

# Updating an OTNhub Directory Site Profile

Site editors (*i.e.*, OTNhub users who can manage the site profile for a member organization in the Directory) have access for editing sites published in the Directory. For example, the primary contact for a service is often granted administrative rights.

If you are not a site editor (*i.e.*, no Edit button appears), you can [suggest an update](#).

See also, [Updating a Person's Profile](#).



It is critical to review the site profile on a bi-annual basis (every 6 months) to ensure the information is current.

It should also be reviewed anytime there are changes to staff, rooms, programs, procedures, policies, or hours of operation.

## Accessing a Site Profile

1. Sign in at [otnhub.ca](https://otnhub.ca) and go to the **Directory** service.
2. [Search for the site](#), and locate the site name in the results list.
3. To view a summary of the systems at that site, click the **Systems** drop-down arrow.

You can see which peripherals are available for each system at the site.

4. To view the site's profile details, click the site name in the search results.

The **Profile Details** screen appears with an **Edit Profile** button at the top.

5. To [manage updates submitted by other OTNhub users](#), click the "View suggested updates" link at the top of the profile screen.

6. To open the site's profile details with fields available for edit, click the **Edit Profile** button.

If an **Edit Profile** button does not appear, you do not have administrative rights.

The site's **Edit Profile Details** form appears with **Save** and **Cancel** buttons at the top.

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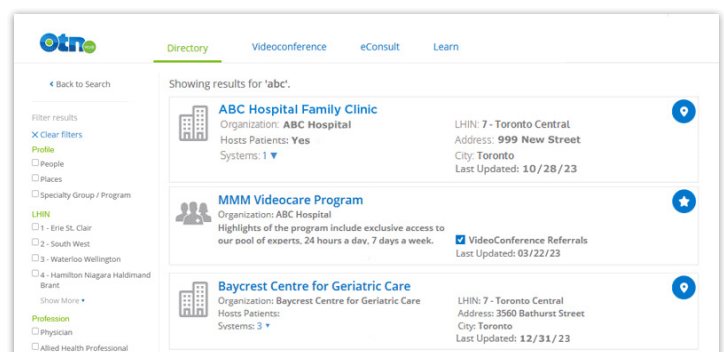


Figure 1: Directory search results

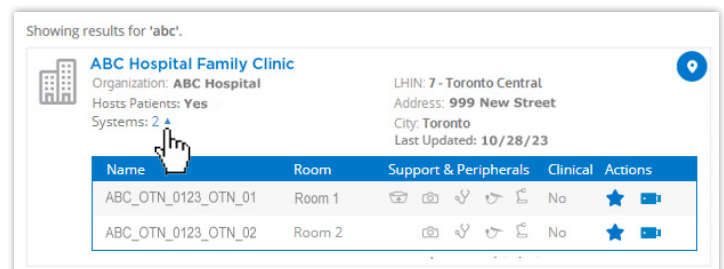


Figure 3: Site search results with systems displayed

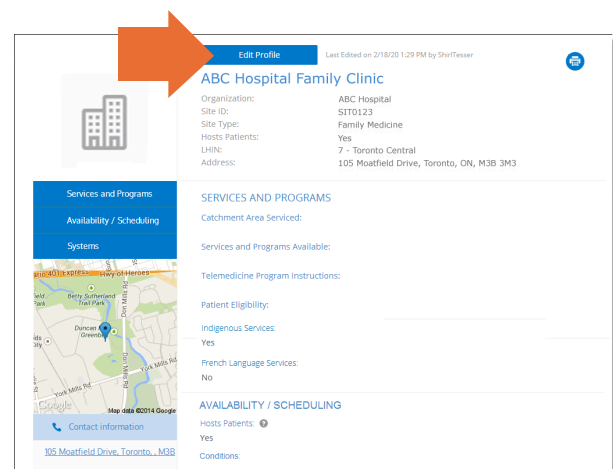


Figure 2: Site profile details

## Editing a Site Profile

A site editor can update the site profile directly or can accept or reject changes delivered by the “Suggest an Update” feature. (See [Managing Suggested Updates](#) on page 7.)



