

Updating a 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 biannual basis (every 6 months) to ensure the information is current. It should also be reviewed anytime there's changes to staff, rooms, programs, procedures, policies, or hours of operation.

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](#).
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.

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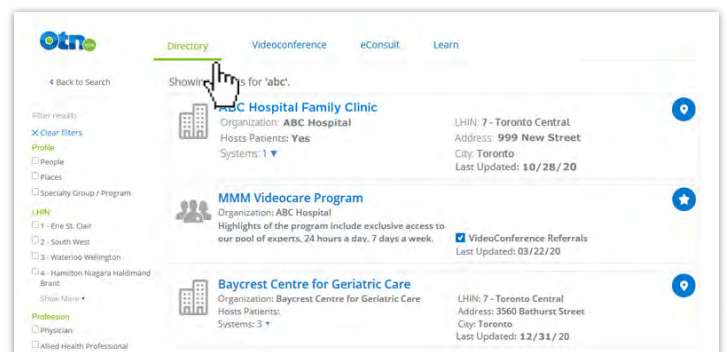


Figure 1: Directory search results



Figure 3: Site search results with systems displayed

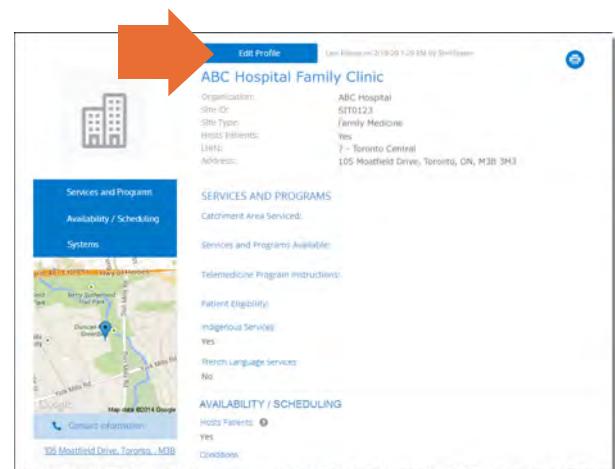


Figure 2: Site profile details

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.

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.

The screenshot shows a web form titled "ABC Hospital Family Clinic". At the top, there are two buttons: "Save" and "Cancel". Below the title, there is a table of information:

| | |
|-----------------|---|
| 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 |

Below this table is a section titled "SERVICES AND PROGRAMS". It contains three sub-sections, each with a text input field:

- Catchment Area Served:** Enter LHIN, Region/District or specific sites that are applicable
- Services and Programs Available:** (Empty text field)
- Telemedicine Program Instructions:** Indicate instructions for patient.

Figure 4: 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 these fields, 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. 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.)



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

| Field Name | Description |
|-----------------------------------|---|
| Services and Programs | |
| 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 | 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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The screenshot shows a web form for editing a site profile for 'ABC Hospital Family Clinic'. At the top, there are 'Save' and 'Cancel' buttons. Below the title, the following information is displayed: Organization: ABC Hospital, Site ID: SIT0123, Site Type: Family Medicine, Hosts Patients: Yes, LHI#: 7 - Toronto Central, Address: 105 Moatfield Drive, Toronto, ON, M3B 3M3. The 'SERVICES AND PROGRAMS' section includes three input fields: 'Catchment Area Served' with a placeholder 'Enter LHI#, Region/District or specific sites that are applicable', 'Services and Programs Available' (empty), and 'Telemedicine Program Instructions' with a placeholder 'Indicate instructions for patient...'.

Figure 5: Edit site profile form

| Field Name | Description |
|----------------------------------|---|
| Availability / Scheduling | |
| Hosts Patients | <p>Select the option that best describes the site's status 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 identify each system that can host patients using its system Usage field.</p> <p>Yes: Site can host any/all patients.</p> <p>Conditional: Hosts patients, but limited by certain conditions (e.g., geography, specialty, etc.). If selected, describe the conditions in the Conditions field.</p> <p>Closed: Temporarily unable to host patients. If you have identified your site as closed, you need to identify which systems normally host patients.</p> <p>No: Does not host patients.</p> |
| Conditions | 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.) |
| Site Availability | 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. |
| 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 | 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". |
| 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"> • 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. <p>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 .</p> |

