A group is made up of specialists who share an 'assigner'.

- If the group is set up for **manual** assignment, the assigner receives eConsult cases and distributes them to specific specialists within the group.

- If the group is set up for **automatic** assignment, eConsult automatically assigns cases based on each specialist's preferences. This includes availability, case restrictions, pending cases, and cases assigned in the last 30 days.

After a profile is published, it is available in the following ways:

- When an eConsult user searches for a specialist, group, or program.

- When an OTNhub user searches the Directory.

A program is a structured form of clinical interaction within a health care environment, which has:

- Specific goals and is evaluated against those objectives on a regular basis.
- Defined guidelines and criteria for referrals and cases.
- Defined criteria for patient eligibility.
- The staff have well-defined and clearly differentiated roles and responsibilities.

Programs can offer different varieties of care. They can:

- Leverage one or more virtual care applications.
- Be independent of virtual care services and offer only face-to-face care.
- Accept referrals sent directly to the physicians in the program or via a central office.

There are four broad types of program:

- Ministry created Regional Programs and their Sub-divisions
- Hospital or Health Care Organization led Programs
- Voluntary groups of like skilled professionals who offer similar types of professional services
- Community Service Programs
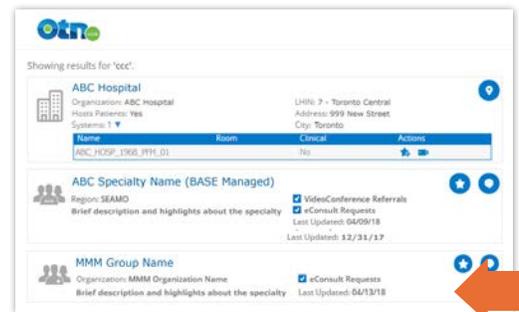
Table of Contents
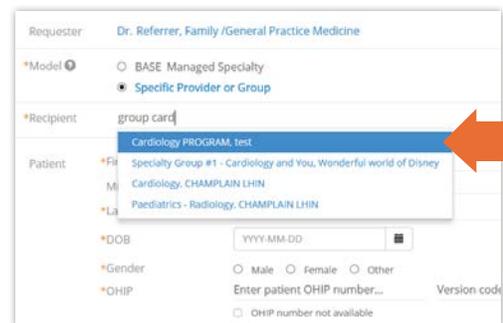
Figure 1: Group listed in Directory search

Figure 2: Group listed in recipient field suggestions

If you need administrative permissions to edit a profile, contact your organization's OTN Primary Contact or your OTN Account Manager.

For further assistance and technical support, contact OTN Technical Support

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

Creating a Group/Program 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 ⊕ beside the **Groups** or **Programs** title in the panel.

   The **Create Group/Program** form appears.

3. To define your group/program, fill in the fields with the relevant information. Fields marked with an asterisk (*) are required. For more information, see Group/Program Fields on page 3.

4. To continue, click [Save and Publish].

   A confirmation dialog box appears.

5. To save and publish the group profile, click [Publish].

   OTN Directory does the following:
   • Saves and publishes the profile. (It will appear in search results when an OTNhub user searches the Directory or an eConsult user searches for a specialist, group, or program.)
   • Briefly displays a success message.
   • Sends an email notification to all specialists who have been added to or removed from the group/program.
   • Displays the group/program's OTN Directory profile page.

6. If you change your mind and do not want to create the new group, click [Cancel].

   OTN Directory does the following:
   • Closes the form **without saving**.
   • Returns you to the location you were at before you started to create the profile.