The person responsible for telemedicine programs at your organization should have *site editor* permissions

If you need administrative permissions to edit a profile, contact your organization’s Ontario Health (OTN) Primary Contact for Service (PCS), who can submit a change request to [ContactUpdates@otn.ca](mailto:ContactUpdates@otn.ca).

1. After you make your changes, click **Save**\* at the top of the form. The site information is validated and if all is okay:
  - The **Profile Details** screen reloads with a success message.
  - The updates are immediately published to the Directory. (Note: If the profile was previously not published, the act of saving publishes it to the Directory.)

If there is an error, an error message appears and your information is not changed. Correct the error and try again.

2. If you change your mind and do not want to apply the changes, click **Cancel** at the top of the form.

If a field is not available for editing, to change the field you need to send an email with your request to [ContactUpdates@otn.ca](mailto:ContactUpdates@otn.ca).

Save Cancel

**ABC Hospital Family Clinic**

Organization: ABC Hospital  
Site ID: SIT0123  
Site Type: Family Medicine  
Hosts Patients: Yes  
LHIN: 7 - Toronto Central  
Address: 105 Moatfield Drive, Toronto, ON, M3B 3M3

**SERVICES AND PROGRAMS**

Catchment Area Served:  
Enter LHIN, Region/District or specific sites that are applicable

Services and Programs Available:

Telemedicine Program Instructions:  
Indicate instructions for patient.

Figure 4: Edit site profile form

### Ncompass Scheduling and Site Profile Information

When you update a site profile, the information is shared with [Ncompass](#) (the OTNhub “Schedule” service).

When the following ‘system’ fields in a site profile are updated, Ncompass updates its system information with the new content:

- System Name\*\*
- Scheduling Notes
- Telemedicine Contacts (TMCs)\*\*
- Room Name
- Nursing Support
- Telemedicine Contact’s Priority
- Usage
- Peripherals Available\*\*

### PAN Sites and Site Profile Information

When an OTNhub user searches for an OTN Patient Access Network (PAN)\*\*\* site while scheduling a video visit, the following fields are visible:

- Telemedicine Program Instructions
- Nursing Support
- Patient Eligibility
- Peripherals Available\*\*

PAN site profiles for sites with non-OTN systems can also be published to the **Public Health Services Directory** ([phsd.otn.ca](https://phsd.otn.ca)). For instructions on publishing PAN site profiles, see [Publishing a PAN \(host\) site to the Health Services Directory](#).

Find a Patient Host Site

Consultant: Dr Emma James  
Consultant System: Dr Emma James

Date Site Time Details

The following sites meet the criteria to host your patient:

Toronto, ON, Canada

Toronto Central CCAC - Toronto  
Hosts Patients | Nursing Support | Peripherals | 0.5 km

\*Please review site instructions before proceeding\*

Telemedicine Program Instructions:  
Patient Eligibility:  
Patient Eligibility description

☐ Indigenous Services ☐ French Language Services [View site profile](#)

Figure 5: Schedule PAN site

\* Only after you change the contents of a field or add content to an empty field will the **Save** button become active (turn a darker shade of blue and can be clicked).

\*\* To change these fields, send an email to [ContactUpdates@otn.ca](mailto:ContactUpdates@otn.ca).

\*\*\* PAN sites are designated physical locations for any patient in Ontario to attend a virtual visit in their own community. This enables equitable access to care when there are patients not able to access technology.

## Fields Available for Editing Within a Site Profile

The following tables contain fields that you can edit—in order of appearance within the Edit Profile screen. These fields are used to help schedulers consider the appropriateness of your site. (Note: Fields that you cannot edit are not listed in these tables.)





If a field is not applicable, do not leave it blank. State “Not applicable”.

