Updating a Person's Profile

Note: Your '*directory profile*' is not the same as your OTNhub '*account information*'. (Account information is only for Ontario Health (OTN) internal purposes and is not available to the public. There are separate instructions for updating your account information.)

If you do not have edit permissions (*i.e.*, no Edit button appears), you can suggest an update.

Delegates with editing permissions for a profile owner can also update the profile.

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.

See also, Updating a Site Profile.

Accessing Your Directory Profile

You can edit most fields within your own **Directory profile**, with the following exceptions:

- To update CPSO fields, you need to contact the The College of Physicians and Surgeons of Ontario.
- To update read-only fields, you need to contact Ontario Health (OTN) Member Services.
- Physicians not registered with Ontario Health (OTN) can sign up for OTNhub.

Updating your own profile or a delegator's profile

1. Sign in at 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. Or if you are a delegate, click the desired delegator's name.

   The **Profile Details** screen appears.

3. To directly edit your profile, click the **Edit Profile** button.

   To manage updates submitted by other OTNhub users, click the "*View suggested updates*" link.

Updating another person's profile (e.g., for a delegator)

1. Sign in at 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 with an **Edit Profile** button at the top.

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

3. To directly edit the profile, click the **Edit Profile** button.

   To manage updates submitted by other OTNhub users, click the "View suggested updates" link.

Ensure your profile is always up-to-date.

Check every so often that all the information is current and accurate.

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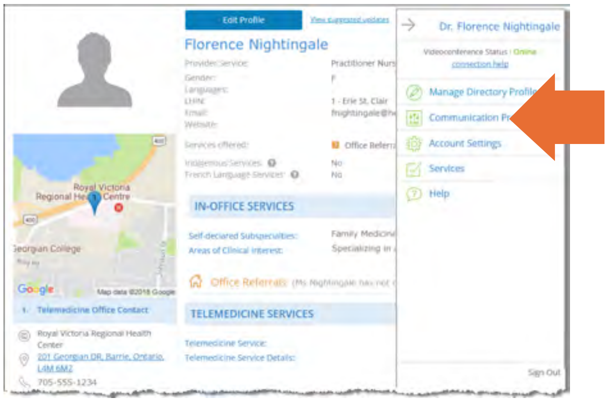

Figure 1: Edit your own profile

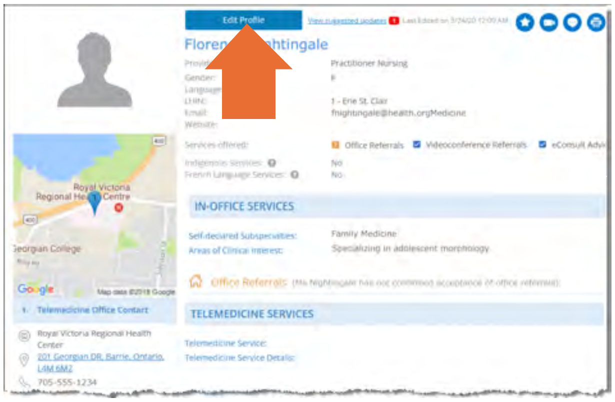

Figure 2: Edit another person's profile

Editing a Person Profile

You can update your own profile or a delegator's profile directly yourself or you can apply changes delivered by the "Suggest an Update" feature. (See [Managing Suggested Updates](#) on page 9.).

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

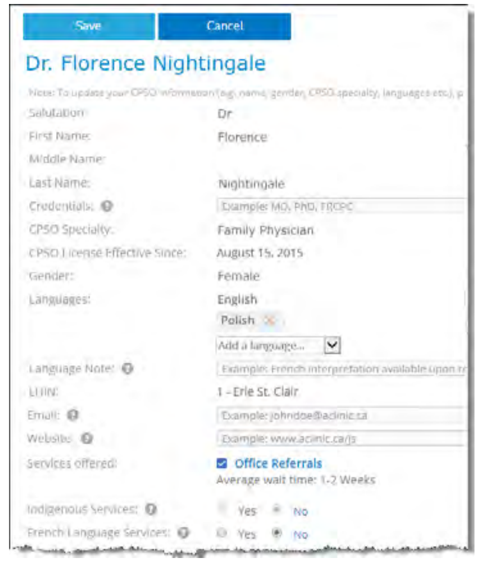

Figure 3: Edit person profile details

Fields Available for Editing Within a Person Profile

The following tables contain fields that you can edit—in order of appearance within the Edit Profile screen.
(Note: Fields that you cannot edit are not listed in these tables.)