7. If you want to save it as a draft (so you can return and finish later), click [Save as Draft].

   OTN Directory does the following:
   • Saves the profile details, flags it as 'Draft' and the profile is only available to you (or your delegates).
   • Briefly displays a success message.
   • Displays the form in an 'Edit Profile' mode and the process becomes the same as editing an unpublished profile. (See Editing a Profile on page 8.)
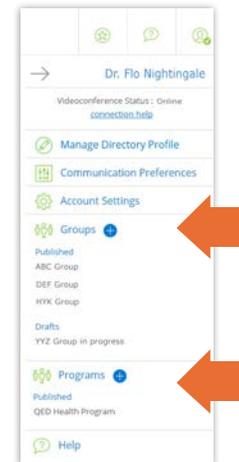

Figure 3: User panel menu
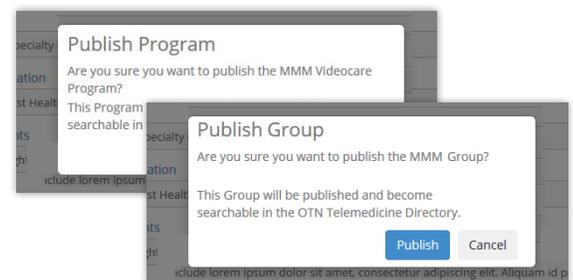

Figure 4: Create group form

Figure 5: Confirm publication dialog box

Group/Program Fields

Field (in order of appearance)	Description
Group/Program Information	
*Name	Type a unique and meaningful name, exactly how you want it to appear (including capitalization). For example, ABC DermaPerm Clinic.
*Organization	Type the proper, legal name of the organization to which the program/specialists belong. Ensure the name matches exactly (including capitalization).
*Highlights	Type a brief, one sentence description of the group/program.
Overview	
*Description	Type a more detailed description of the group. This could include the sub-specialties served and the special equipment and diagnostics the group offers.
Indigenous Services	Defaults to 'No'. **Only OTN can edit this field**. When set to 'Yes', it lets First Nations/Metis communities know they can connect with these programs for services that consider the cultural sensitivities of their community. A group/program can apply to OTN to have their profile updated with this set to 'Yes'. See Indigenous Services FAQ 🔗.
French Language Services	Defaults to 'No'. If the group/program offers a full French experience (*i.e.*, not just a translator), select the 'Yes' option.
The Team	Type a description of the specialists who make up the group/program. For example, their qualifications, competencies, and what makes them experts in their field. This is similar to a web site's "About Us" section.
Participating Sites	Type the name(s) of all sites that belong to the group/program.

Continued next page...

Figure 6: Edit group/program profile form

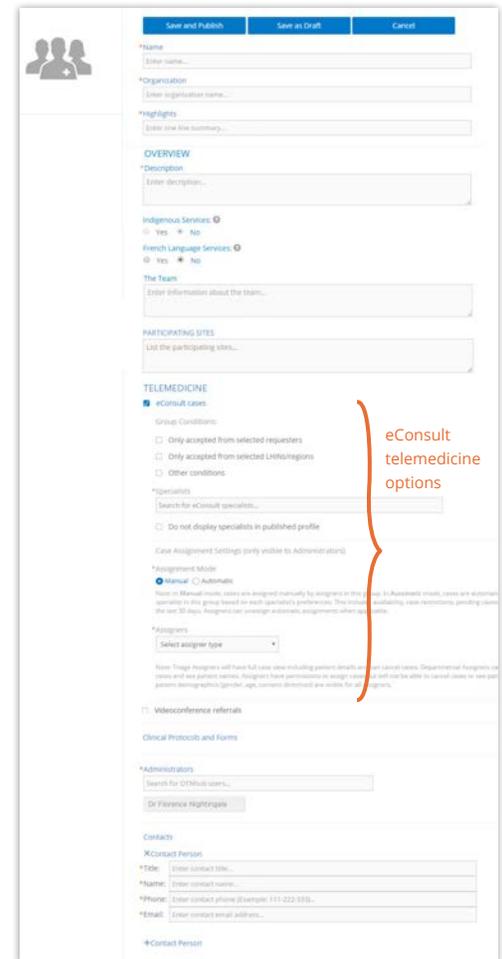| Field (in order of appearance)	Description
Telemedicine Options > **eConsult**	
eConsult cases	If the group will handle eConsult cases, click the ☑ eConsult cases checkbox. If the group **does not accept** eConsult cases, clear the eConsult cases checkbox.
Group Conditions	Identify whether the group/program unconditionally accepts all eConsult cases or it has conditions for accepting cases. By default, ☑ eConsult cases are **accepted unconditionally**. If the group/program **does not accept** eConsult cases, clear the eConsult cases check box. If the group/program **conditionally accepts** cases, select the appropriate check box and supply the condition(s). ☑ Only accepted from selected requesting providers. • Search for and select one or more eConsult requesters. ☑ Only accepted from selected LHINs/regions. • Type the LHIN or region name from which the group/program will accept eConsult cases. ☑ Other conditions. • Type a description of the conditions that affect which eConsult cases the group/program will accept.
*Specialists	Search for and select one or more specialists who belong to the group. To begin searching for a specialist, type at least two characters in the Specialist field. • As you type, the system displays a list of possible matching specialists. Click a name to select it. • The search results include only specialists that are registered for eConsult and accept eConsult cases. To remove a previously selected specialist from the list, click 🗑 beside their name. If you do not want the specialists names to be published in the group's Directory profile, select the checkbox, ☑ **Do not display specialists in published profile**. (When published, each specialist name is a link to their individual Directory profile.) If the specialist's profile is published or available as a draft profile, you can set conditions for the specialist. See .Editing eConsult Specialist's Settings on page 15.

