OTNhub: Managing a Directory Profile

These instructions describe how to access and update an OTNhub **Directory profile** for a site, program/group, your personal Directory profile, or the Directory profile of a person for whom you are a delegate.

The profile information is published in the OTNhub Directory and is available for searching and viewing by all registered Directory users.

You can update your own profile and other profiles (**person, site, or group**) for which you have administrative permissions.

Notes

i) 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.)

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

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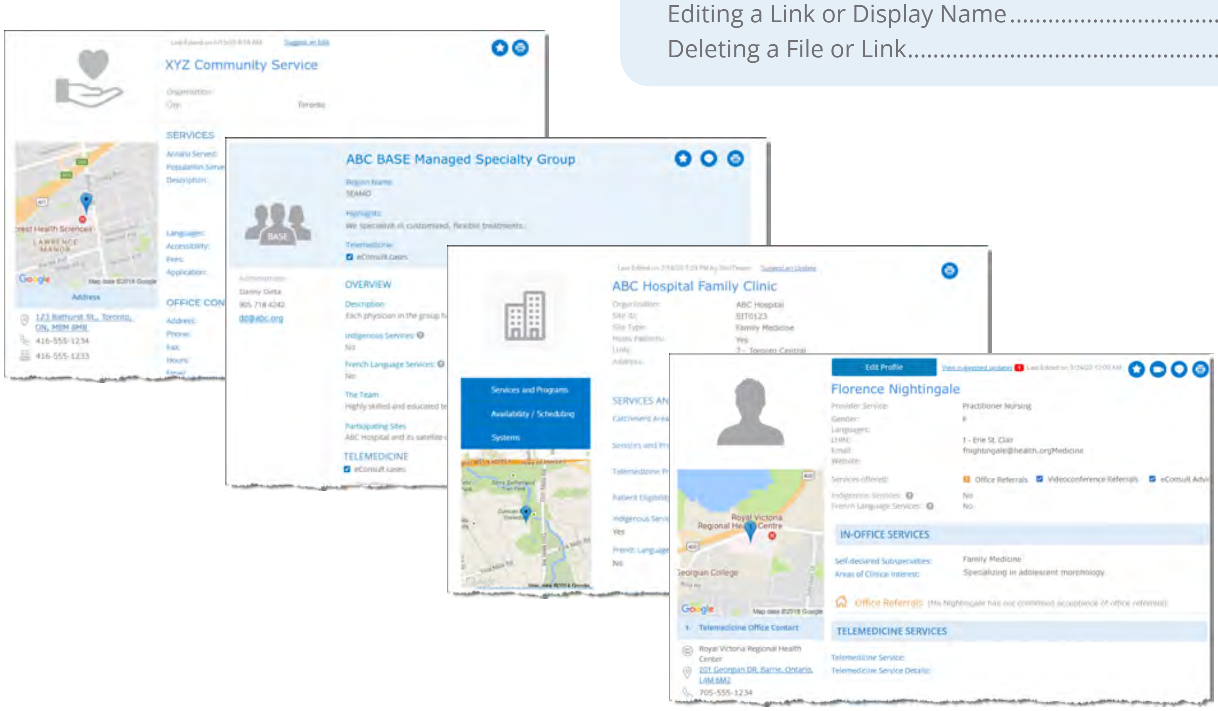

For further assistance and technical support, contact OTN Technical Support

Phone: 1-855-654-0888 **Email:** techsupport@otn.ca

People Profiles

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 are registered to use the Directory and you have a published profile, you can access your profile using the **Manage Directory Profile** link included in the user/profile/self-service panel.

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.

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.

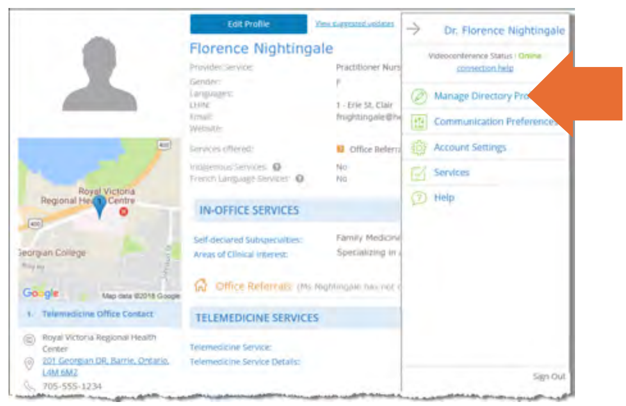

Figure 1: Edit your own profile

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

1. Sign in at otnhub.ca and go to the **Directory** service.

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.