Field Name	Description
<b>Services and Programs</b>	
Catchment Area Served	The geographical district(s) from which the site will accept patients/clients. For example: All of Ontario.  Only complete if you restrict patients from outside a region.
Services and Programs Available	List the general programs, services, or therapeutic areas of virtual care available at the site. For example: Geriatric Mental Health or Cardiology.  Indicate if there are any program profiles for your site.
Telemedicine Program Instructions	Indicate your hours of operations including lunchtime closures, fees associated with using your facility (parking, missed appointments etc.), and other relevant program instructions.
Patient Eligibility	Describe 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 that your site is unable to provide. If you accept all patients with no restrictions, indicate this in here.
Indigenous Services	<b>Only Ontario Health (OTN) can edit this field.</b> Indicates whether the site offers culturally appropriate patient services to the Indigenous population. Defaults to ‘No’.  When set to ‘Yes’, it lets First Nations/Metis communities know they can connect with the site for services that consider their cultural sensitivities.  You can apply to Ontario Health (OTN) to have the site profile updated with this set to ‘Yes’. (See the <a href="#">Indigenous Services FAQ</a> for details.)
French Language Services	Defaults to ‘No’.  Select ‘Yes’ if the site offers a full French experience ( <i>i.e.</i> , not just a translator).  If you host patients, please contact Ontario Health (OTN) at 1-855-654-0888 or <a href="mailto:info@otn.ca">info@otn.ca</a> to update the directions in the French version of your Ncompass patient letter.

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The screenshot shows a web form titled "ABC Hospital Family Clinic". At the top are "Save" and "Cancel" buttons. Below the title, organization details are listed: Organization: ABC Hospital, Site ID: SIT0123, Site Type: Family Medicine, Hosts Patients: Yes, LHIN: 7 - Toronto Central, and Address: 105 Moatfield Drive, Toronto, ON, M3B 3M3. A section titled "SERVICES AND PROGRAMS" contains three input fields: "Catchment Area Served:" with a placeholder "Enter LHIN, Region/District or specific sites that are applicable", "Services and Programs Available:" (a large empty box), and "Telemedicine Program Instructions:" with a placeholder "Indicate instructions for patient."

**Figure 6:** Edit site profile form

Field Name	Description
<b>Availability / Scheduling</b>	
Hosts Patients	<p>Select the option that best describes the <b>site's status</b> for accepting patients for video visit appointments.</p> <p>If one or more systems at the site can host patients, select Yes or Conditional and you must also identify each system that hosts patients using its <a href="#">system Usage field</a>.</p> <p><b>Yes:</b> Site can host any/all patients.</p> <p><b>Conditional:</b> Hosts patients, but limited by certain conditions (e.g., geography, specialty, etc.). If selected, describe the conditions in the Conditions field.</p> <p><b>Closed:</b> Temporarily unable to host patients. If you have identified your site as closed, you need to identify which systems normally host patients.</p> <p><b>No:</b> Does not host patients.</p>
Conditions	<p>If there are specific conditions under which the site will accept referrals for video visits, type a description of each condition (e.g., geography, specialty, must be able to walk up four stairs, etc.)</p>
Site Availability	<p>If the site is available for eVisits only on specific days or during specific times, describe the limitations. Indicate your hours of operations including lunchtime closures.</p>
Scheduling Instructions	<p>Describe any instructions required to schedule an eVisit appointment with the site.</p> <p>For example: This site uses Ncompass scheduling to book patient appointment times and video systems. Ncompass is updated with all available times per system so please email the telemedicine contact to request videoconference system time.</p>
Referral Instructions	<p>If the site has any processes or rules in place for eVisit events, describe them here. If these have already been described in another field, or if this is not applicable, specify "not applicable".</p>
Clinical Protocols and Forms	<p>Clinical protocols are procedural documents and forms provided by health care providers, sites, or programs. These protocols can be instructions, explanations, or questionnaires intended to help the patient or referring physician understand what is required for a clinical eVisit session. This in turn helps the health care provider and the host site to properly prepare for and conduct the session.</p> <p>A site might have general protocols but can also have protocols that apply to specific consultants who present at the site.</p> <p>If you have clinical protocols or forms, you can:</p> <ul style="list-style-type: none"> <li>• Publish links to these documents in the site's profile, which users can click to access. (If the files are available from an existing web site or internet location.)</li> <li>• Attach files to the site's profile for users to view or download.</li> </ul> <p>You can <a href="#">add, delete or edit protocols</a> from the <b>View Profile Details</b> page. (If you are in 'edit' mode, to change to "view" mode, cancel or save your changes and scroll down in the profile details to the "Clinical protocols" section. Click <a href="#">Add New</a> or a <b>Delete</b> icon  or an <b>Edit</b> icon .</p>

