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Optimizing the Role of Digital Health for Ontario's Future

Insights and Advice from
Medtech Canada Members



BACKGROUND & CONTEXT

In the winter of 2019, The Ministry of Health and Long-term Care extended an invaluable offer to Medtech Canada and its Hospital to Community Collaborative (H2C): the chance to share its thoughts on the challenges and opportunities that virtual care represents to the future of Ontario health care.

Looking to Medtech Canada and its members as key players in the medical technology industry – and as stakeholders that have direct firsthand experience in the development and adoption of innovative technologies – the Ministry was looking to not only to better understand the current landscape, but also to identify areas of future focus.

The Hospital to Community Collaborative posed the following 6 questions to its members:

1. **What do you see as the major challenges currently impeding the adoption of virtual care innovations in Ontario?**
2. **How would you prioritize or sequence the greatest opportunity for virtual care in Ontario? Where can technology have the greatest impact, in the least time, at the lowest price?**
3. **What are some of the key tools or enablers that the Ministry should explore to spread and scale virtual care?**
4. **How will you measure tangible progress toward addressing these challenges and opportunities? What would you hope to see happen in 2 years?**
5. **Beyond the Ministry itself, who do you see as the key system actors responsible for accelerating the adoption of virtual care innovations? And what role should they play?**
6. **What other questions should the Ministry be focused on answering as it prepares for a “digital first” Ontario health system?**

Medtech Canada aggregated and synthesized the multiple responses it received from individual organizations representing the wide range of Hospital to Community Collaborative members, and distilled them into a core set of three key insights.

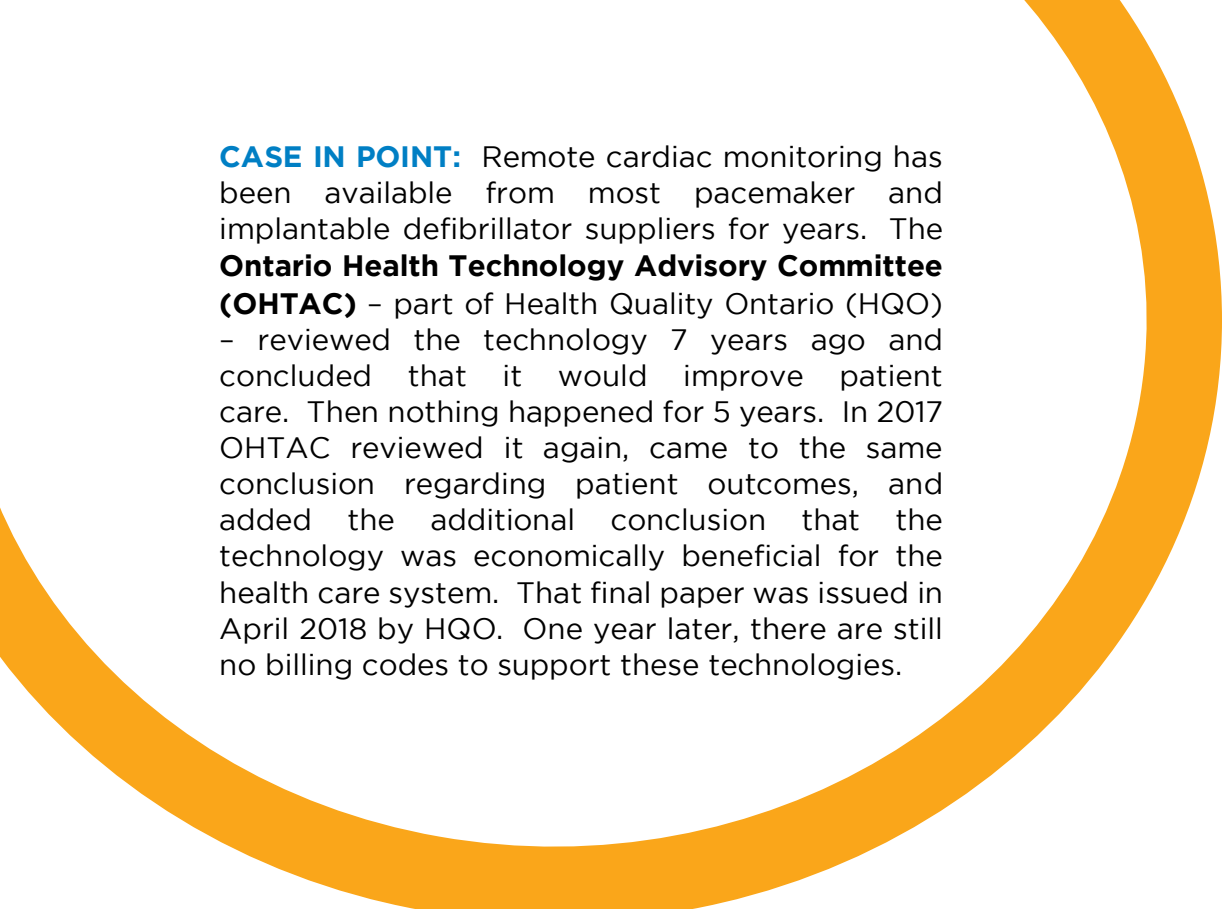
1. **Getting Strategy Right:
Driving Impact through Better
Planning and Measurement**
2. **Getting Implementation Right:
The Critical Role of Incentives
and Funding**
3. **Getting Technology Right:
The Importance of
Standardization and Integration**