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

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

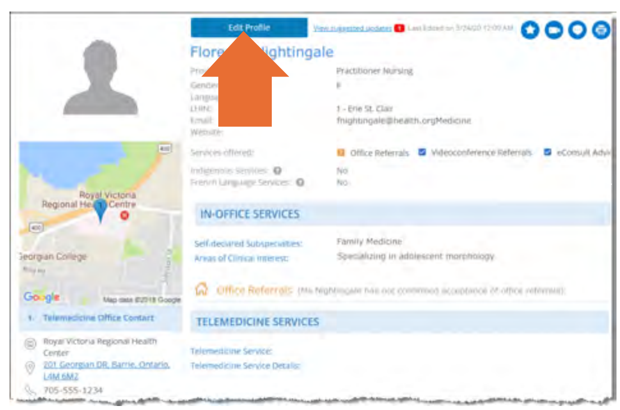

Figure 2: Edit another person's profile

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.

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 18.).

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.

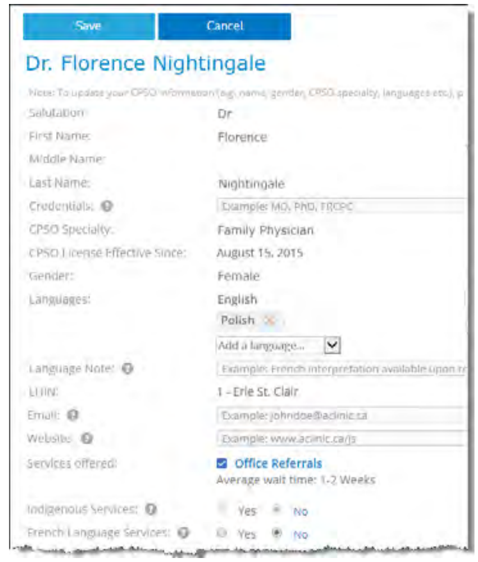

Figure 3: Edit person profile details

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 subspecialities 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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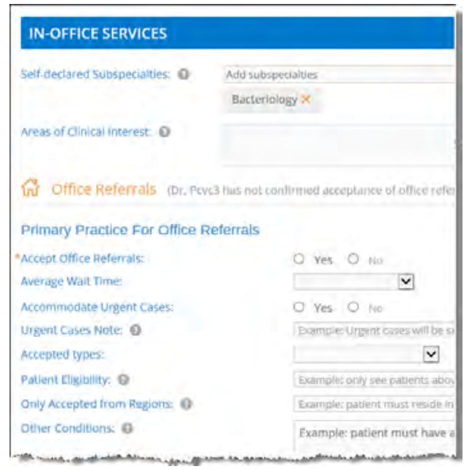

Figure 4: Profile > in-office services

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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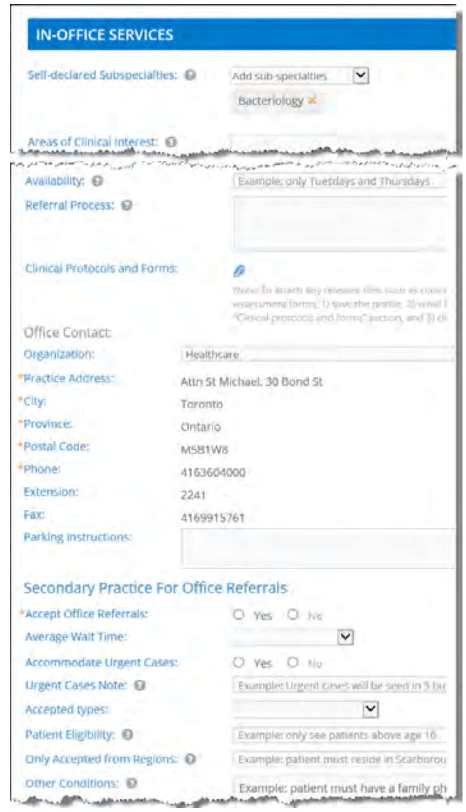

Figure 5: Profile > in-office services

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.