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Field Name	Description
Healthcare Professionals Available	Identifies whether <b>Nursing Support</b> is available with one or more of the site's systems. This field must also be identified at the <a href="#">system level</a> .
Telemedicine Contacts	Contact information (name, title, phone and fax) of the person(s) to be contacted regarding the eVisit events at this site.  If you need to add, change or delete contact information related to a site, email <a href="mailto:ContactUpdates@otn.ca">ContactUpdates@otn.ca</a> .
<b>Systems</b>	
System Name <sup>N</sup>	A read-only field. An Ontario Health (OTN)-assigned unique character set that identifies a specific system and contains the Site ID of its parent site.
Room Name <sup>N</sup>	If the room has a designated name to identify it within the site, type it here. For example, Room 321 or Clinical Studio.
Room Description	Describe the room that houses the system, such as its capacity, location, and possible uses.
Usage <sup>N</sup>	Select which types of events the site can host and whether the system can host patients:  <b>Hosts Patients</b> indicates that the system is used to host patients for a video visit (telemedicine event), whether that be conditionally or without conditions. If the system can host patients, be sure that you also complete the <a href="#">site Hosts Patients field</a> (in the site details) — to show if the system can host any and all patients or has conditions for hosting.  <b>Clinical</b> events directly or indirectly disclose patient information.  <b>Educational</b> events involve a speaker and an audience, such as conferences, workshops, interest group sessions, training programs lunch and learn sessions.  <b>Administrative</b> events involve two or more parties, and the content is administrative in nature, such as committees, working groups, project status reports, or interviews.
Scheduling Notes <sup>N</sup>	Describe any conditions or special features that affect the system.  This field is important to advise members on how to coordinate with your site. Be sure to include how to coordinate (via Ncompass or email), hours of operation, who to contact, if time is required between appointments, and nursing support availability.  For example:  Events may be secured without phoning the site for System 01 & 02 based on Ncompass availability. Hours of operation are 08:00-16:00. If there is no availability, please contact the clerk at <a href="mailto:telehealthcoord@example.on.ca">telehealthcoord@example.on.ca</a> as another system may be secured. If an assessment is required, mark time prior to the event in Ncompass. Please send an email to <a href="mailto:telehealthcoord@example.on.ca">telehealthcoord@example.on.ca</a> once Ncompass events are confirmed or cancelled. Nursing support is available if the studio is available.  Or  Clinical events should be booked in system 4 unless otherwise specified. Allow 15 minutes between appointments. Email Ncompass requests & confirmations to TMC 1 or TMC 2. For urgent requests, please call (519-555-1234x5678) or email both telemedicine coordinators. Nursing support is available. Hours of operation Monday-Friday 0800-1600 ET.

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<sup>N</sup> These fields are shared with [Ncompass](#) (the OTNhub “Schedule” service).

Field Name	Description
Nursing Support <sup>N</sup>	Defaults to 'No'. Select 'Yes' if the system offers nursing support.
Peripherals Available <sup>N</sup>	Identifies which telemedicine devices are available for use with a system. Peripherals cannot be edited by the site editor and can be updated only by Ontario Health (OTN) staff. For changes to a site or system, email <a href="mailto:ContactUpdates@otn.ca">ContactUpdates@otn.ca</a> .
Accessibility	Select which types of accessibility the system offers.
Telemedicine Contacts <sup>N</sup> (TMCs)	<p>Contact information (name, phone, fax and email) of the person(s) to be contacted regarding eVisit events using this system.</p> <p>If you need to add, change or delete contact information related to a system, email <a href="mailto:ContactUpdates@otn.ca">ContactUpdates@otn.ca</a>.</p> <p>You can identify or change the priority of the listed TMCs. That is, who should be contacted first, second, third, etc.</p> <ul style="list-style-type: none"> <li>For each TMC, click the <b>Priority</b> drop-down arrow and select the desired number.</li> <li>You must assign a priority for all TMCs under the system.</li> </ul>
<b>Contact Information</b>	
Parking Instructions	<p>Describe any relevant information about parking at the site. If provided, this information appears under the Google map in the right navigation panel of the site's profile page.</p> <p>This information is not in Ncompass nor is it visible to patients.</p>

Telemedicine Contacts: (assign contact(s) in priority order)

Priority: 2

Name: ABC Clinic Booking Clerk

Phone: 7055558600x3831

Fax: 7055557561

Email: [booking@abc.org](mailto:booking@abc.org)

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Priority: 1

Name: Alfonso Quiver

Phone: 48600x3343

Fax: 57936

Email: [aquiver@abc.org](mailto:aquiver@abc.org)

**Figure 7:** Telemedicine Contacts

<sup>N</sup> These fields are shared with [Ncompass](#) (the OTNhub "Schedule" service).