THE CHALLENGES AT HAND

Before turning our attention to Ontario's massive digital health opportunity, it's important to identify the core challenges that must be identified and addressed before that opportunity can be optimized.

As Medtech Canada reviewed the key insights that emerged from its members in response to the fundamental questions posed by the Ministry, a number of distinct but interconnected obstacles came into sharper focus. Taken together, these hurdles undermine, restrict and hinder the potentially transformational role that digital health can have in delivering better service, to more Ontarians, in more places, for less money:

- A confusing and restricted set of **funding models** (especially billing codes) that prevent or discourage clinicians from exploring ways to deliver virtual care – a challenge compounded by (1) a concern that billing codes are too often used to protect specialist exclusivity instead of expanding access to more care delivered by more physicians, and (2) a widespread sense that the Ontario Telemedicine Network (OTN) has stifled the emergence of a Made-in-Ontario digital health sector;
- The lack of an organization with the mandate – and the resources – required to identify and support **regional pockets of innovation excellence** and then extend their learnings and impact province-wide;
- A fragmented and inefficient approach to **stakeholder engagement** that not only prevents the government from better understanding the challenges and issues slowing the spread of digital health technologies, but also undermines the identification and integration of innovative solutions;
- A slow and antiquated **procurement process** that makes it exceedingly difficult for vendors with proven technology solutions to sell into the public health care system – despite global evidence that a given innovation not only improves patient outcomes, but also generates significant cost savings to the system;
- Too many systems that don't talk to each other, leading to too many clinicians fighting with too many platforms accessed through too many passwords – all of which creates **interoperability and standardization** challenges;
- A restrictive and antiquated approach to the **privacy of data** that leaves too many health care providers unwilling to engage in projects or partnerships that could deliver significant value because of anxiety and misinformation about why data can be safely shared, how and with whom; and
- Insufficient, limited and inconsistent **Internet access and cellular service** in too many rural and remote communities that prevent those Ontarians who would benefit the most from virtual care from taking advantage of enormous leaps in technology.



CASE IN POINT: Remote cardiac monitoring has been available from most pacemaker and implantable defibrillator suppliers for years. The **Ontario Health Technology Advisory Committee (OHTAC)** – part of Health Quality Ontario (HQO) – reviewed the technology 7 years ago and concluded that it would improve patient care. Then nothing happened for 5 years. In 2017 OHTAC reviewed it again, came to the same conclusion regarding patient outcomes, and added the additional conclusion that the technology was economically beneficial for the health care system. That final paper was issued in April 2018 by HQO. One year later, there are still no billing codes to support these technologies.

