

Updating Scheduling Permissions

An organization's Ontario Health (OTN) **Primary Contact for Service (PCS)** supports the delivery of virtual health care services within their organization. They manage the scheduling permissions for their registered users. An organization's PCS plays a critical role in preventing privacy breaches by periodically reviewing OTNhub scheduling permissions for users in their organization.

A PCS can use the **Manage Active Users** dashboard to view a **list of users** at an organization and then find a specific user to:




- View the current permitted systems for scheduling a video event and then [add or remove a system](#) (Note: A 'system' can be a PCVC or a room-based system.)
- View the current access to schedule a clinical event* and then [add or remove the ability to schedule a clinical event](#).
- View and edit the [Videoconference Settings](#) for a user.

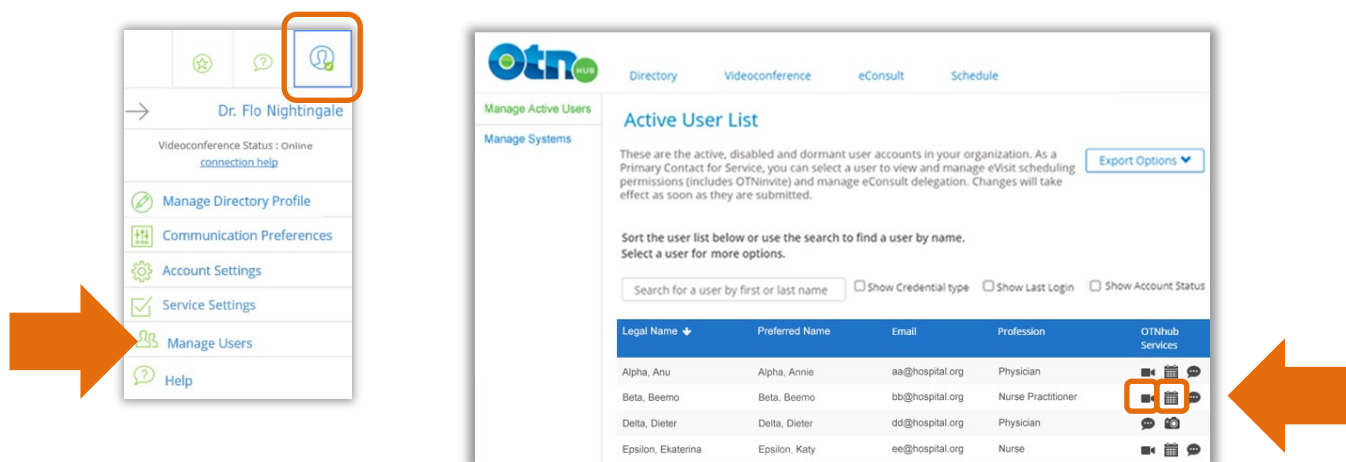
These instructions describe how a PCS can manage scheduling permissions for their active OTNhub users. The changes take effect immediately.









(To view and manage all users who can schedule for a specific system, see [Using the Manage Systems Dashboard](#).)

Accessing the Manage Users Feature and Locating a User

If you are a PCS for your organization, the OTNhub User panel shows a 'Manage Users' option.

1. Sign in at [otnhub.ca](#), click the **User Panel** link  in the top-right banner, and then click **Manage Users**.
2. Locate the desired user in the **Active User List**. To filter the listed names, search for a user by typing at least two characters in the **Search for a user** field.
3. Click the **Scheduling (Ncompass)** icon  or the **Videoconference (PCVC)** icon  for that user.



Legal Name	Preferred Name	Email	Profession	OTNhub Services
Alpha, Anu	Alpha, Annie	aa@hospital.org	Physician	 
Beta, Beemo	Beta, Beemo	bb@hospital.org	Nurse Practitioner	 
Delta, Dieter	Delta, Dieter	dd@hospital.org	Physician	 
Epsilon, Ekaterina	Epsilon, Katy	ee@hospital.org	Nurse	 

* Access to personal health information in the OTNhub is permitted only for the purpose of providing, or supporting the provision of, healthcare to patients. Any collection, use (including access to or viewing), disclosure or retention of personal health information by delegates in relation to their use of OTNhub is deemed to be on behalf of the member (organization or solo practitioner) and is subject to the Personal Health Information Protection Act, 2004.

Managing Clinical Scheduling Permissions

You can view the current clinical permissions and list of systems permitted for scheduling a video event.

When given *clinical* scheduling permissions, a user can add patient information to a video event and view the patient information in OTNhub Scheduling (Ncompass) and eVisit (Videoconference).

If the user currently has clinical scheduling permission, a check mark appears beside the ☒ **Ability to schedule a clinical event** field.