## Managing Suggested Updates

The suggest an update feature lets an OTNhub user submit a comment, an enhancement or a correction for the Directory profile of a person who offers virtual care or a Directory site profile. For example, if they notice an out-of-date phone number or an incomplete list of available languages.

### Suggested Updates Notifications

When someone submits a suggested update, OTNhub does the following:

- Sends the site editor or person-profile owner (and their delegates) an email notification.
- For person and site profiles, adds a notification indicator to the affected Directory profile.
- For person profiles:
  - Adds a notification indicator to the profile owner's (and their delegates') OTNhub banner user icon.
  - Adds an indicator showing the number of suggestions that are available to review to the Manage Directory Profile link (in the OTNhub user panel).

You can view all suggested updates by clicking **View Suggested Updates** in the email notification, which opens the target profile.

Or open your **User Panel** (👤) and click the associated **Manage Directory Profile** link to view the profile details.

When viewing the profile details, click the **View suggested updates** link at the top of the screen.

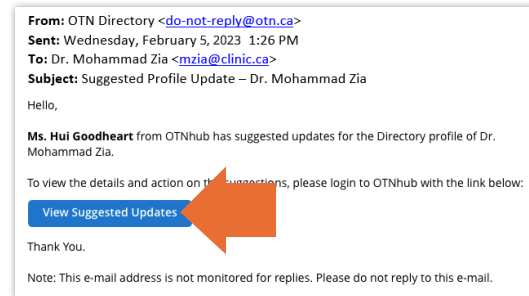


Figure 8: Email from 'suggest an update' feature

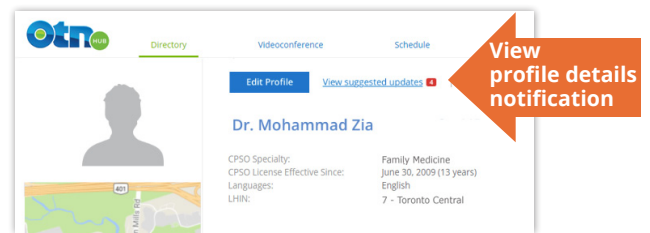


Figure 9: Profile with 'suggested updates' indicator

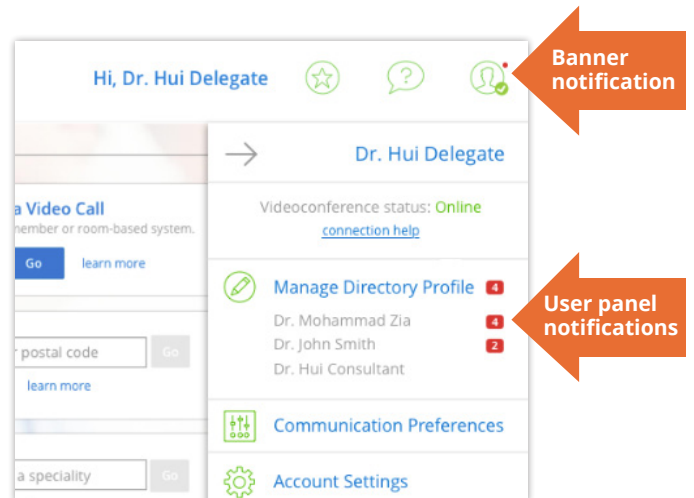


Figure 10: Banner and user panel (with delegators) showing 'suggested updates' indicators



## Accepting or Rejecting Suggested Updates

The suggested updates form contains two tabs - **Pending** and **Completed**.

Suggestions are listed in reverse chronological order (most recent at the top).

1. Review the suggestions.
2. To perform an action (accept or reject), select the checkbox beside the desired suggestion and then click the **Approve** or **Reject** button at the top of the form.
  - A success message briefly appears.
  - The updated profile information is saved.
  - The accepted updates are immediately published to the Directory.
  - The processed suggestions move to the Completed tab.