KEY THEMES

Despite the core challenges outlined above, the Medtech Canada members engaged through this process were broadly optimistic about the opportunity facing Ontario – and collectively committed to working with the Ministry and its partners to improve patient outcomes and health system sustainability. Three important themes emerged from their insights that should help guide the Ministry as it works with a wide range of partners to optimize the opportunity of virtual care:

1. **Getting Strategy Right: Driving Impact through Better Prioritization and Planning**

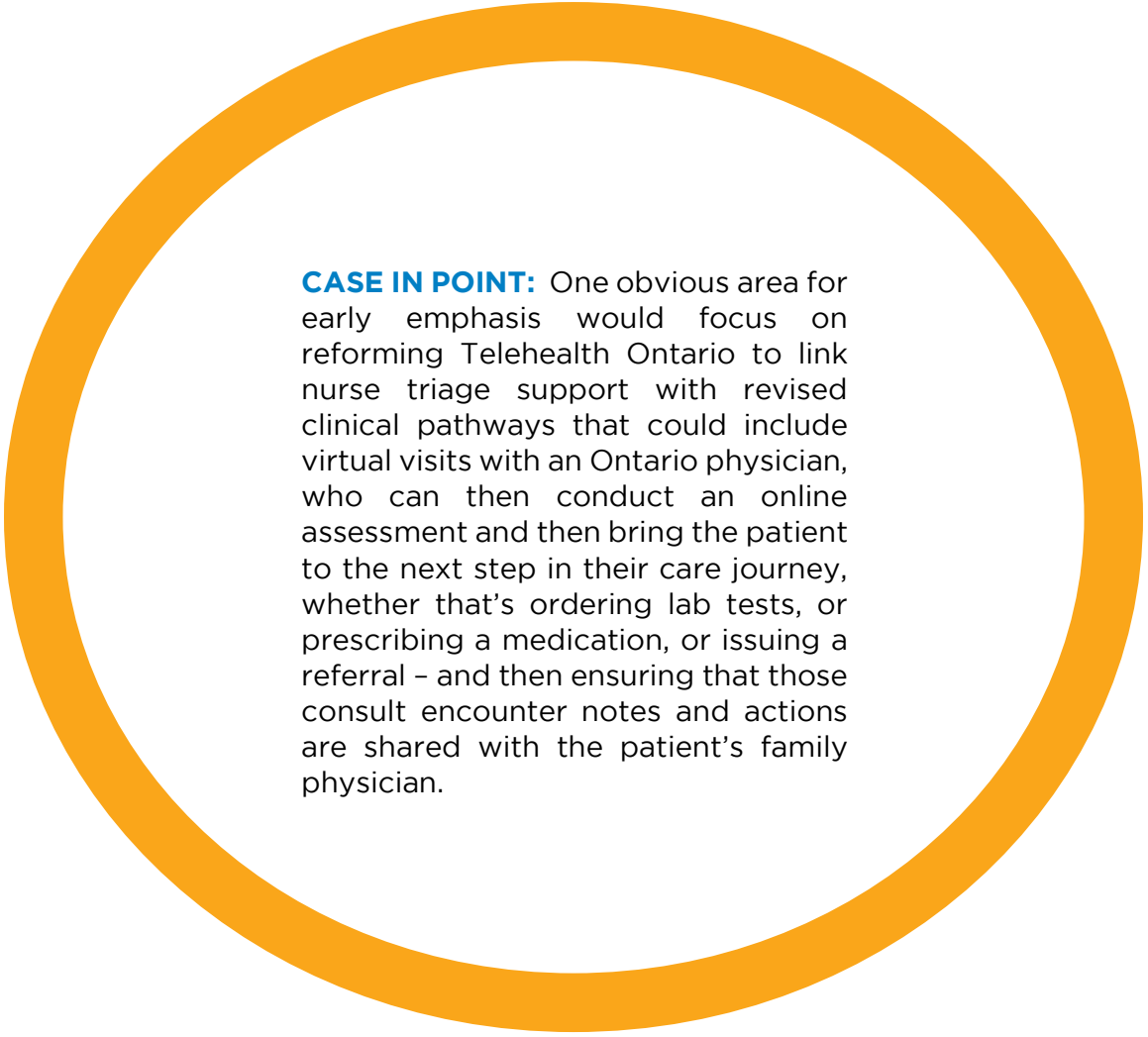
When faced with a complex challenge, knowing where to start is often half the battle. With this adage in mind, the Ministry should focus its attention on two distinct forms of prioritization:

- **Prioritizing with a System Lens** will help identify those areas where virtual care can drive the greatest efficiencies in care, like medication management, chronic disease management (especially around COPD and Diabetes), wound care, and other elements of care that can be dealt with effectively and inexpensively if they're addressed quickly.
- **Prioritizing the Patient Lens** will help identify those areas where virtual care can offer the most value to patient populations, including elements of care such as improved access to virtual visits, remote monitoring, home dialysis, secure messaging, better information sharing across the entire care team – including primary care, acute care, home care and long-term care – and the ability to make better use of patient-reported experiences and outcomes.

Of course, these two lenses should not be seen as mutually exclusive or distinct. Instead, it's where these lenses intersect that the Ministry can find its closest and best opportunities to drive positive change.

Luckily enough, there is no need to reinvent the wheel or to start from scratch: Ontario can accelerate its transition to a future digital health system by engaging Medtech Canada – and other committed collaborators – and by reviewing other OECD countries that have effectively and efficiently implemented digital health & virtual care tools to drive both economic savings and improved patient outcomes.

These engagement and research processes should help inform a comprehensive push to educate clinicians (on what tools are available, how to access them, how to use them and how to integrate them into existing care pathways) and patients (on the benefits of virtual care – not only to their care teams but also to their families and themselves).



CASE IN POINT: One obvious area for early emphasis would focus on reforming Telehealth Ontario to link nurse triage support with revised clinical pathways that could include virtual visits with an Ontario physician, who can then conduct an online assessment and then bring the patient to the next step in their care journey, whether that's ordering lab tests, or prescribing a medication, or issuing a referral – and then ensuring that those consult encounter notes and actions are shared with the patient's family physician.

2. Getting Implementation Right: The Critical Role of Incentives and Funding

If prioritization is the first essential precondition to unlocking the value of digital health in Ontario, the second step is revising and modernizing compensation and procurement.

When it comes to funding itself, a new approach to health care provider remuneration is required to encourage the adoption of digital health and virtual care. Virtually every Medtech Canada member we consulted called for not only major reforms to the OHIP billing code system, but also for mechanisms to better share funding among the various health care providers who comprise an integrated care team.

Whether through Ontario Health or the emerging array of Ontario Health Teams (OHTs), the province also needs to update its innovation procurement mechanisms, and carve out dedicated pools of funding that can be used to pay for technologies with proven value. The OHTs could also be charged with identifying opportunities to pilot promising technologies that could then be evaluated by independent experts whose findings would in turn support Ontario Health in its efforts to help “scale and spread” proven innovations.

Of course, it’s also important to remember that not all care can or should be delivered virtually. Understanding the times patients will need in-person care is every bit as important as understanding when – and why – they don’t. The ultimate goal needs to be to ensure virtual care and in-person care connect and work together seamlessly.