Field Name	Description
General Information	
Credentials	If you want to have credentials appear after your name (in the search results list and your profile details), type the credential initials here. For example: MD, PhD, FRCPC
Languages	The Languages field can include both fields that you can and cannot edit. For physicians registered with the CPSO, the Language field is pre-populated with data from their CPSO information and you cannot edit it. You can edit a language that you have added yourself. If you offer service in other languages besides English, list them here. For example: French or Tagalog. To add a language, click the field drop-down arrow and select one or more languages from the list.
Language Note	Additional details about languages offered, translation services your organization provides and how to access them.
Email	The email address to receive referrals, profile updates, service or data-related inquiries. Typically this is your email address or your administrator/delegate's email address.
Website	The URL where interested users can find more information about you and your services.
Indigenous Services	**Only Ontario Health (OTN) can edit this field**. Indicates whether you offer 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 you for services that consider their cultural sensitivities. You can apply to Ontario Health (OTN) to have your profile updated with this set to 'Yes'. (See the [Indigenous Services FAQ](#) for details.)
French Language Services	Defaults to 'No'. If the health care provider's office offers a full French experience (*i.e.*, not just a translator), select the 'Yes' option.

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* 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).

Field Name	Description
In-Office services	
Note: This section is available only for specialists in Toronto Central LHIN 7 as part of a pilot project.	
Self-declared Subspecialties	Select from the drop-down list one or more subspecialties you want listed in your profile. List only those you are professionally certified to provide.
Areas of Clinical Interest	Provide additional details about your specific areas of care that can help primary care providers learn more about your scope of practice for accepting patients and ensure you receive the correct referral type. For example: • Your practice focus within the specialty. • Any restrictions for the type of patients you see or the catchment area you serve. • Any non-OHIP services you offer.
Primary Practice for Office Referrals	
Note: The fields in this section are location specific. That is, if you have more than one practice location, you need to provide this information separately for each practice location.	
Accept Office Referrals	Identify if you accept referrals to see patients in your office.
Average Wait Time	Select the approximate time between the date when you receive a referral request and the date an appointment can be booked.
Accommodate Urgent Cases	Identify whether you accept urgent cases. If yes, provide additional details in the Urgent Case Note field.
Urgent Cases Note	Approximate wait times and specific referral conditions under which you accept urgent cases. You can also include instructions for how to submit an urgent request. For example, urgent cases will be seen within 5 business days.
Accepted Types	Select whether you will see only first-time patients or only patients for follow-up appointments or both.
Patient Eligibility	Restrictions or criteria (if any) for the patients who can be referred to you. These can include age, gender, requirement for medical history, current health status, etc. For example, only see patients above age 16.
Only Accepted from Regions	Restrictions (if any) for specific geographical areas from which you accept referrals such as LHIN or region, sub-regions, district, city, etc. For example, patient must reside in Scarborough.

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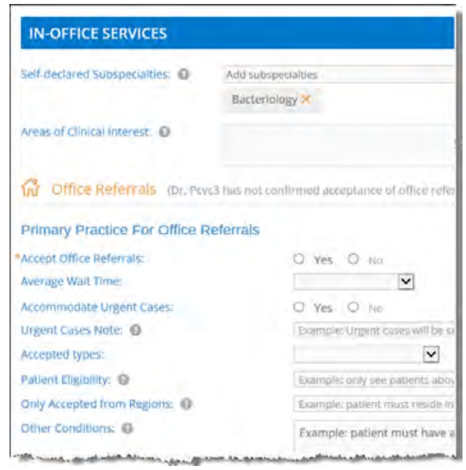