Continued next page...

Figure 7: Edit program profile form

eConsult telemedicine options

Field (in order of appearance)	Description
Case Assignment Settings (visible only to Administrators)	
Assignment Mode	By default, **Manual** mode is selected and cases are assigned manually by assigners in the group.
	In **Automatic** mode, cases are automatically assigned to a specialist in the group based on each specialist's preferences. This includes availability, case restrictions, pending cases, and cases assigned in the last 30 days.
	Assigners can un-assign automatic assignments when applicable.
*Assigner Type	An Assigner reviews all the cases submitted to the group/program and then assigns each case to a specific specialist within the group/program.
	Identify whether the person is one of the following types.
	Note: Only assign "Triage Assigner" to clinicians who have access to pertinent Personal Health Information.

Actions Permitted	Basic Assigner	Department Assigner	Triage Assigner
Assign	✔	✔	✔
Un-assign	✔	✔	✔
Cancel	X	✔	✔
Re-Direct	✔	✔	✔
See patient demographics	conditional*	conditional*	✔
See patient name	X	conditional*	✔
See full case details	X	X	✔

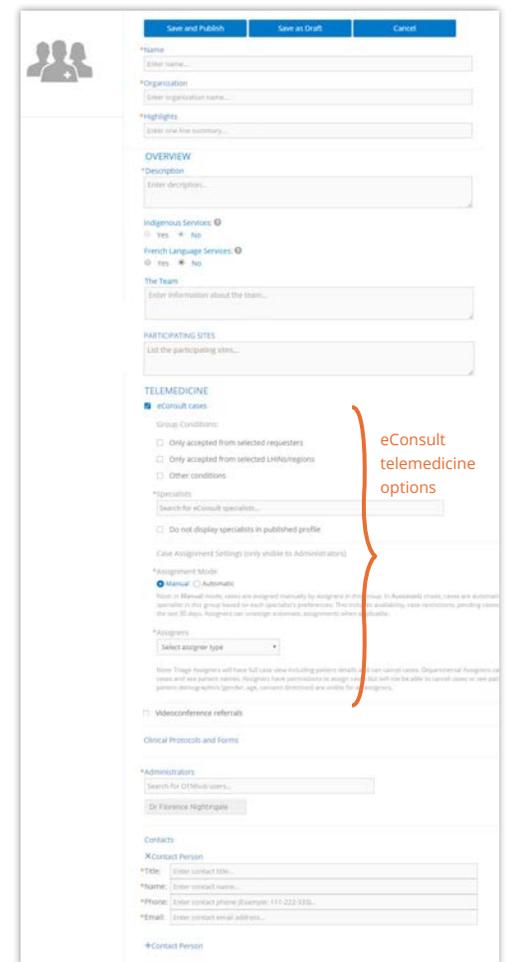| Field	Description
*Assigners	Search for and select one or more **eConsult users**.
	To begin searching for an assigner, type at least two characters in the Assigner field.
	As you type, the system displays a list of possible matching assigners. Click a name to select it.
	The selected assigners appear underneath the assigner search fields.
	Assigner contact information **is not published** in the group's Directory profile.
	To remove a previously selected person from the list, click the red **X** beside their name.