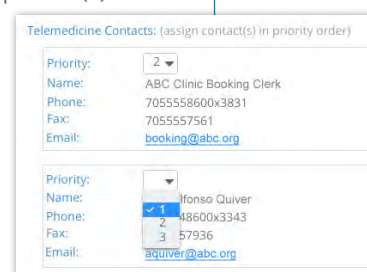
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| Field Name | Description |
|------------------------------------|--|
| Healthcare Professionals Available | Identifies whether Nursing Support is available with one or more of the site's systems. This field must also be identified at the system level . |
| 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 . |
| 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 events the site can host and whether the system can host patients: Hosts Patients 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 site Hosts Patients field (in the site details) — to show if the system can host any and all patients or has conditions for hosting. 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. |

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

| Field Name | Description |
|---|---|
| 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 . |
| Accessibility | Select which types of accessibility the system offers. |
| Telemedicine Contacts ^N (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 ContactUpdates@otn.ca.</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"> For each TMC, click the Priority drop-down arrow and select the desired number. You must assign a priority for all TMCs under the system. |
| Contact Information | |
| 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> |



^N 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.

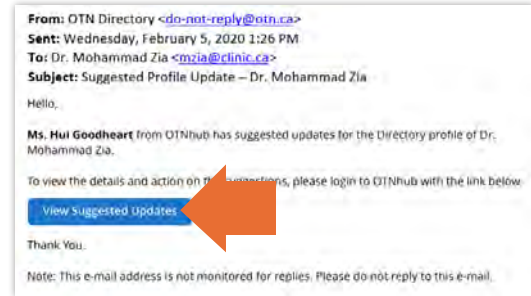


Figure 6: Email from 'suggest an update' feature

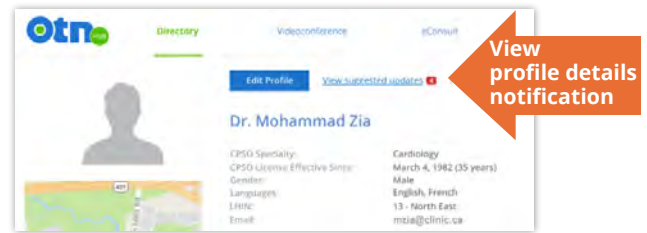


Figure 7: Profile with 'suggested updates' indicator

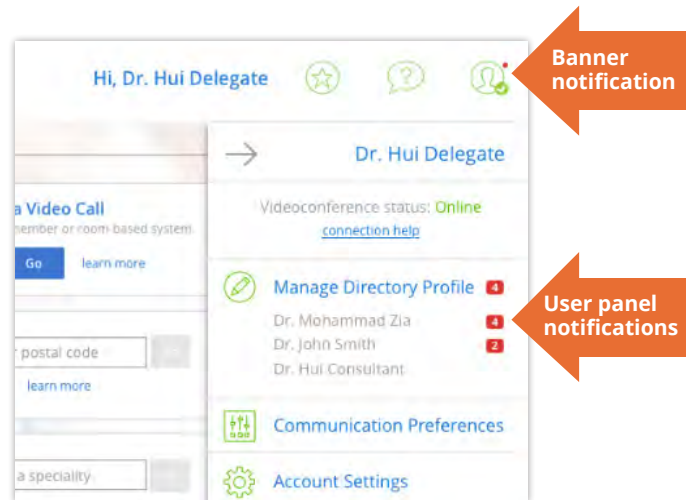


Figure 8: Banner and user panel (with delegates) showing 'suggested updates' indicators

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".