Figure 4: Profile > in-office services

Field Name	Description
Other Conditions	Other restrictions (if any) under which you will accept office referrals from other health care providers. For example, patient must have a family physician.
Availability	Restrictions for the dates or times during which you can provide consultations. For example, available only Tuesdays and Thursdays.
Referral Process	Enter all relevant procedural details on your referral process that a primary care provider must know when referring a patient to you. Details can help eliminate the back-and-forth between your two offices. For example: • The type of material that should accompany the referral, such as lab work, imaging, previous treatment, etc. • How long before the primary care office might hear back from you. • Who will contact/follow-up with patients about the appointments (your office or the referrer's office). • Any special referral form and whether it's mandatory or optional.
Clinical Protocols and Forms	These are procedural documents and forms for use by patient sites to help them properly prepare for and conduct a clinical session with you, the specialist. If you have documents that contain detailed clinical protocols or forms, you can: • Publish links to these documents in your Directory profile, which users can click to access. (If the files are available from an existing web site or internet location.) • Attach files to your Directory profile, which users can view or download. You can add, delete or edit protocols from the **View Profile Details** page. (If you are in edit mode, save your changes and scroll down in the profile details to the "Clinical protocols" section. Click "Add New".)
Office Contact	This is contact information provided by a physician's CPSO registration. You cannot edit most of the fields in this section. To update CPSO fields, you need to contact the The College of Physicians and Surgeons of Ontario. Within these contacts fields, you might be able to edit the phone and fax number fields. For example, with a secondary practice location or if the CPSO registration does not have a phone or fax number.

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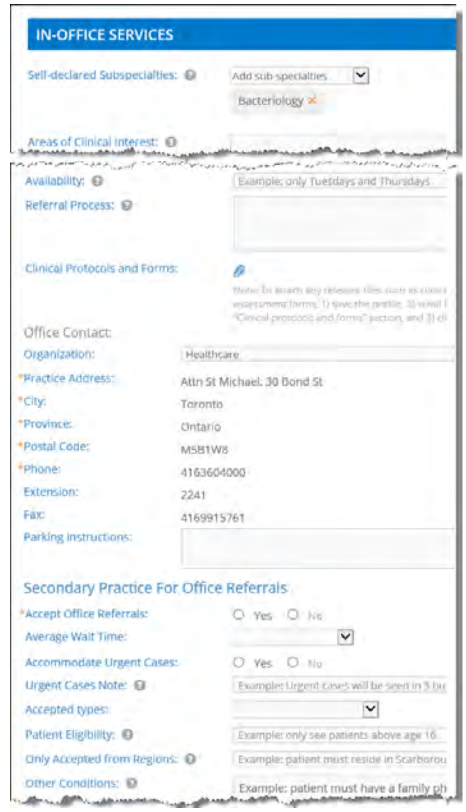

Figure 5: Profile > in-office services

Field Name	Description
Telemedicine Services	
Telemedicine Service	Select from the drop-down list one or more specialties for which you offer virtual health care services.
Telemedicine Service Details	If there is specific information about your telemedicine service that you would like to describe, type it in this field.
Videoconference Referrals	
Note: These fields appear only if you are a registered Videoconference user.	
Accepts Videoconference Referrals	Select the option that best describes the your status for accepting patients for eVisit videoconferencing. If you select conditional, describe the conditions in the Other Conditions field.
Average Wait Time	Select the approximate time between the date when you receive a referral request and the date an appointment can be booked.
Accepted Types	Select whether you will see only first-time patients or only patients for follow-up appointments or both.
Patient Eligibility	Describe any specific criteria for patients that can be referred to you for videoconferencing. For example: Only pediatric patients.
Only Accepted from Sites / Regions	If you will accept videoconference referrals only from specific areas, identify them here. For example, a LHIN number, region or district name, or specific site name or number.
Other Conditions	If there are specific conditions under which you will accept referrals for video consults, describe each condition. For example: Must have family doctor.
Availability	If you are available for video consults only on specific days or during specific times, describe the limitations. For example: Only Mondays and Wednesdays.
Scheduling Instructions	If you have any processes or rules in place for scheduling a video consult, describe them here. For example: Call the telemedicine contact for inquires regarding this intake process.
Clinical Instructions	If you have any processes or rules in place for your clinical events, describe them here. For example: Send referral to office for triage by consultant.

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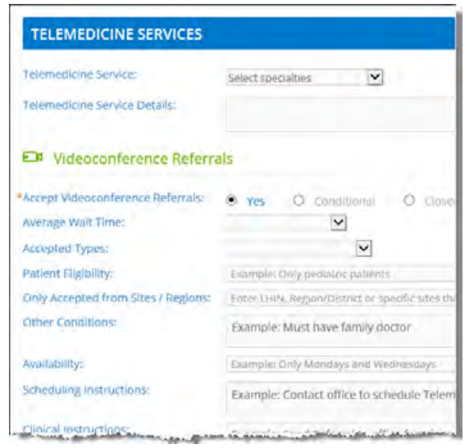