If there is an error, an error message appears and the profile is not changed. Correct the error and try again.

3. If the suggestion includes only a note, to move it to the Completed tab, click [Mark as read](#).
  - A success message briefly appears.
  - The processed note moves to the Completed tab with a status of "Read".

Directory / Dr. Mohammad Zia / Suggested updates

Suggested updates for Dr. Mohammad Zia

Pending 3 | Completed

☐ Select All Approve Reject

11/11/2020 09:30am by Hui Goodheart

Telemedicine Practice Address

☐ Phone: 416-345-6670  
416-345-6690

☐ Fax: 416-345-6670  
416-345-6690

Notes: "I tried to contact you by phone without success. I found th

10/31/2020 13:20pm by Hui Admin

General Information

☐ Languages: French

Notes: "we don't offer that services now"

Figure 11: Pending suggested updates

Directory / Dr. Mohammad Zia / Suggested updates

Suggested updates for Dr. Mohammad Zia

Pending 3 | Completed

☐ Select All Approve Reject

11/11/2020 09:30am by Hui Goodheart

Telemedicine Practice Address

☒ Phone: 416-345-6670  
416-345-6690

☐ Fax: 416-345-6670  
416-345-6690

Notes: "I tried to contact you by phone without success. I found th

10/31/2020 13:20pm by Hui Admin

General Information

☒ Languages: French

Notes: "we don't offer that services now"

Figure 12: Selected pending suggested updates

Directory / Dr. Mohammad Zia / Suggested updates

Suggested updates for Dr. Mohammad Zia

Pending | Completed

11/11/2020 09:30am by Hui Goodheart Approved

Telemedicine Practice Address

- Phone: 416-345-6670  
416-345-6690

Notes: "I tried to contact you by phone without success. I found that your office has moved and phone, fax no. updated."

11/11/2020 09:30am by Hui Goodheart Rejected

Telemedicine Practice Address

- Fax: 416-345-6670  
416-345-6690

Notes: "I tried to contact you by phone without success. I found that your office has moved and phone, fax no. updated."

Figure 13: Completed suggested updates



## Managing Clinical Protocol Attachments and Links

Clinical protocols are procedural documents and forms provided by health care providers, sites, or groups/programs.





These protocols can be instructions, explanations, or questionnaires intended to help the patient or referring physician understand what is required for a clinical eVisit session. This helps the health care provider and the host site to prepare for and conduct the session.

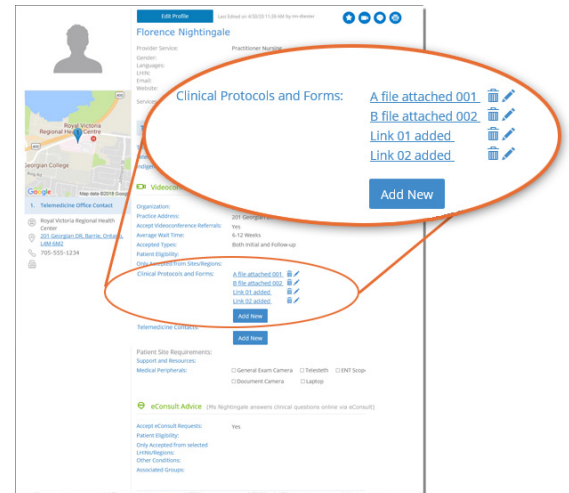
A site might have general protocols but can also have protocols that apply to specific consultants who present at the site.

People (both virtual care and in-office providers), places, and groups/programs can have associated clinical protocols, which are accessible on their **View Profile Details** page.