Users without clinical permissions can see clinical events, however the patient information is masked with asterisks.

You can change scheduling permissions only for 'active' users and for one user at a time.

1. To permit the selected user to *schedule clinical events* and see patient information, select the ☒ **Ability to schedule a clinical event** check box.

To remove the permission, clear the

- ☐ **Ability to schedule a clinical event** check box.

2. To initiate the request, click **Continue**.

A confirmation screen appears.

3. Review the information to ensure it is correct.

4. To **confirm** the change and immediately update the user's account, click **Submit**.

If all is okay, the eVisit Scheduling screen reloads, and a success message appears.

The changes take effect immediately.

The screenshot shows the 'eVisit Scheduling' section for user Phil Barnes. It includes fields for Preferred name, Email, Profession, and Last login. A checkbox labeled 'Ability to schedule a clinical event' is highlighted with an orange box. Below this is a search bar for adding new systems and a section for current scheduling permissions. At the bottom, there are 'Continue' and 'Cancel' buttons. An orange arrow points to the 'Continue' button.

* Continue button becomes active only after you select a system.

The screenshot shows a confirmation screen titled 'Change(s) to Scheduling Permissions and/or Access - Please Confirm'. It asks the user to confirm their changes and displays a table with user information: Legal Name (Phil Barnes), Preferred Name (Phil Barnes), Email (pbarnes@abc.org), and Profession (Nurse). Below the table, it shows 'Ability to schedule Clinical Events: ADDED'. At the bottom, there are 'Submit' and 'Back' buttons.

Managing System Scheduling Associations

When an eVisit (PCVC) or room-based system is 'associated' with a user's account, that user becomes a 'scheduling delegate' for the system. When a user is associated with a system:

- They can schedule the system for video visits using OTNhub (eVisit or Ncompass).
- The system will appear in their Ncompass calendar, the Ncompass 'My Systems' drop-down list, and their eVisit 'Schedule on behalf of' drop-down list.

The **eVisit Scheduling** form allows you to add or remove system associations for a user.

Search for and add a system

Remove a system

Adding a system to a user account

1. To search for a user's PCVC system or a room-based system, type two to three characters of the last name, first name, contact email, or the system name in the **search field**. The search results appear in alphabetical order.
2. Click the desired system name in the search results. list. A **To Be Added** section appears with the selected system.
3. To add more systems:
 - To add *a specific system*, repeat steps #1 and-#2.
 - To add *all systems for a site*, click the "add all" link in the site title bar.
4. Review the **To Be Added** list for accuracy.
5. If you need to change the pending systems:
 - To remove *a specific system*, click the associated 'delete' link.
 - To remove *all pending systems*, click the "delete all" link in the site title bar.
6. To initiate the request, click **Continue**. A confirmation screen appears.
7. Review the information to ensure it is correct.
8. To **confirm** the change and immediately update the user's account, click **Submit**.

Search results with PCVC user systems

Search results with room-based systems

"Add all" link

"To be added" list

If all is okay, the eVisit Scheduling screen reloads with updated information and a success message appears.

The changes take effect immediately.

Removing a system from a user account

1. To remove a single system, click the “remove” link associated with the system you want to remove. To remove all systems at a site, click the “remove all” link in the site title bar.

The system(s) pending removal change to a light grey colour.

Current Scheduling Permissions

eVisit scheduling access is enabled for this list of PCVC users or systems. You can remove access by selecting 'remove'.

Site ID	System Name	Room Description	Actions
1234	TOR_ABC_1234_CLIN_01	Clinic Room 01	remove
1235	TOR_ABC_1234_CLIN_05	Clinic Room 05	remove
1236	TOR_ABC_1234_CLIN_06	Clinic Room 06	undo
2236	Uvergo Yost		remove
3433	Wendel Willie		remove
4375	Zelda Zong		remove

Continue Cancel

Remove all systems at a site

Undo the “remove” action

Remove a specific system

2. If you want to cancel this action, click the associated “undo” link (or click the “undo all” link if you used the “remove all” action).

3. To initiate the request, click **Continue**.

A confirmation screen appears.

Change(s) to Scheduling Permissions and/or Access - Please Confirm

Please confirm your changes.

Legal Name	Preferred Name	Email	Profession
Sally Ann Afedoe	Sally Ann Afedoe	safedoe@st.ca	Nurse

List of the removed systems (1):

Name	Site Name
TOR_ABC_1234_CLIN_06	ABC Hospital

Submit Back

4. Review the information to ensure it is correct.
5. To **confirm** the change and immediately update the user’s account, click **Submit**.