Continued next page…

eConsult telemedicine options

Figure 8: Edit program profile form

* Patient data appears only while the consult request has a status of "New Case Submitted" or "Needs Assignment".

Field (in order of appearance)	Description
Telemedicine Options > **Videoconference**	
Videoconference referrals	If the group will handle Videoconference referrals, click the ☑Videoconference referrals checkbox.
	If the group **does not accept** Videoconference referrals, clear the Videoconference referrals checkbox.
Conditions	Identify whether the group/program unconditionally accepts all videoconference referrals or it has some conditions.
	By default, ☑Videoconference referrals are **accepted unconditionally**.
	If the group/program **does not accept** Videoconference referrals, clear the Videoconference referrals check box.
	If the group/program **conditionally accepts** Videoconference referrals, select the appropriate check box and supply the condition(s).
	☑Only accepted from selected LHINs/regions.
	• Type the LHIN or regions from where Videoconference referrals are accepted.
	☑Other conditions.
	• Type a description of the conditions that affect which Videoconference referrals are accepted.
TMC Contacts	Click **+TMC Contact Admin** to add contact information for each **Telemedicine Coordinator** at the site.
	To display a set of contact fields, click **+TMC Contact Admin**.
	Type in the appropriate fields the name, phone number, and email address of the contact person.
	You can add more than one TMC contact for a group.
	To remove someone from the list, click the **XTMC Contact Admin** link for that contact.
Clinical Protocols and Forms	

Clinical protocols are procedural documents and forms for use by patient sites to help them properly prepare for and conduct a clinical session with 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 group/program's **View Profile Details** or **Edit Profile Details** page.

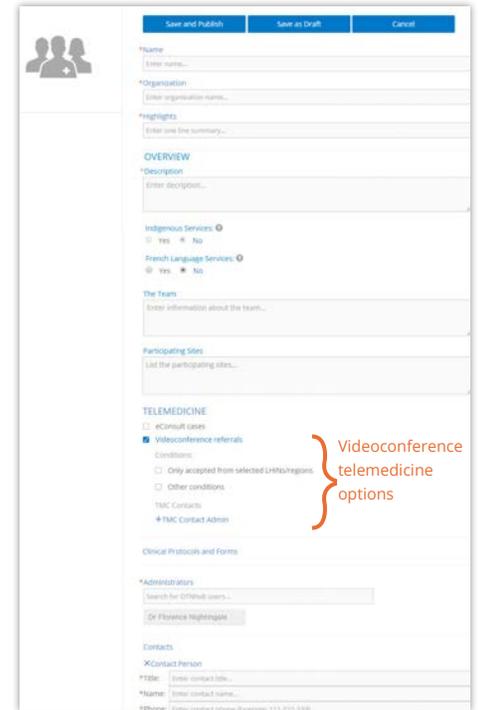See Managing Clinical Protocol Attachments and Links on page 11.

Figure 9: Edit program profile form

Continued next page...

Field (in order of appearance)	Description
Administrators and Contacts	
*Administrators	An Administrator is responsible for creating and maintaining the group/program's Directory profile. The person creating the group/program profile is automatically assigned as an administrator but additional administrators can be added.
	Search for and select one or more **OTNhub users**.
	• As you type, the system displays a list of possible matching OTNhub users. Click a name to select it.
	• The selected administrators appear underneath the administrator search field.
	Each selected person's name, phone number, and email **will be published** in the group/program's Directory profile.
	To remove a previously selected person from the list, click the red **X** beside their name.
Contacts	A Contact is someone who can answer questions or concerns about the group/program and its services.
	To display a set of Contact fields, click **+Contact Person**.
	Type in the appropriate fields the name, phone number, and email address of the contact person.
	You can add more than one contacts for a group/program.
	Each contact's name, phone number, and email **will be published** in the group/program's Directory profile.
	To remove someone from the list, click the **XContact Person** link for that contact.