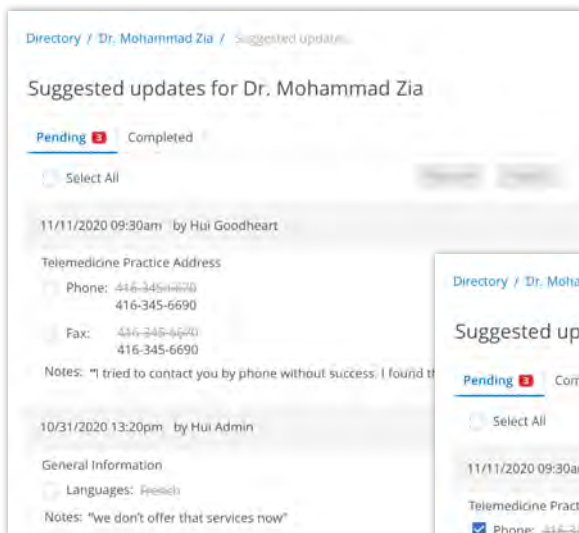


Figure 9: Pending suggested updates

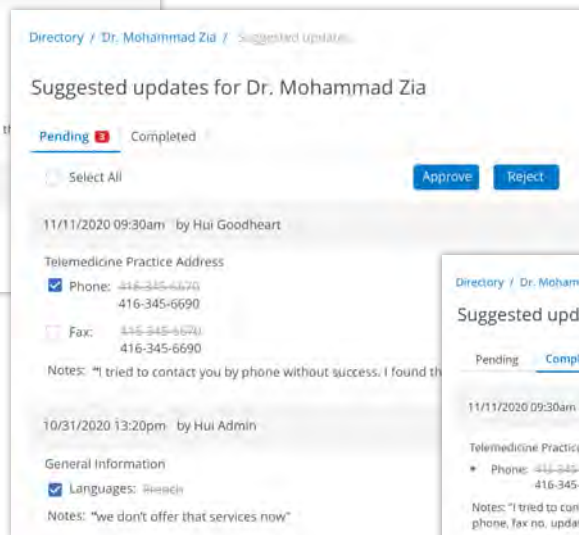


Figure 10: Selected pending suggested updates

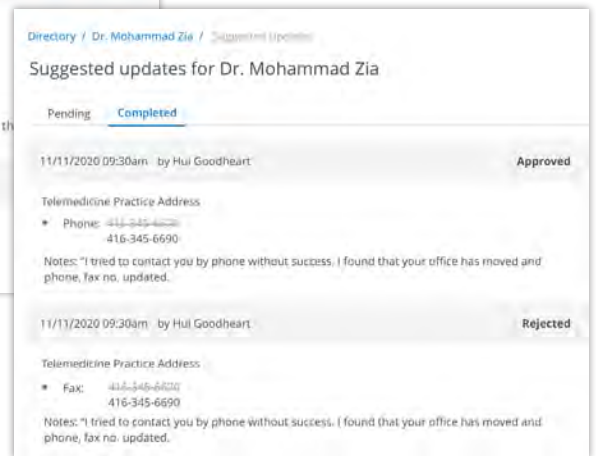


Figure 11: Completed suggested updates

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.

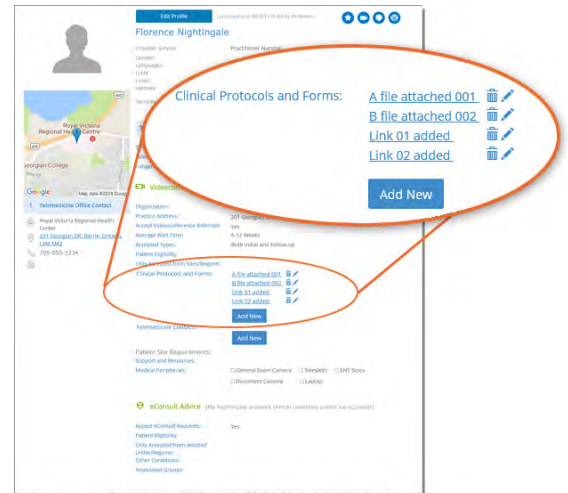


Figure 12: Clinical protocols section with edit permissions

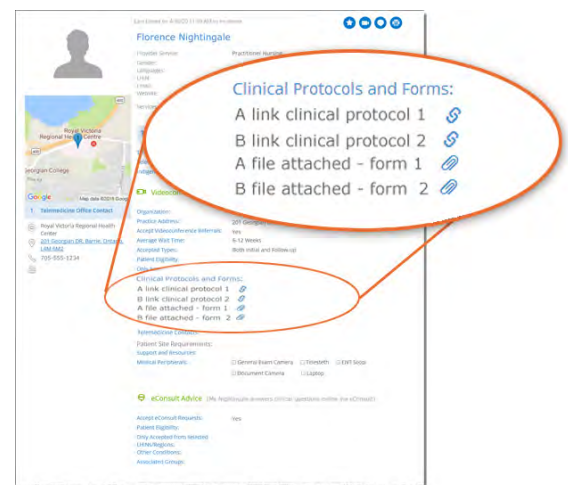



Figure 13: Clinical protocols section with no edit permissions

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.

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.