If all is okay, the Current Scheduling Permissions list reloads with the updated information and a success message appears.

The changes take effect immediately.

Managing a User's Videoconference Settings



Updating the TAC for a user

The Primary Therapeutic Area of Care (TAC) identifies a user's typical videoconference usage.

It is important for reporting purposes, both for Ontario Health (OTN) and the Ontario Ministry of Health.

The TAC is applied to every videoconference event, when an eVisit is scheduled or an on-demand video call is started.

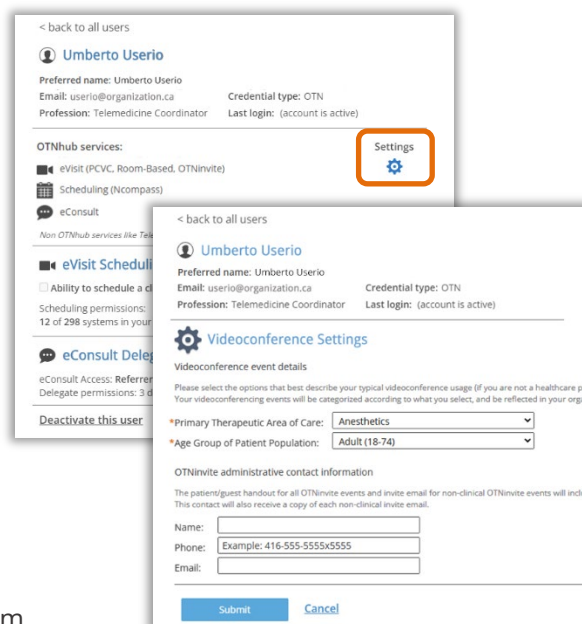
If the user is not a health care provider, select "Other" and "All Ages".

1. [Access the Manage Users dashboard](#) and click on a **user's name** in the list.
2. In the **OTNhub services** section, click  beside the **eVisit** service.
3. To identify the primary event type for the user, click the **Primary Therapeutic Area of Care** drop-down arrow and select the appropriate entry from the list.
4. To identify the primary age group the user will cater to, click the **Age Group of Patient Population** drop-down arrow and select the appropriate entry from the list.
5. To save the new settings, click .

If all is okay, the Settings screen reloads, and a success message appears.

If there is an error, an error message appears. Correct the error and try again.

Legal Name	Preferred Name	Email	Profession	OTNhub Services
Alpha, Anu	Alpha, Annie	aa@hospital.org	Physician	  
Beta, Beemo	Beta, Beemo	bb@hospital.org	Nurse Practitioner	  
Userio, Umberto	Userio, Umberto	uu@hospital.org	Physician	  
Zee, Zepher	Zee, Zepher	zz@hospital.org	Nurse	  






< back to all users

Umberto Userio


Preferred name: Umberto Userio
Email: userio@organization.ca
Profession: Telemedicine Coordinator

Credential type: OTN
Last login: (account is active)

OTNhub services:


-  eVisit (PCVC, Room-Based, OTNinvite)
-  Scheduling (Ncompass)
-  eConsult

Non OTNhub services like Telemedicine

-  eVisit Scheduling

Ability to schedule a visit: ☐

Scheduling permissions: 12 of 298 systems in your organization

 eConsult Delegation

eConsult Access: Referenced
Delegate permissions: 3 of 298 systems in your organization


Deactivate this user

< back to all users

Umberto Userio

Preferred name: Umberto Userio
Email: userio@organization.ca
Profession: Telemedicine Coordinator

Credential type: OTN
Last login: (account is active)

 **Videoconference Settings**

Videoconference event details

Please select the options that best describe your typical videoconference usage (if you are not a healthcare provider, select "Other" for both options). Your videoconferencing events will be categorized according to what you select, and be reflected in your organization's reporting.

*Primary Therapeutic Area of Care: **Anesthetics**

*Age Group of Patient Population: **Adult (18-74)**



OTNinvite administrative contact information

The patient/guest handout for all OTNinvite events and invite email for non-clinical OTNinvite events will include this contact. This contact will also receive a copy of each non-clinical invite email.

Name:

Phone: Example: 416-555-5555x5555

Email:


Updating the OTNinvite administrative contact

The Admin Contact can include a name, phone, and email for the team or department within a user's organization.

When provided, the Admin Contact information appears in the following places.

- Clinical Events in patient handouts only
- Learning & Meeting Events in both email invitations and patient handouts.

To add admin contact information, do the following:

1. Type the information in the appropriate fields (**Name**, **Phone**, and **Email**).
2. To save the new settings, click .

If all is okay, the Settings screen reloads, and a success message appears.

If there is an error, an error message appears. Correct the error and try again.