



# DIGITAL TOOLS: ONLINE APPOINTMENT BOOKING

## How We Assist Primary Care Providers in Adopting Online Appointment Booking Technology

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### ONLINE APPOINTMENT BOOKING IMPLEMENTATION PLAN

We are pleased to introduce the Online Appointment Booking (OAB) implementation plan, brought to you by the Grey Bruce Ontario Health Team. This initiative aims to streamline appointment scheduling, improve patient access, and enhance the overall efficiency of your practice. Our comprehensive support plan will guide you through each step of the adoption process, ensuring a smooth transition and successful integration of the OAB technology into your clinic's workflow. Below, you will find an outline of how we will assist you from the initial planning stages to post go-live support.

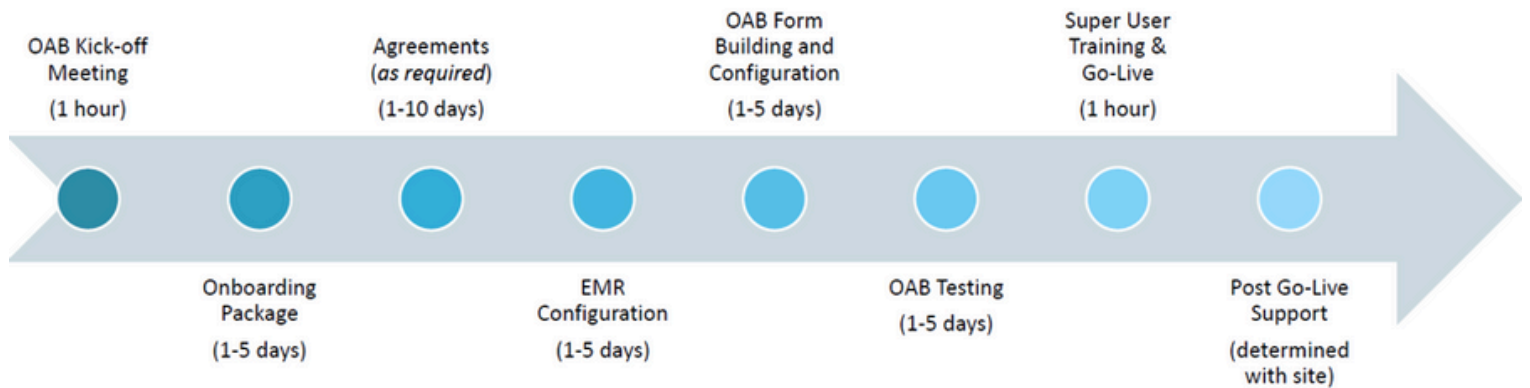


IMPLEMENTATION STEPS	DETAILS	LEAD RESPONSIBLE
<b>ENGAGEMENT AND PLANNING</b>		
<b>OAB Kick-off Meeting with Primary Care Site</b>	<ul style="list-style-type: none"> <li>• Overview of Online Appointment Booking (OAB) deployment and onboarding</li> <li>• Quick demo of OAB vendor</li> <li>• High-level overview of reporting requirements</li> <li>• Review available communications assets</li> </ul>	GBOHT Digital Health Lead
<b>Primary Care Site On-boarding Package</b>	<ul style="list-style-type: none"> <li>• Identify clinic workflows, use cases, and schedules for OAB</li> <li>• Complete OAB Preferences Checklist</li> </ul>	Primary Care Site & GBOHT Digital Health Lead
<b>Develop Communication &amp; Marketing Resources</b>	<ul style="list-style-type: none"> <li>• Create resources for patients, staff, and clinicians to increase awareness of OAB</li> <li>• Approve resources before distribution</li> </ul>	Primary Care Site & GBOHT Digital Health Lead
<b>SET-UP AND PREPARATION</b>		
<b>Agreements &amp; Other Prerequisites (as required)</b>	<ul style="list-style-type: none"> <li>• Clinics requiring agreements for OAB implementation will be provided by the OAB or EMR vendor</li> <li>• Ensure all pre-requisites are met before configuration</li> </ul>	Primary Care Site
<b>EMR Configuration (as required)</b>	<ul style="list-style-type: none"> <li>• OAB solutions requiring EMR configurations will be supported by either GBOHT Digital Health Lead or OAB vendor</li> </ul>	GBOHT Digital Health Lead or OAB Vendor
<b>OAB Configuration &amp; Testing</b>	<ul style="list-style-type: none"> <li>• Review OAB Preferences Checklist</li> <li>• Confirm settings with clinic admin support and answer questions</li> <li>• Set up OAB schedules based on use cases</li> <li>• Execute OAB testing within EMR</li> </ul>	OAB Vendor, GBOHT Digital Health Lead & Primary Care Site

**FOR MORE INFORMATION, PLEASE CONTACT: [MATTWARD@BRIGHTSHORES.CA](mailto:MATTWARD@BRIGHTSHORES.CA)**



IMPLEMENTATION STEPS	DETAILS	LEAD RESPONSIBLE
<p><b>Super User Training</b></p>	<ul style="list-style-type: none"> <li>• Schedule 1:1 training sessions for clinic admin</li> <li>• Ensure clinic admin can edit and maintain OAB licenses</li> <li>• Train clinic leads and staff if necessary (Train-the-Trainer model)</li> </ul>	<p>OAB Vendor, GBOHT Digital Health Lead &amp; Primary Care Site</p>
<b>GO-LIVE</b>		
<p><b>Distribute Communication &amp; Marketing Resources</b></p>	<ul style="list-style-type: none"> <li>• Complete and review communication and marketing resources</li> <li>• Distribute resources across relevant communication platforms</li> </ul>	<p>Primary Care Site</p>
<p><b>Go-Live</b></p>	<ul style="list-style-type: none"> <li>• Implement OAB across designated clinics</li> <li>• Ensure OAB and EMR integration is live and functioning</li> <li>• Make OAB links available for patients</li> <li>• Educate clinicians on OAB and its go-live</li> </ul>	<p>OAB Vendor, GBOHT Digital Health Lead &amp; Primary Care Site</p>
<p><b>Post Go-Live Support</b></p>	<ul style="list-style-type: none"> <li>• Ensure OAB is working as expected</li> <li>• Provide support for troubleshooting and questions</li> </ul>	<p>GBOHT Digital Health Lead &amp; Primary Care Site</p>



*\*Above shown as an illustrated timeline if the site can commit administrative support to expedite the project.*

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