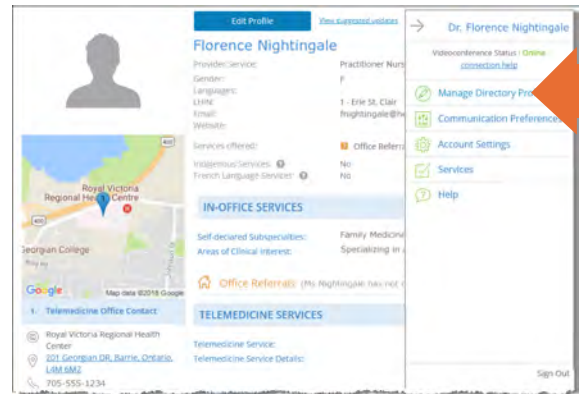


Figure 14: Change from edit mode to view mode for your own profile

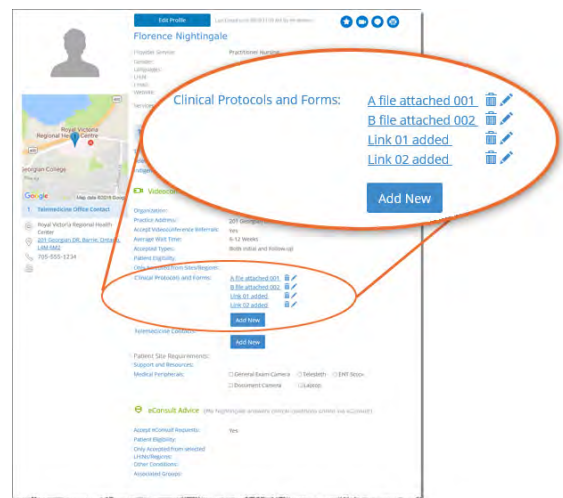


Figure 15: Protocols section in View Profile Details

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.

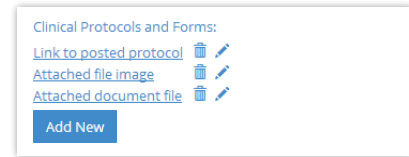


Figure 16: Clinical protocols

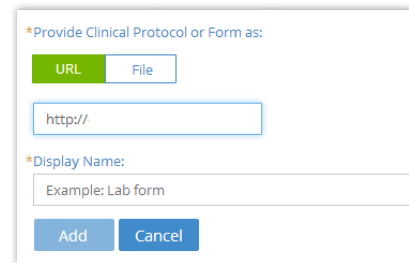


Figure 17: Add URL clinical protocol

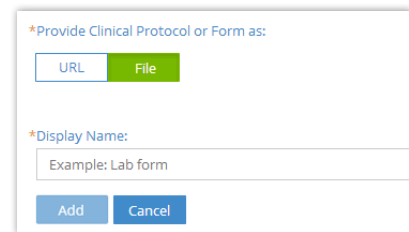


Figure 18: Add file clinical protocol

* 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.

To edit a URL link:

1. Change the URL or **Display Name** as desired.
2. To apply the update, click .
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 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 button.
3. To change the **Display Name** field, type an updated name and then click .

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.

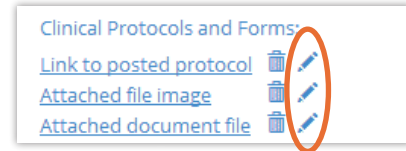


Figure 19: Protocol edit icons

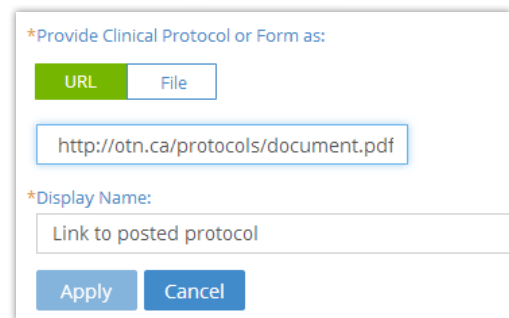


Figure 20: Edit protocol URL fields

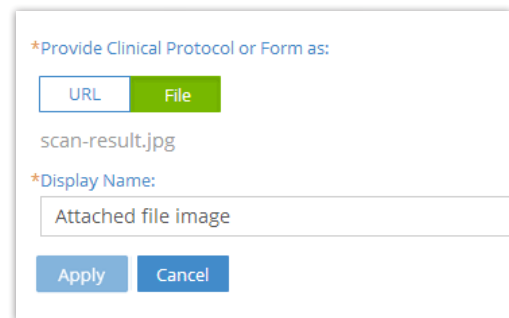



Figure 21: Edit protocol file fields

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 . 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 .

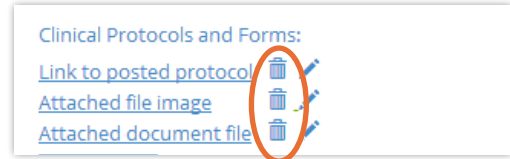


Figure 22: Protocol delete icons