Figure 6: Profile Videoconference service

Field Name	Description
Clinical Protocols and Forms	These are procedural documents and forms for use by patient sites to help them properly prepare for and conduct a clinical session with you. If you have documents that contain detailed clinical protocols or forms, you can: • Publish links to these documents in your Directory profile, which users can click to access. (If the files are available from an existing web site or internet location.) • Attach files to your Directory profile, which users can view or download. You can add, delete or edit protocols from the **View Profile Details** page. (Save your changes and in the profile details, scroll down to the "Clinical protocols" section and click Add New.)
Telemedicine Contacts	Contact information (name, phone, fax, and email) of the person to be contacted regarding the video consult. You can add, delete or edit protocols from the **View Profile Details** 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 "*Videoconference > Telemedicine Contacts*" section. Click Add New or a **Delete** icon or an **Edit** icon.
Patient Site Requirements	Support and Resources • If you require that the patient site have specific support or resource requirements for a video consult, describe your requirements. • For example: Nursing support required for the full duration of the consult. Or patient physical assessment is required, specifically, medications list, height and weight measurements.
Medical Peripherals	• If you have peripheral devices that you use for videoconferencing, select all the devices that apply.

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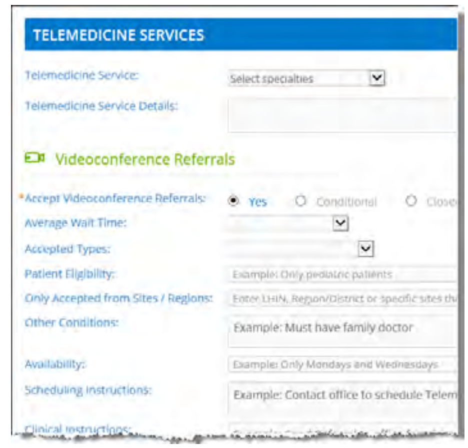

Figure 7: Profile Videoconference service

Field Name	Description
eConsult Advice	
Note: These fields appear only if you are a registered eConsult user.	
Accept eConsult Requests	Select the option that best describes the your status for accepting eConsult requests.
Patient Eligibility	Describe any specific criteria for patients that can be referred to you for advice via eConsult. For example: Only pediatric patients.
Only Accepted from Sites / Regions	If you will accept eConsult requests only from specific areas, identify them here. For example, a LHIN number, region or district name, or specific site name or number.
Other Conditions	If there are specific conditions under which you will accept eConsult requests, type a description of each condition. For example: Must have family doctor.
Associated Groups	Lists all groups, programs, and BASE managed specialties with which you are associated. The group/program name is a link to their Directory profile. If you want to be removed from a group/program, contact the group/program's administrator. The administrator is indicated in the group/program's directory profile.
Telemedicine Practice Address	
The practice address is the physical location of the your primary office. This is the published address that is available to health care providers searching the Directory and is used to generate the Google map accessed from the Directory. **Note**: Changing the practice address for your Directory profile will not update your Ontario Health (OTN) account address.	
Address	The street name and civic number of your primary office. Also include here the unit, floor, suite, or apartment number of the consultant's primary office.
City	The city name where your primary office is located.
Province	The province name where your primary office is located.
Postal Code	The postal code of your primary office. For example: A3A 3A3.

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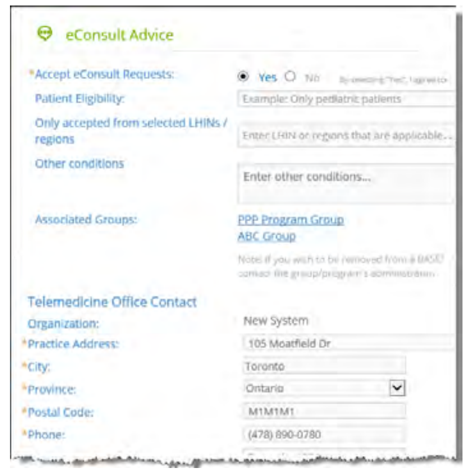


Figure 8: Profile eConsult service

Field Name	Description
Phone	The 10-digit office telephone number of your primary office. For example: 416-555-1234.
Extension	Office phone extension.
Fax	The 10-digit fax number of your primary office. For example: 416-555-9876. This number might be used to fax patient information, therefore do not use a fax machine that is in a public area.
Parking Instructions	If there are specific parking instructions for people visiting your office, describe them here.

About

If you want to publish information about your medical qualifications and professional memberships, you can describe them using these fields.