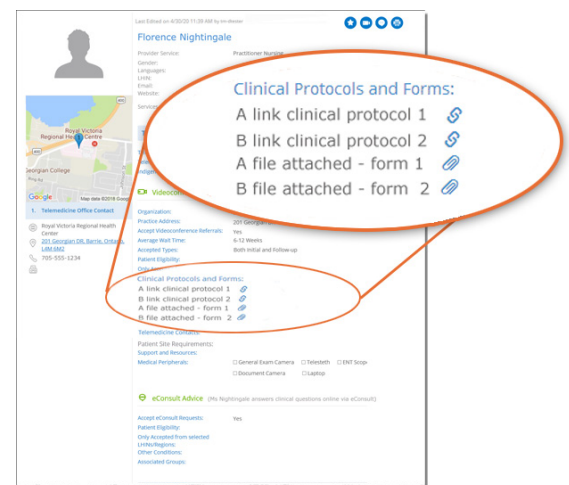
If the person/place has a website or internet repository where they keep publicly accessible files, the protocol can be a link to these documents. Or the protocol can be an attached file.

When viewing a profile:

- **If you do not** have administrative rights, protocols appear as plain text with a linked icon on the right.
  - If the protocol is a web location, a **URL Link** icon  appears.
  - If the protocol is an attachment, a **File** icon  appears.
- **If you have** administrative rights, protocols appear as blue underlined text along with edit  and delete  icons on the right.



**Figure 14:** Clinical protocols section with edit permissions




**Figure 15:** Clinical protocols section with no edit permissions

## Accessing Clinical Protocols Fields

The clinical protocols fields are accessible on the **View Profile Details** page

### For your own profile

1. Sign in at [otnhub.ca](https://otnhub.ca), click the **User Panel** link  in the top right banner.  
A **User/Self-Service** panel appears.
2. Click the **Manage Directory Profile** link in the panel.  
Your **View Profile Details** screen appears.
3. Scroll down to the **Clinical Protocols and Forms** section.

### For another person or site's profile

1. Sign in at [otnhub.ca](https://otnhub.ca) and go to the **Directory** service.
2. [Search for the person](#) and locate their name in the results list and click the name to display the [profile details](#).  
The **Profile Details** screen appears.
3. Scroll down to the **Clinical Protocols and Forms** section.

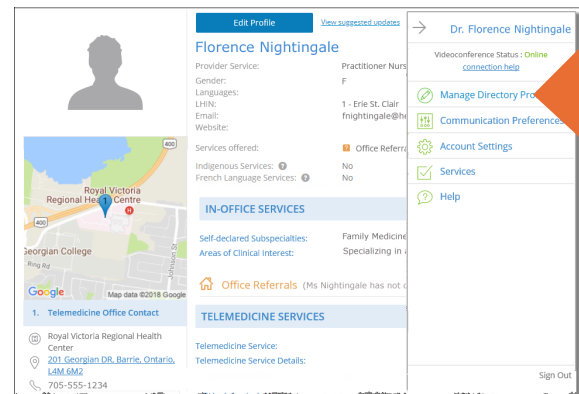


Figure 16: Change from edit mode to view mode for your own profile

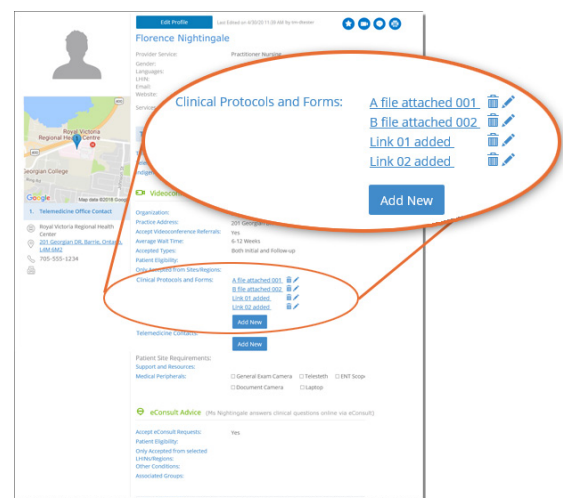


Figure 17: Protocols section in View Profile Details

## Adding a File or Link

Access the [protocols section of a profile](#) and to view the fields needed for adding a new link or file, click **Add New**.

A protocol panel appears with fields to identify a URL or file.

### To add a new URL link:

1. Click **URL** under the title **Provide Clinical Protocol or Form as**.
2. Type the **full URL** in the text field under the **URL** button. (Include [http://](#) or [https://](#) at the beginning and the file type extension (e.g., .doc, .pdf) at the end.)
3. Type a meaningful name for the link in the **Display Name** field and then click **Add**.