3. Getting Technology Right: The Importance of Standardization and Integration

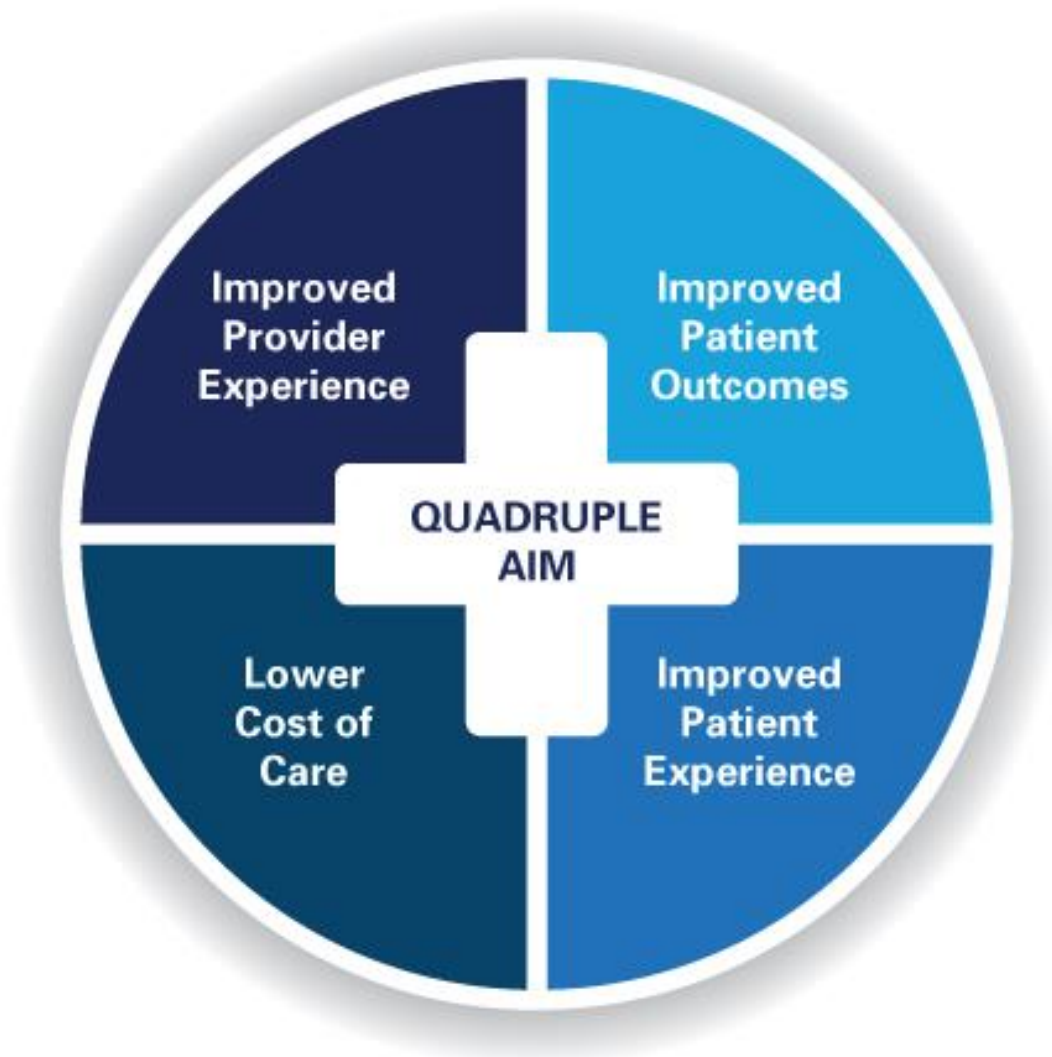
Getting the right tools in place is imperative – but making sure that all of those tools can actually talk to each other is essential.

To address the second part of this equation, Ontario needs to set criteria and requirements for virtual care tools to ensure consistent quality and connectivity to the technologies that already define and connect the broader system, from hospital-based electronic medical record (EMR) systems, to community care systems, to patient-generated health data sources.

What is needed is a set of core standards around data privacy, sharing/transferring data online and secure messaging that are universally accepted – but that are also broad and enough to foster an open, accessible and dynamic market. With an inclusive and consistent approach to integrating new innovations into existing systems, Medtech Canada members will have the predictability they need to build tools and technologies that enhance, rather than undermine, current protocols and platforms.

MEASURING PROGRESS

Medtech Canada believes strongly that the funding, delivery and measurement of health care in Canada should be guided by the **Quadruple Aim**. Building on the “Triple Aim” first developed by the Institute for Healthcare Improvement in the United States – enhancing patient experience, improving patient outcomes, and reducing costs – the Quadruple Aim also includes an explicit focus on improving the experience of clinicians:



Monitoring and measuring progress will be a pivotal step in Ontario’s push to unlock the potential of digital health, and choosing the right set of metrics is essential. The Ministry should start by committing to a core set of indicator “buckets” – and then selecting representative metrics within each one.