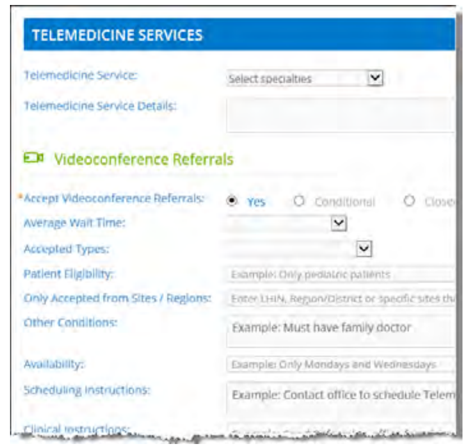

Figure 6: Profile Videoconference service

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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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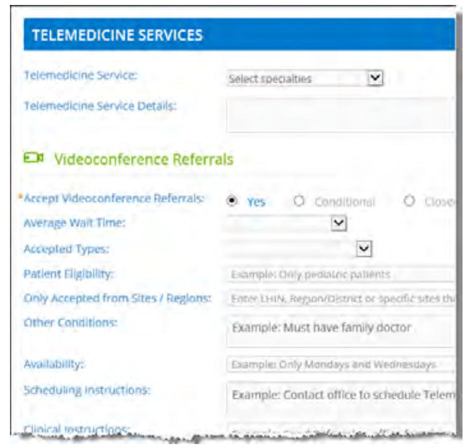

Figure 7: Profile Videoconference service

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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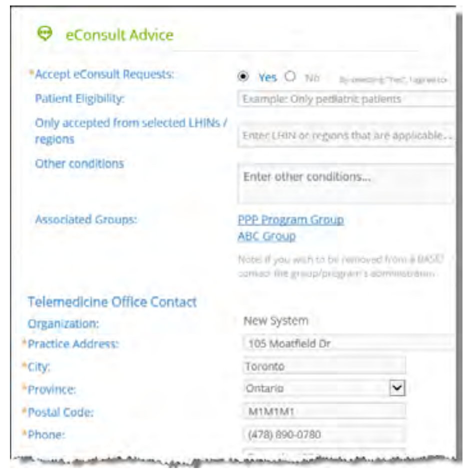

Figure 8: Profile eConsult service

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

Telemedicine Site Profiles

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.

Accessing a Site Profile

1. Sign in at otnhub.ca and go to the **Directory** service.
2. Search for the site, locate the site 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.
3. To view a summary of the systems at that site, click the **Systems** drop-down arrow.

   You can see at a glance which peripherals are available for each system at the site.
4. To manage updates submitted by other OTNhub users, click the “View suggested updates” link at the top of the profile screen.
5. 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.

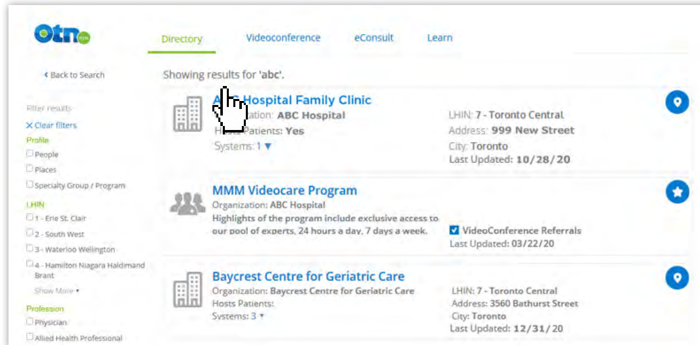

Figure 9: Directory search results

Figure 10: Site search results with systems displayed

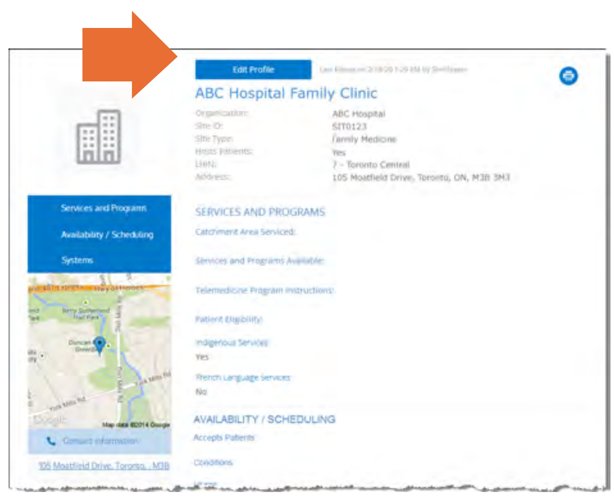

Figure 11: Site profile details

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.

Editing a Site Profile

You can edit a site profile for which you have administrative rights.

A site editor can update the site profile directly or can apply changes delivered by the "Suggest an Update" feature. (See Managing Suggested Updates on page 18.)

