is canceled and an email notification is sent to the patient host site.