Editing a Profile

The options available when you edit a group/program's profile depend on whether the profile is published and if you have administrative permissions.

- When you edit a **published** profile, you can update the profile and then save the changes or cancel without saving.

- When you edit an **unpublished or draft** profile, you can update the profile and then save and publish the changes or save the profile as a draft or close without saving or delete the profile.

1. Sign in at otnhub.ca ⧉, click the **User Panel** link (⧉) in the top right banner.

   A **User/Self-Service** panel appears.

2. Locate the **Groups** or **Programs** section in the panel and click the desired group/program name.

   The group's **Directory Profile** appears. If you have editing permissions, an ⟨ Edit ⟩ button appears at the top of the profile.

3. To access the **Edit Profile** form, click ⟨ Edit ⟩.

   The Edit Group/Program form appears.

4. Change or add information as necessary. (For field descriptions, see Group/Program Fields on page 3.)

5. To save an updated published profile, click ⟨ Save ⟩ (or if it is an unpublished or draft profile, click ⟨ Save and Publish ⟩).

   OTN Directory does the following:

   - Saves (and if selected, publishes) the updated profile.

   - Briefly displays a success message.

   - Sends an email notification to all specialists who have been added to or removed from the group/program.

   - Displays the group's OTN Directory profile page.

6. If you change your mind and do not want to make any changes:

   a) Click ⟨ Cancel ⟩ (or if it is an unpublished or draft profile, click ⟨ Close ⟩).

      A confirmation dialog box appears.

   b) To confirm your decision to navigate away without saving, click ⟨ OK ⟩.

      OTN Directory does the following:

      - Closes the form without saving.

      - Returns you to the Directory profile page.

3. If it is an unpublished or draft profile and you want to save it as a draft, click ⟨ Save as Draft ⟩.

   OTN Directory does the following:

   - Saves the profile details, flags it as 'Draft' and the profile is only available to you (or your delegates).

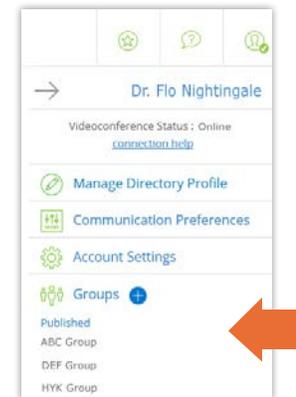   - Briefly displays a success message.
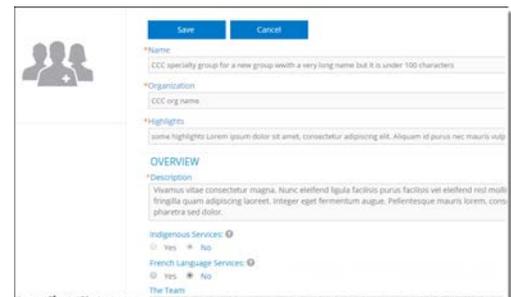
Figure 10: User panel menu

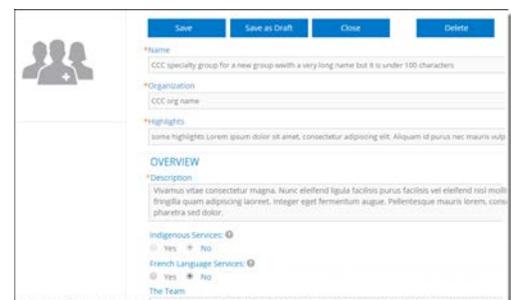**Figure 11:** Edit published group/program form

Figure 12: Edit unpublished or draft group/program form

Un-publishing a Profile

When you un-publish a group/program profile it is immediately removed from the Directory searches and eConsult specialist searches.