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.

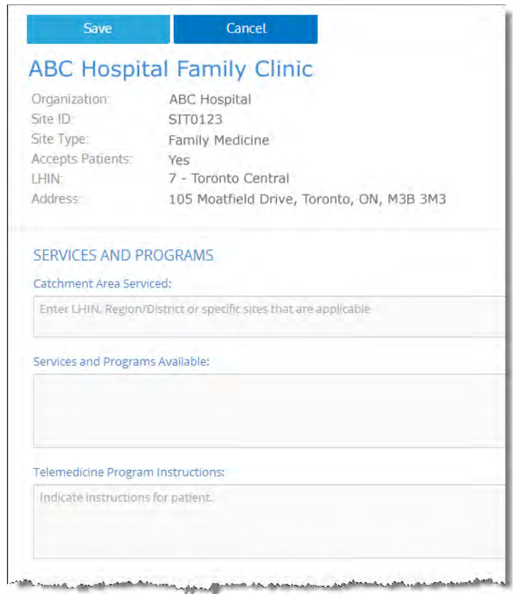

Figure 12: Edit site profile form

Site profile Information used by Ncompass Scheduling

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

* 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 this information, send an email to ContactUpdates@otn.ca.

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.(Note: Fields that you cannot edit are not listed in these tables.)

Field Name	Description
Services and Programs	
Catchment Area Serviced	The geographical district(s) from which the site will accept patients/clients. For example: All of Ontario.
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.
Telemedicine Program Instructions	Describe any specific information and instructions for participating in a particular virtual health care program offered at the site.
Patient Eligibility	Describe the criteria for hosting patients. For example: Accepts only patients who are currently registered with the clinic.
Indigenous Services	**Only Ontario Health (OTN) can edit this field**. 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 Indigenous Services FAQ for details.)
French Language Services	Defaults to 'No'. Select 'Yes' if the site offers a full French experience (*i.e.*, not just a translator). If you host patients, please contact Ontario Health (OTN) at 1-855-654-0888 or info@otn.ca to update the directions in the French version of your Ncompass patient letter.

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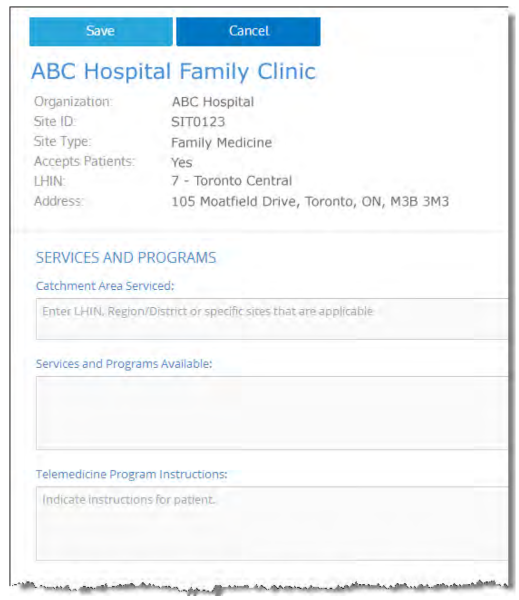

Figure 13: Edit site profile form

Field Name	Description
Availability / Scheduling	
Hosts Patients	Select the option that best describes the site's status for accepting patients for eVisit appointments. If you select conditional, describe the conditions in the Conditions field.
Conditions	If there are specific conditions under which the site will accept referrals for video consults, type a description of each condition. For example: Must be able to walk up four stairs.
Site Availability	If the site is available for eVisits only on specific days or during specific times, describe the limitations. For example: Only Mondays and Wednesdays.
Scheduling Instructions	Describe any instructions required to schedule an eVisit appointment with the site. 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.
Referral Instructions	If the site has any processes or rules in place for eVisit events, describe them here.
Clinical Protocols and Forms	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. A site might have general protocols but can also have protocols that apply to specific consultants who present at the site. If you have clinical protocols or forms, you can: • 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.) • Attach files to the site's profile for users to view or download. 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 "Clinical protocols" section. Click Add New or a **Delete** icon or an **Edit** icon.
Healthcare Professionals Available	Identifies whether **Nursing Support** is available with one or more of the site's systems. This field is edited at the system level.
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 ContactUpdates@otn.ca.