These “buckets” could include:

- **Uptake Indicators** which measure how prevalence of digital health technologies could include:
 - The # of clinicians who have adopted virtual tools (from virtual visits, to secure patient messaging, to remote monitoring)
 - The # of patients receiving virtual care
 - The % of targeted procedures being delivered virtually vs. in-person
 - The # of different services or consultations being delivered virtually
 - The amount of time patients have to wait before being “seen” (since greater access to virtual visits should reduce overall wait times)
 - Reduction of ER admissions due to virtual care, or to walk-in clinics
 - The # of discharge protocols rewritten to include virtual care components

- **Patient-focused Indicators** that measure how individual Ontarians are experiencing these technologies, including a wide range of patient satisfaction and engagement scores:
 - The impact of digital health on the direct experience of patients and families
 - Adherence or compliance rates
 - Willingness to recommend a digital health tool to a friend or family member
 - The # of patients with access to their own personal health information
 - Patient perception of how well their health information is used – and shared – across a care team

- **Outcome Indicators** that attempt to link tangible and measurable improvements in patient care with the utilization of a digital health technology.

One important step Ontario could take is to recognize the local and regional disparities that currently exist when it comes to accessing the technology infrastructure required to optimize digital health. The province should consider devising a subset of indicators that would focus on underserved rural and remote regions, and that would help illuminate early and meaningful progress.

The Ministry should also consider establishing a core set of goals or targets it can use to determine system-wide progress – like setting clinician or provider adoption targets (for example, the # of virtual care events against targets for populations, sectors, pathways etc.) as an increase of X% per year; or patient access and experience targets (for example, improvement in the targets of access to treatment within 24 hours as an X% improvement per year of implementation).

KEY RECOMMENDATIONS & NEXT STEPS

As Medtech Canada synthesized and refined the insights and ideas of our members, we settled on the 4 specific recommendations we believe will best support the Ministry's commitment to unlock the power and potential of digital health:

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1. **Leverage Ongoing Health Reforms** to Embed Digital Health Innovations Across Ontario.
 2. **Broaden the Tent** to Engage a Wide Range of Partners, Collaborators, Experts and Innovators
 3. **Harness Standards** to Bypass Legislative and Regulatory Roadblocks
 4. **Extend Ontario's "Open for Business"** Commitment to Digital Health

1. Leverage New Compensation Models and Ongoing Health Reforms – including the Premier's Council to End Hallway Medicine and emerging Ontario Health Teams – to Embed Digital Health Innovations across Ontario

It is clear from our consultations that designing and implementing a new set of billing codes will be a pivotal step to expanding physician use of virtual care in fee-for-service environments. Salaried models of care like Family Health Teams may be ideal candidates for early adoption or expanded use of virtual care technologies, while the bundled funding connected to Quality-Based Procedures (QBP) is another area ripe for increased use of digital health tools.

Despite the potential that these tools represent, too many corners of Ontario have yet to embrace the opportunities that virtual care represent. To close these gaps, Ontario needs a provincially-coordinated, transparent, systematic process for market access, engagement adoption and procurement – and Ontario Health, the Ontario Health Teams, and the Premier's Council to End Hallway Medicine all have key roles to play.

Medtech Canada urges the Ministry and the Premier’s Council to End Hallway Medicine to ensure that Ontario Health embeds the principles of value-based health care into its new procurement function, in order to more closely tie health expenditures to patient outcomes.

We also applaud the Ministry’s determination to take a “digital first” lens to the development and approval of the Ontario Health teams. As Appendix B of the OHT Full Application Form eloquently notes, “Experience from other jurisdictions suggests that digital health is a powerful tool for advancing integrated care, shared accountability, value-based health care and population health management approaches.” Ensuring that the first wave of OHTs use digital health tools and technologies to support their delivery of integrated care will catalyze the expansion of virtual care across the province.

2. Broaden the Tent to Engage a Wide Range of Partners, Collaborators, Experts and Innovators

Ontario is fortunate to be home to dozens of organizations, associations and companies with the kind of invaluable experience and skills required to support the Ministry’s push to optimize the role of digital health. Some of the actors and allies we see as especially important include:

- **Clinicians** – and their allied health care partners in nursing, pharmacy and related professions – who understand the best mix of efficiencies and incentives required to drive uptake of innovations;
- **The Ontario Medical Association**, which works with the Ministry through the Physician Services Committee to identify and approve new fee codes;
- **Hospital administrators and IT leaders** who can guide the integration of new tools and technologies into existing systems;
- **Ontario Hospital Association** that can integrate disparate perspectives from hospitals across the province;
- **Regional Innovation Centres and Accelerators** to curate and support Ontario start-up companies and help them sell into their home province; and
- **Vendors** themselves, many of whom have successfully sold transformative digital health technologies south of the border and around the world, and who want nothing more than to bring that same value to their home provinces.