An unpublished profile appears as a 'draft' in the My Group/Programs list.

1. Sign in at otnhub.ca ⧉, click the **User Panel** link (ⓠ)
    in the top right banner.

    A **User/Self-Service** panel appears.

2. Locate the **Groups** or **Programs** section in the panel
    and click the desired group/program name.

    The group/program's **Directory Profile** appears. If you
    have editing permissions, an Unpublish button appears
    at the top of the profile.

3. To begin the process, click Unpublish .

    A confirmation dialog box appears.

4. To confirm, click Unpublish .

    OTN Directory does the following:

    • Removes the profile from the public directory.

    • Briefly displays a success message.

    • The Edit Unpublished Group/Program form
      appears, populated with all of the information from
      the original profile.

At this point, the process is the same as editing an
unpublished profile. (See Editing a Profile on page 8 or
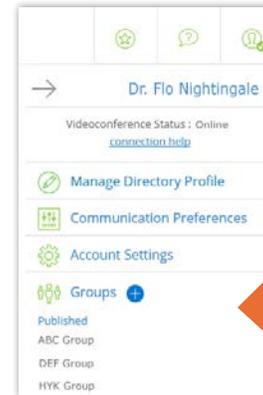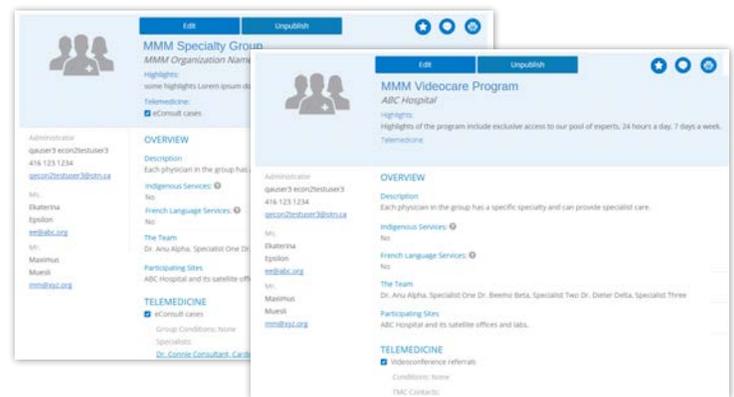Deleting a Profile on page 10.)

Figure 13: User panel menu

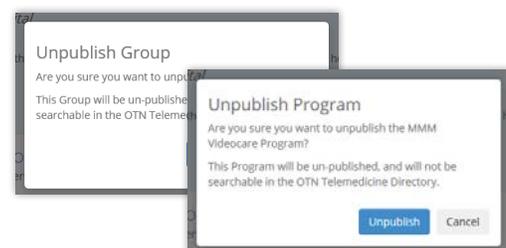**Figure 14:** Published group/program profiles

Figure 15: Confirmation dialog box

Deleting a Profile

You can delete only unpublished or draft group/program profiles.

If you want to delete a published profile, you must first un-publish it and then delete it. (See Un-publishing a Profile on page 9.)

You cannot delete a group/program profile if there are open cases submitted to the group/program.

1. Sign in at otnhub.ca ⧉, click the **User Panel** link (ⓠ)
    in the top right banner.

    A **User/Self-Service** panel appears.

2. Locate the **Groups** or **Programs** section in the panel and click the desired group/program name. (It should be in the "Drafts" list. If not, you need to first un-publish it.)

    The group/program's **Directory Profile** appears. If you have editing permissions, an [Edit] button appears at the top of the profile.

3. To access additional actions for the profile, click [Edit].

    The Edit Group/Program form appears with four action buttons at the top of the form—Save and Publish, Save as Draft, Close, and Delete. (**If you see only two buttons**— Save and Cancel, you need to un-publish the profile before editing it.)

4. To begin the delete process, click [Delete].

    A confirmation dialog box appears.

5. To confirm the deletion, click [Delete].

    OTN Directory does the following:

    • Deletes the profile completely.

    • Briefly displays a success message.