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Field Name	Description
Systems	
System Name[N]	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[N]	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[N]	Select which types of eVisit events the site can host: **Clinical** events directly or indirectly disclose patient information. **Educational** events involve a speaker and an audience, such as conferences, workshops, interest group sessions, training programs lunch and learn sessions. **Administrative** 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[N]	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 *telehealthcoord@example.on.ca* as another system may be secured. If an assessment is required, mark time prior to the event in Ncompass. Please send an email to *telehealthcoord@example.on.ca* 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.
Nursing Support[N]	Defaults to 'No'. Select 'Yes' if the system offers nursing support.
Peripherals Available[N]	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 ContactUpdates@otn.ca.

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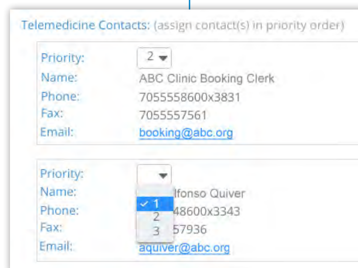
[N] These fields are shared with Ncompass (the OTNhub "Schedule" service).

Field Name	Description
Accessibility	Select which types of accessibility the system offers.
Telemedicine Contacts[N] (TMCs)	Contact information (name, phone, fax and email) of the person(s) to be contacted regarding eVisit events using this system. System TMCs are listed in order of priority, as defined by the site's Ontario Health (OTN) Primary Contact for Service. If you need to add, change or delete contact information related to a system, email ContactUpdates@otn.ca. If you are the **Ontario Health (OTN) Primary Contact for Service**, you can identify or change the priority of the listed TMCs. That is, who should be contacted first,second, third, etc. • For each TMC, click the **Priority** drop-down arrow and select the desired number.
Contact Information	
Parking Instructions	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.



N These fields are shared with Ncompass (the OTNhub "Schedule" service).

Group, Program, or BASE Managed Specialty Group Profiles

Groups, programs, and BASE Managed Specialty Groups have similar profiles and each is managed by a designated assigner.

Accessing a Group, Program, or BASE Managed Specialty Group

Profile

1. Sign in at otnhub.ca and go to the **Directory** service.
2. Search for the group, locate its name in the results list and click the name to display the profile details.

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

   If an **Edit** button does not appear, you do not have administrative rights.
3. To open the site's profile details with fields available for edit, click the **Edit** button.

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

For detailed edit instructions, see the following guides:

- Administering a Group/Program Profile
- Administering a BASE Managed Specialty Group Profile.

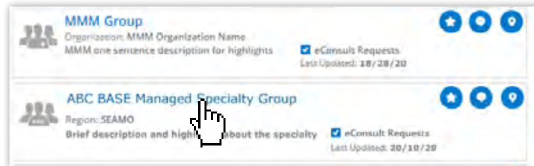


Figure 14: Search results list

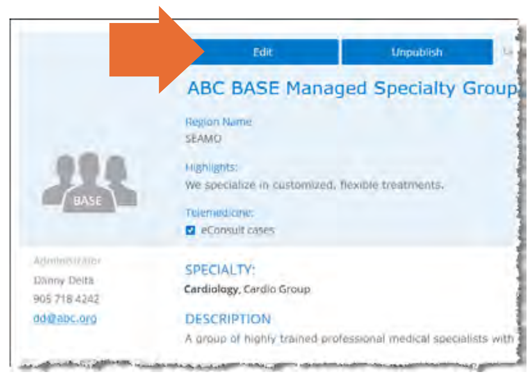


Figure 15: Profile details with edit button

Community Service Profiles

Note: Community services search is a pilot project and currently contains information only from the Toronto Central LHIN.

You cannot edit this information.

You can only suggest a change to the profile information.

All Community Service profiles are provided by the [Toronto Central Healthline](), which has its own update process.

Accessing a Community Service Profile

1. Sign in at [otnhub.ca]() and go to the **Directory** service.
2. [Search for the community service](), locate its name in the results list and click the name to display the [profile details]().

   The **Profile Details** screen appears .
3. To suggest an edit, click the **Suggest an Edit** link at the top of the profile panel.

   A new tab/window opens with the [Toronto Central Healthline]() update service web page.
4. Follow the Healthline's instructions to submit your suggestion.