Medtech Canada can play a uniquely helpful role in convening all of these key stakeholders, and would welcome the opportunity to identify how we can best support the Ministry’s future efforts going.

3. Harness Standards to Bypass Legislative or Regulatory Roadblocks

Legislation and regulations obviously have a massive role to play in supporting any kind of health system reform. When it comes to unlocking the potential of digital health, however, standards are also critically important – and can be created, revised or updated much more easily than changing laws or regulations.

Medtech Canada calls on Ontario to support the development of national standards that will give innovators and entrepreneurs that clarity and predictability they need to design, develop and sell innovations into Ontario – and across the country. By helping to accelerate the push for pan-Canadian standards, Ontario can help ensure that the country doesn't end up with a province-by-province procurement patchwork.

And since the standards development process is a consensus-based model that integrates multiple perspectives – including a public review and comment process to ensure patients, families, caregivers and other Ontarians also have an opportunity to have their voices heard. Standards are also designed to account for emerging technologies and are continually updated to ensure they remain current and remain technically accurate. The Canadian Standards Association is a nationally accredited organization that has already developed standards related to medical devices, home dialysis, home care, ICT and paramedicine – making it another important stakeholder to engage.

4. Extend Ontario's "Open for Business" Commitment to Digital Health

Over the past year, the Government of Ontario has made an explicit commitment to making Ontario "open for business" in order to support economic development across the province. Efforts have included a focus on reducing regulations and other forms of red tape. These measures are aimed across the economy, and will ideally help support companies and entrepreneurs in multiple sectors and industries.

Beyond these important steps, however, Medtech Canada calls on the Government of Ontario to explicitly prioritize the success of the province's digital health and medical technology sector.

Medtech Canada is the national association representing the medical technology industry in Canada. Our association advocates for achieving patient access to leading edge, innovative technology solutions that provide valuable outcomes. Our members are committed to providing safe and innovative medical technologies that enhance the quality of patient care, improve patient access to health care, and help enable the sustainability of our health care system. The medical technology industry in Canada employs over 35,000 Canadians in approximately 1,500 facilities across the country.

At the same time, the sector's success is important for far more than economic reasons: Ontario innovators and entrepreneurs are uniquely well positioned to develop digital health solutions to complex and challenging Ontario problems. Not only that, but selling into your home market is the best way to prove to global customers you're well positioned to succeed outside Canada.

CONCLUSION

Delivering better care in more ways to more patients at an affordable price will be impossible for any jurisdiction to pull off without harnessing recent advances in digital health and virtual care.

For so many years Ontario has lagged behind in adopting and utilizing technologies that support these goals – which is why Medtech Canada is so encouraged by the “digital first” health system reform push currently underway across the province, and by the government’s commitment to enhancing and expanding access to new innovations.

Health care systems all over the world are adopting and utilizing the digital health and virtual care technologies of Medtech Canada members. Medtech Canada focusses our advocacy efforts on working with governments across the country on positive, collaborative approaches to policy development.

Medtech Canada is committed to supporting Ontario as it moves to embrace a digital health future, and we look forward to identifying tangible collaboration opportunities that build on our excellent track record of success.

The Medtech Canada “Hospital to Community Collaborative” is a unique, multi-stakeholder coalition dedicated to ensuring that Ontario patients receive the highest quality care in their own homes and in their community. It brings together representatives from small and medium-sized enterprises, multinational companies, hospitals, regional health clusters and innovation advocates.

Our goals are fully aligned with the governments’ own goals – and we look forward to working together to make health care better in Ontario.

We would like to thank the Ministry of Health for the opportunity to provide our feedback and suggestions in response to such a pressing set of policy questions, and we look forward to a continuing to support the successful delivery of digital care and virtual health initiatives across Ontario.