    • Sends an email notification to all specialists who were a part of the group/program.

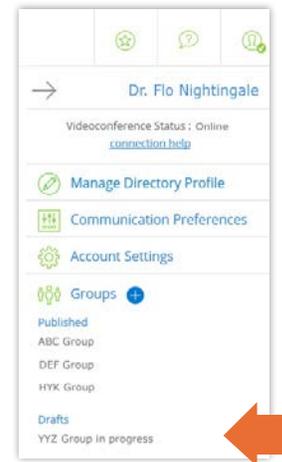   • Displays the eConsult dashboard.
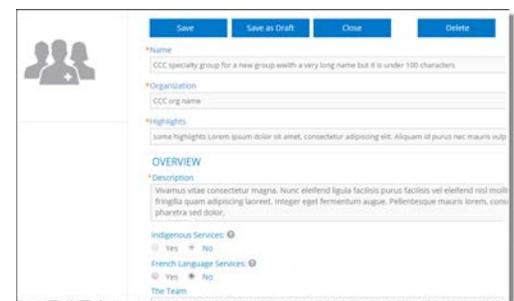

Figure 16: User pane menu

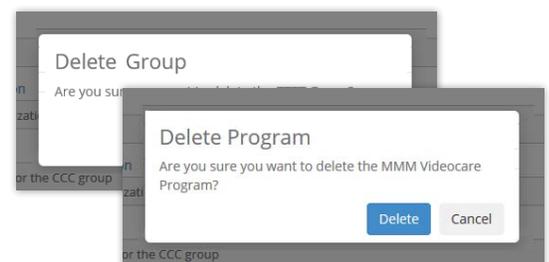**Figure 17:** Edit unpublished or draft group/program profile

Figure 18: Confirm deletion dialog box

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 properly prepare for and conduct the session.

A group/program might have general protocols but can also have protocols that apply to specific specialists within the group.

If the group/program 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.

Accessing Clinical Protocols Fields

Clinical protocols are accessible on the **View Profile Details** page.

1. Sign in at <u>otnhub.ca</u> ⧉ and go to the **Directory** service.

2. <u>Search for the group/program</u> ⧉ and locate their name in the results list and click the name to display the <u>profile details</u> ⧉.
   The **Profile Details** screen appears.

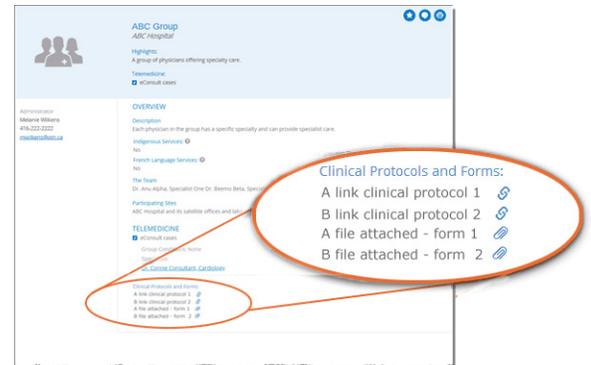3. Scroll down to the **Clinical Protocols and Forms** section.

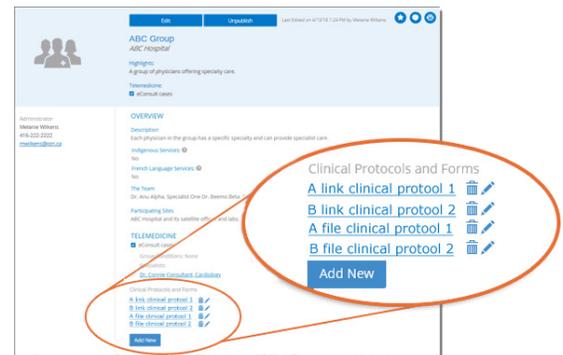**Figure 19:** Clinical protocols section with no edit permissions

Figure 20: Clinical protocols section with edit permissions

Adding a File or Link

1. <u>Access the clinical protocols section</u> of a profile.