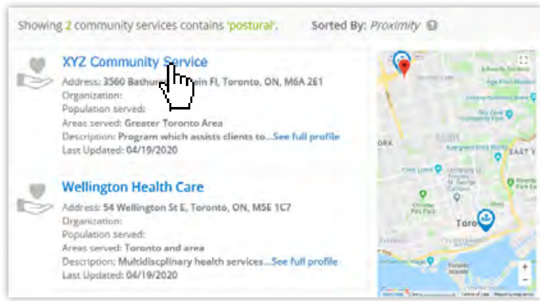


Figure 16: Community service search results

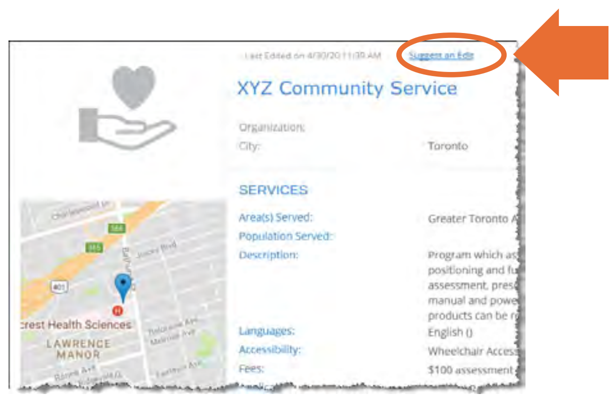


Figure 17: Profile details > Suggest an edit link

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.

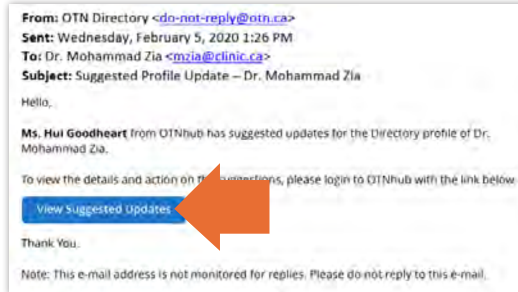


Figure 18: Email from 'suggest an update' feature

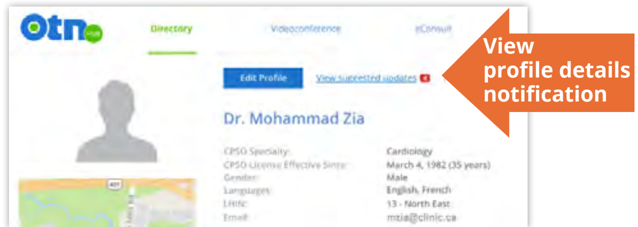


Figure 19: Profile with 'suggested updates' indicator

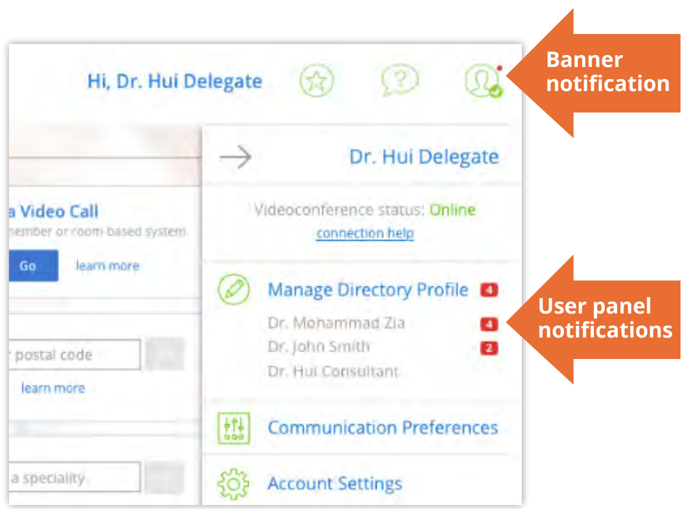


Figure 20: Banner and user panel (with delegators) showing 'suggested updates' indicators

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”.