- Practicing Since
- Affiliations
- Professional Memberships
- Medical School
- Graduate School
- Internship
- Residency
- Fellowships
- Publications

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

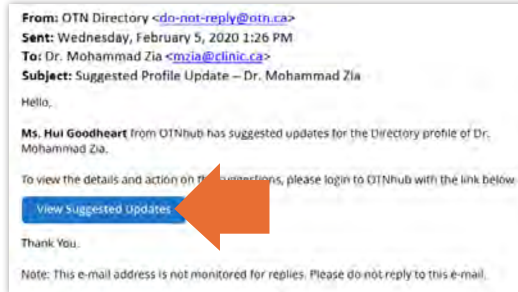
When someone submits a suggested update, OTNhub does the following:

- 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.


From: OTN Directory <do-not-reply@otn.ca>
Sent: Wednesday, February 5, 2020 1:26 PM
To: Dr. Mohammad Zia <mzia@clinic.ca>
Subject: Suggested Profile Update – Dr. Mohammad Zia

Hello,

Ms. Hui Goodheart from OTNhub has suggested updates for the Directory profile of Dr. Mohammad Zia.

To view the details and action on the suggestions, please login to OTNhub with the link below

View Suggested Updates

Thank You.

Note: This e-mail address is not monitored for replies. Please do not reply to this e-mail.

Figure 9: Email from 'suggest an update' feature

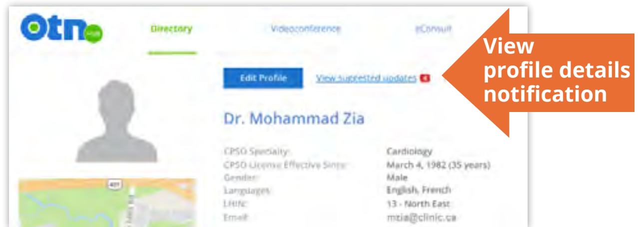


Figure 10: Profile with 'suggested updates' indicator

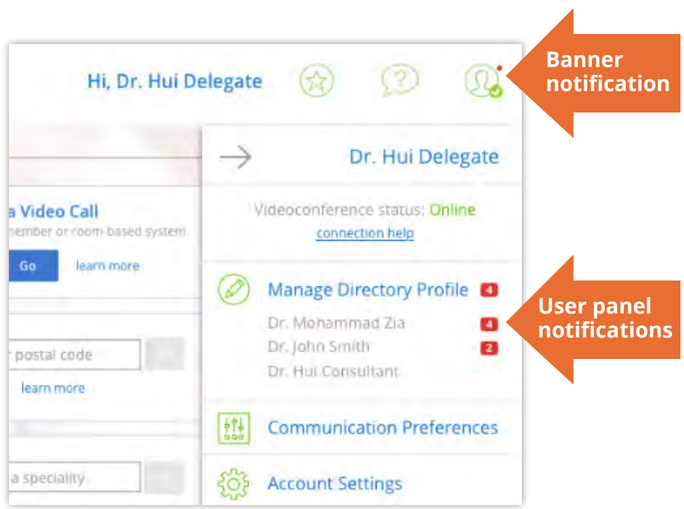


Figure 11: Banner and user panel (with delegators) showing 'suggested updates' indicators

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".