2. 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
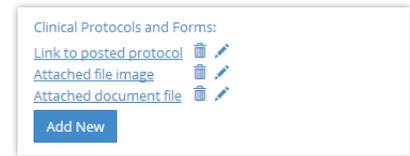success message briefly appears.

Figure 21: Clinical protocols

Figure 22: Add URL clinical protocol

Figure 23: 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.

Access the clinical protocols section of a profile and click the **Edit** icon (✏) beside a listed item.

Figure 24: Protocol edit icons

> 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 25: 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.
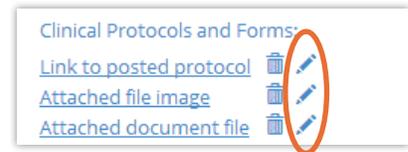

Figure 26: Edit protocol file fields

* 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 clinical 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 .

Clinical Protocols and Forms:

Link to posted protocol 🗑 ✏
Attached file image 🗑 ✏
Attached document file 🗑 ✏

Figure 27: Protocol delete icons

Editing eConsult Specialist's Settings

A group's administrator can edit a specialist's eConsult settings after the group's profile is published or saved as a draft.

To view the Specialist Settings pop-up:

1. Open the group's Edit Profile web page and
    go to the **Telemedicine > eConsult cases** section.

2. Locate the specialist you want to update
    and click the corresponding ⚙ **Settings** link.

3. In the **Specialist Settings** pop-up, make the desired changes
    and then click Save .

    • The changes are immediately applied to the specialist's eConsult settings. (You do not need to save the profile.)

    • A success message briefly appears.

    • When the *unavailable dates* or *maximum cases* are updated, the specialist is sent an email notifying them of the change.

    • When s*pecialist conditions* (patient age groups or selected regions) are updated, the specialist is not notified.

For detailed descriptions and instructions for these fields, see Setting eConsult Service Options 🗗.

Availability (unavailable dates)

Identifies when the specialist will be unavailable for a period of time, you can set an out-of-office notification.

When a requester searches for a recipient, if a specialist included in the search results is unavailable, their name appears with a red colour along with the return-to-office date.

• Value initially inherited from the specialist's eConsult settings.

• Can be edited only when the profile is published.

Maximum Cases

Identifies if a specialist will accept only a limited number of eConsult cases within a week. A week being defined as a seven day rolling count.

• Value initially inherited from the specialist's eConsult settings.

• Can be edited only when the profile is published.

Specialist Conditions

Identifies other conditions that affect eConsult requests for the specialist, including age group and regional restrictions.

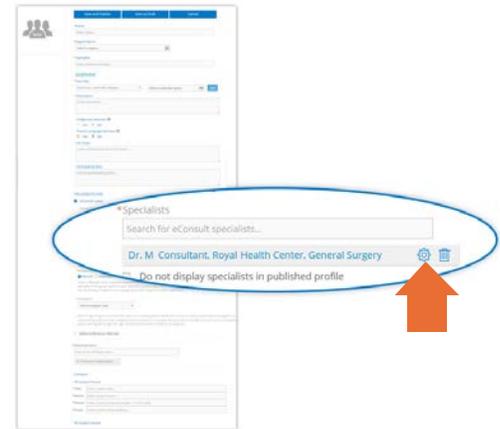• Can be edited when the profile is published or in a draft state.

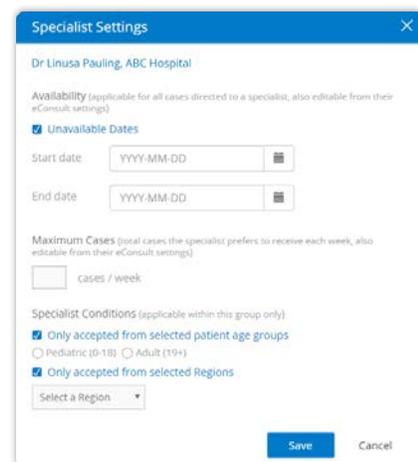**Figure 28:** Specialist section in profile

Figure 29: Specialist settings pop-up