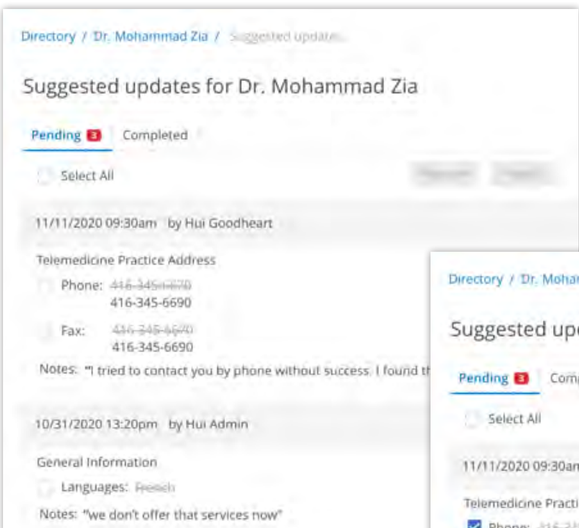


Figure 21: Pending suggested updates

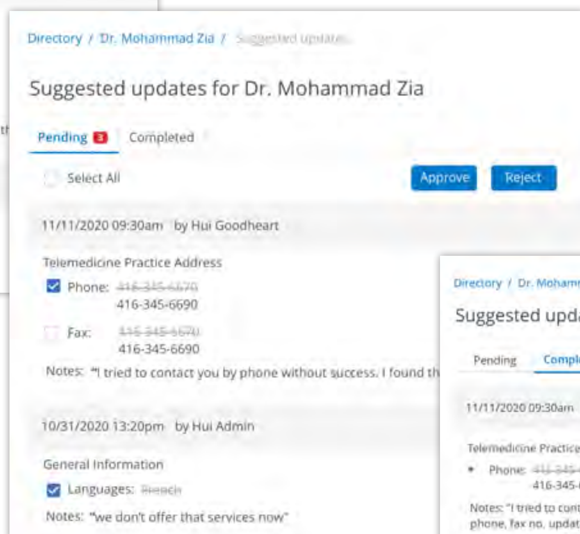


Figure 22: Selected pending suggested updates

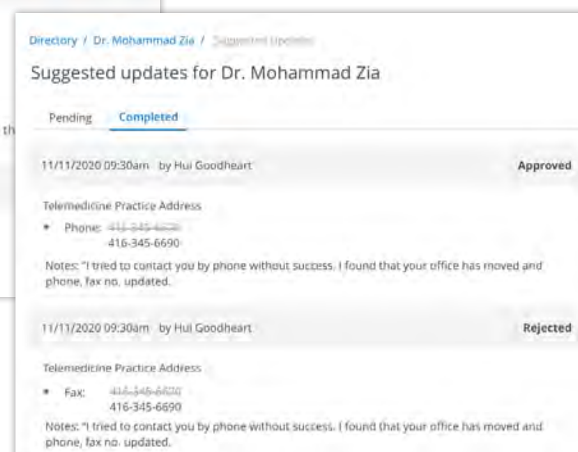


Figure 23: Completed suggested updates

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.

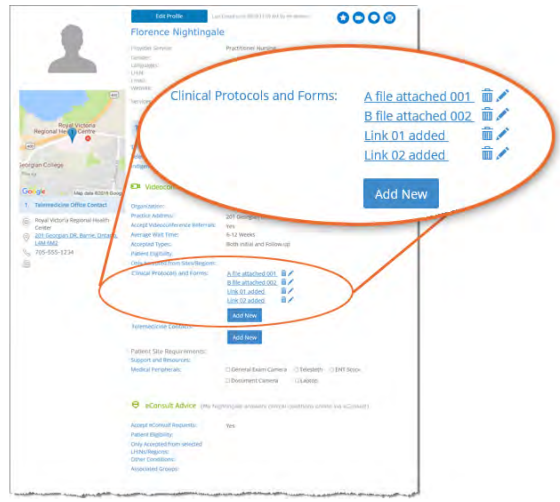


Figure 24: Clinical protocols section with edit permissions

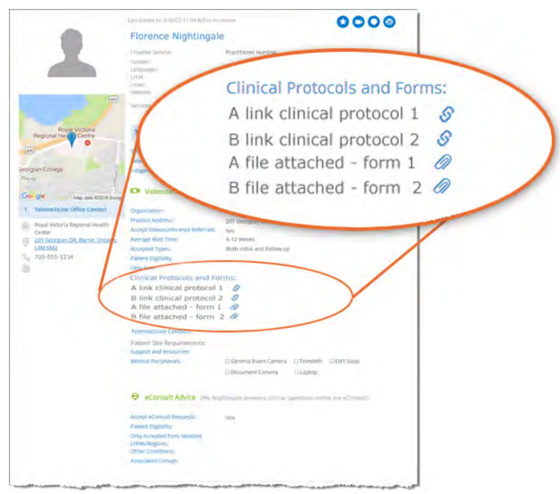


Figure 25: Clinical protocols section with no edit permissions

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.