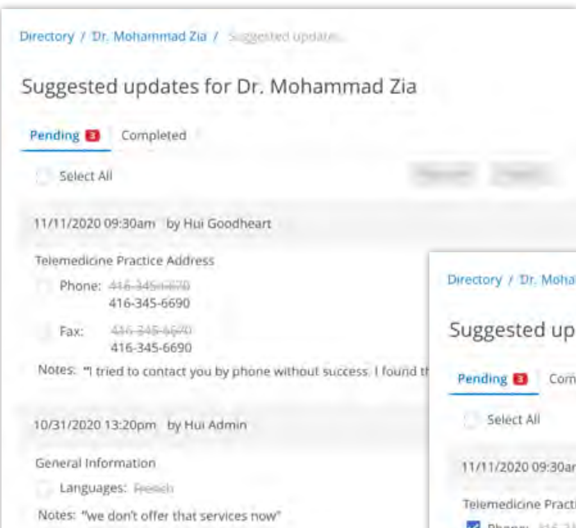


Figure 12: Pending suggested updates

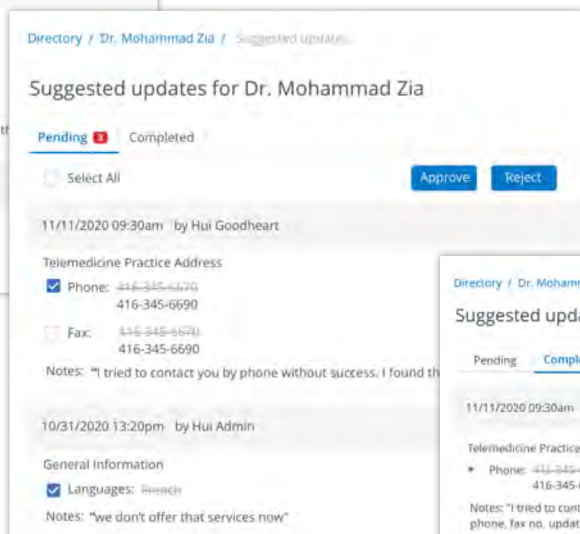


Figure 13: Selected pending suggested updates

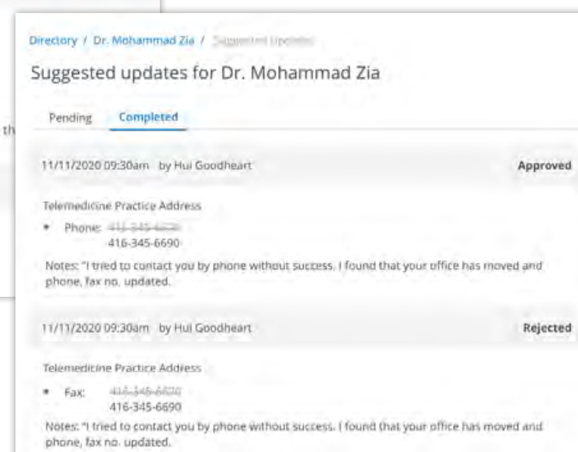


Figure 14: Completed suggested updates

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.

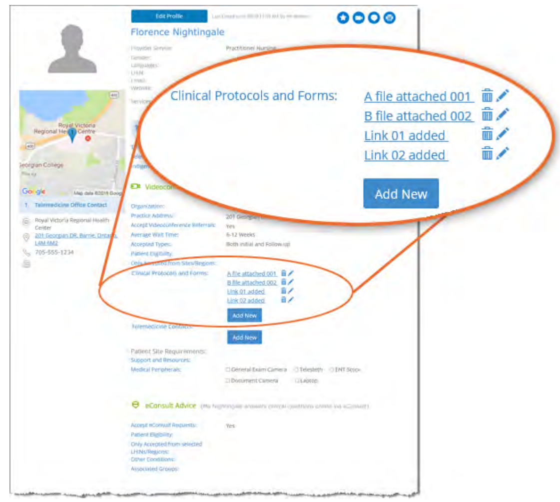


Figure 15: Clinical protocols section with edit permissions

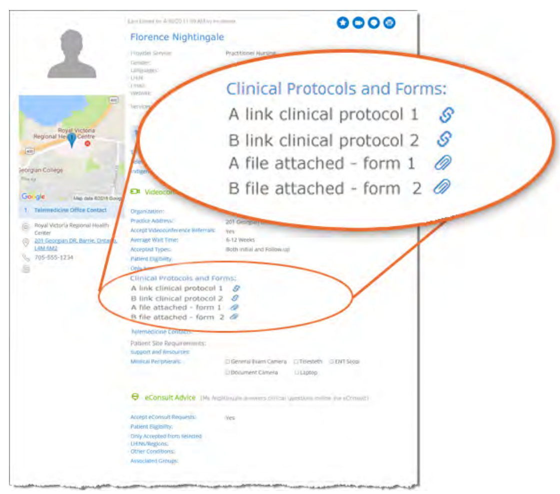


Figure 16: Clinical protocols section with no edit permissions

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, 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.