The **View Profile** screen reloads with the updated **Clinical Protocols and Forms** list.

4. Test the link to ensure that it works. (For example, a broken link could be caused by spelling mistakes or other errors.)

### To add a new file,

1. Click **File** under the title **Provide Clinical Protocol or Form as**.  
A File Explorer window opens.
2. Navigate to the desired file\* and click to select.  
The selected file name appears under the **File** button.
3. Type a meaningful title for the file in the **Display Name** field and then click **Add**.

When the URL or file is successfully added, the **View Profile** screen reloads with the updated **Clinical Protocols and Forms** list and a success message briefly appears.

\* You can attach only the following file types:  
doc/.docx, .pdf, .rtf, .txt, .jpeg/jpg, .xls/xlsx, .png, .tiff, .bmp, .gif, .ppt/.pptx.

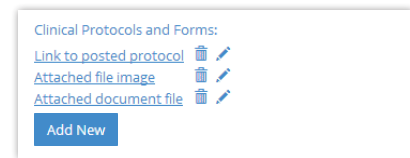


Figure 18: Clinical protocols

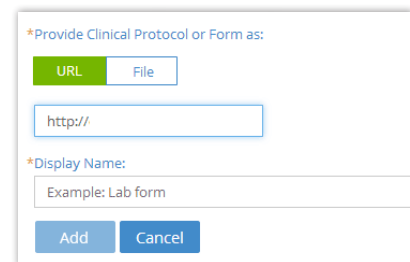


Figure 19: Add URL clinical protocol

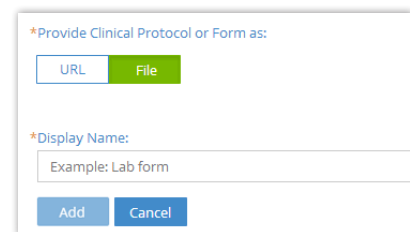



Figure 20: Add file clinical protocol

## Editing a Link or Display Name

For clinical protocols that are links, the edit feature allows you to change the URL Link or its Display Name.

For clinical protocols that are files, the edit feature allows you to change the attached file or its Display Name.

### To access the clinical protocol fields:

[Access the protocols section of a profile](#) and click the **Edit** icon  beside a listed item.

The protocol panel appears with the current link/file and its associated Display Name.

### To edit a URL link:

1. Change the URL or **Display Name** as desired.
2. To apply the update, click **Apply**.
3. The **View Profile** screen reloads with the updated **Clinical Protocols and Forms** list.
4. Test the link to ensure there are no spelling mistakes or other errors.

### To edit a file:

1. To change the attached file, click **File** under the title **Provide Clinical Protocol or Form as**.  
A File Explorer window opens.
2. Navigate to the desired new file\* and click to select.  
The selected file name appears under the **File** button.
3. To change the **Display Name** field, type an updated name and then click **Apply**.

When the file or URL Link is successfully updated, the **View Profile** screen reloads with the updated **Clinical Protocols and Forms** list and a success message briefly appears.

\* You can attach only the following file types:  
doc/.docx, .pdf, .rtf, .txt, .jpeg/jpg, .xls/xlsx, .png, .tiff, .bmp, .gif, .ppt/.pptx.

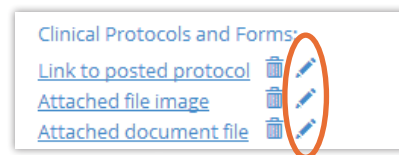



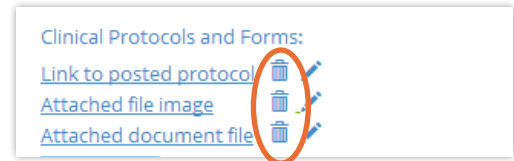
Figure 21: Protocol edit icons

Figure 22: Edit protocol URL fields

Figure 23: Edit protocol file fields

## Deleting a File or Link

1. [Access the protocols section of a profile.](#)
2. To remove a URL/file, click the **Delete** icon  beside the item.  
A Confirmation dialog box appears.
3. To confirm and delete the URL/file, click **Delete**.  
The deletion occurs and a success message briefly appears at the top of the screen.  
If you change your mind and do not want to delete, click **Cancel**.



**Figure 24:** Protocol delete icons