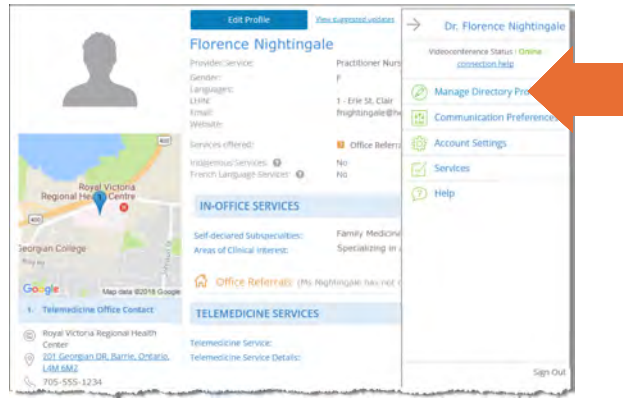


Figure 26: Change from edit mode to view mode for your own profile

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.

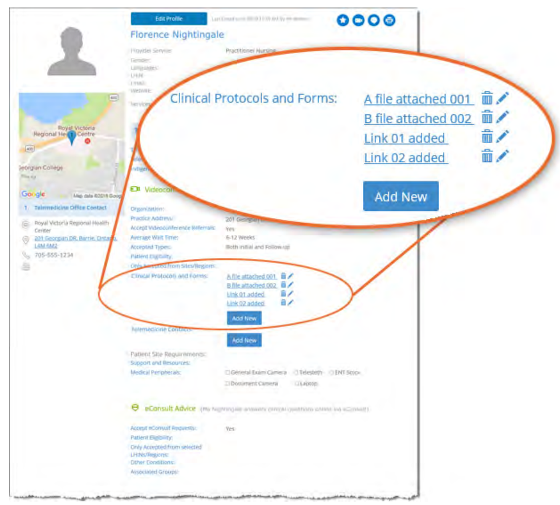


Figure 27: Protocols section in View Profile Details

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.

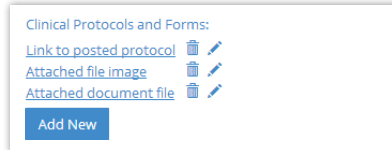


Figure 28: Clinical protocols

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.)

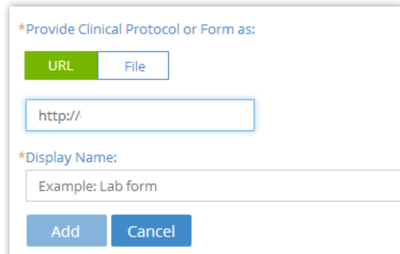


Figure 29: Add URL clinical protocol

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.

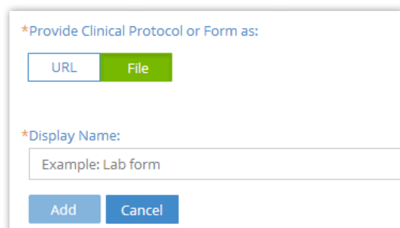


Figure 30: Add file clinical protocol

* 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.

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.

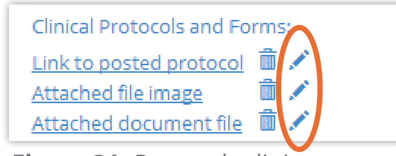


Figure 31: Protocol edit icons

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.

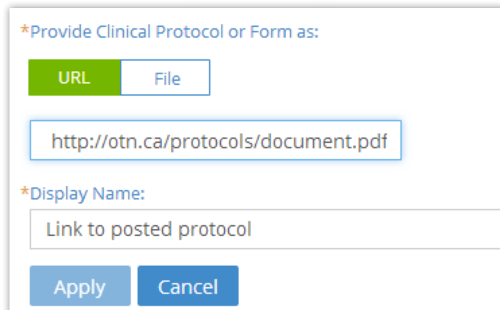


Figure 32: Edit protocol URL fields

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.

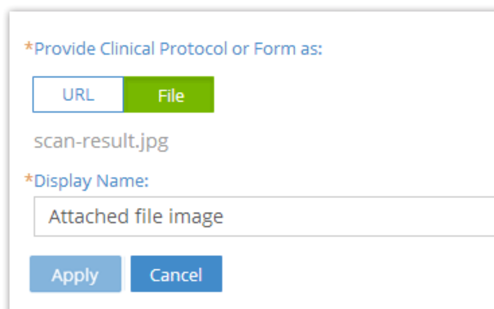


Figure 33: Edit protocol file fields

* 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.

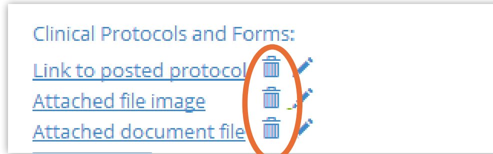


Figure 34: Protocol delete icons