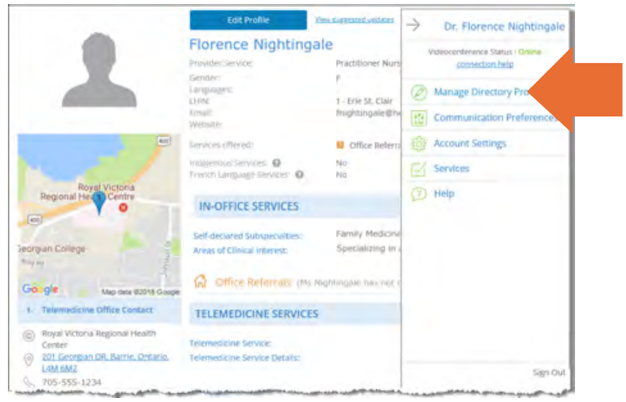


Figure 17: Change from edit mode to view mode for your own profile

For another person or site's profile

1. Sign in at 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.

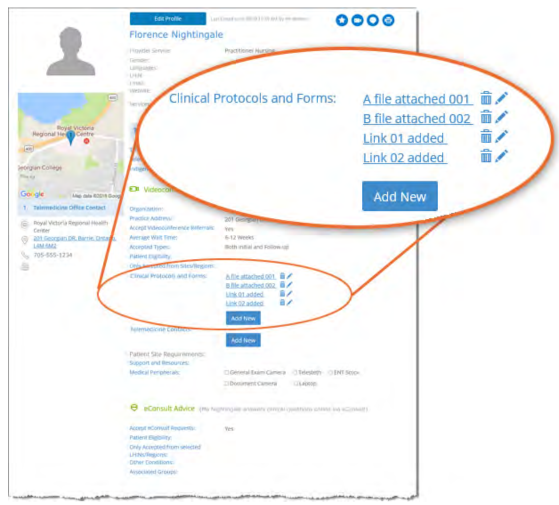


Figure 18: Protocols section in View Profile Details

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.

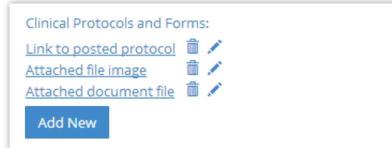


Figure 19: Clinical protocols

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.)

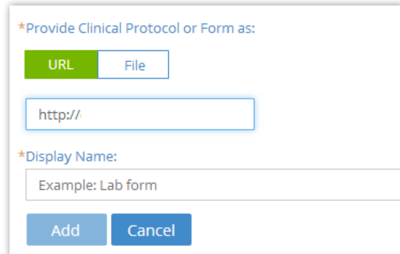


Figure 20: Add URL clinical protocol

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.

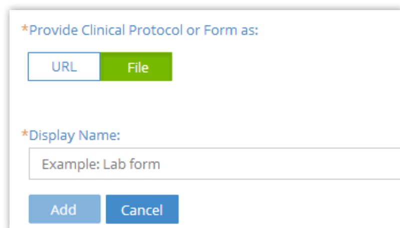


Figure 21: Add file clinical protocol

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

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.

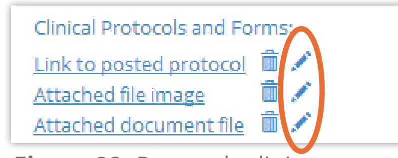


Figure 22: Protocol edit icons

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.

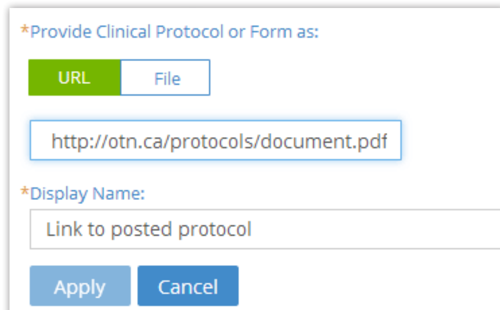


Figure 23: Edit protocol URL fields

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.

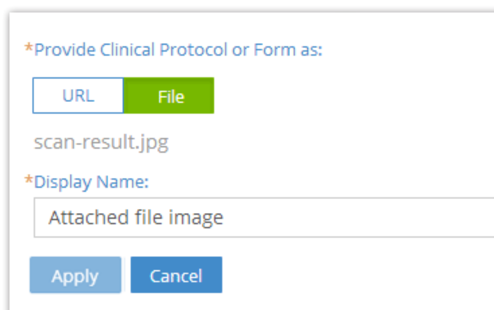


Figure 24: Edit protocol file fields

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

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.

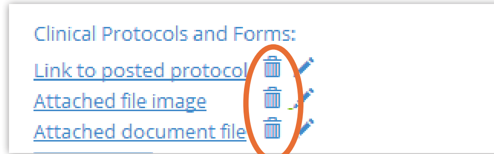


Figure 25: Protocol delete icons