

A group is made up of specialists who share an ‘assigner’. This assigner manages consultation requests (e.g., eConsult cases) and distributing them to specific specialists within the group.

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 healthcare 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 telemedicine applications to deliver patient care.
- Be independent of telemedicine 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 Healthcare Organization led Programs
- Voluntary groups of like skilled professionals who offer similar types of professional services
- Community Service Programs

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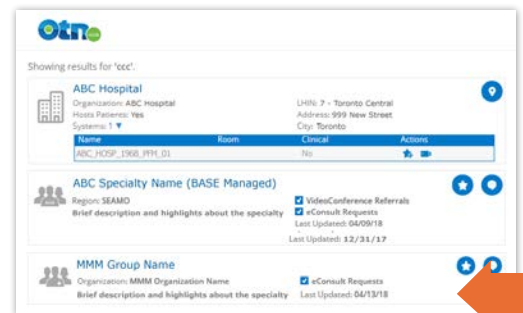


Figure 1: Group listed in Directory search

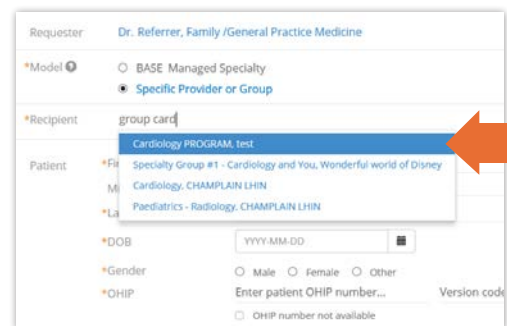


Figure 2: Group listed in recipient field suggestions



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 (Figure 4).
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 (Figure 5).
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 7.)

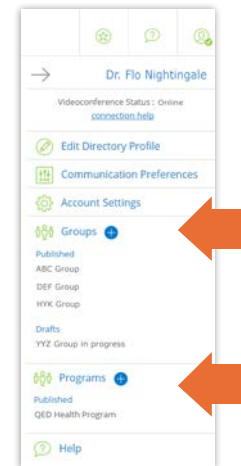


Figure 3: User panel menu

Figure 4: Create group form

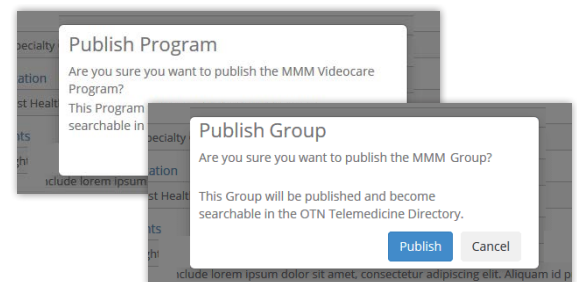


Figure 5: Confirm publication dialog box

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.
*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.
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.
Telemedicine Options > eConsult	
eConsult cases	Identify whether the group/program unconditionally accepts all eConsult cases or it has conditions for accepting cases. By default, <input checked="" type="checkbox"/> 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). <input checked="" type="checkbox"/> Only accepted from selected requesting providers. <ul style="list-style-type: none"> Search for and select one or more eConsult requesters. (See 'Specialist field instructions' on page 4.) <input checked="" type="checkbox"/> Only accepted from selected LHINs/regions. <ul style="list-style-type: none"> Type the LHIN or region name from which the group/program will accept eConsult cases. <input checked="" type="checkbox"/> Other conditions. <ul style="list-style-type: none"> Type a description of the conditions that affect which eConsult cases the group/program will accept.

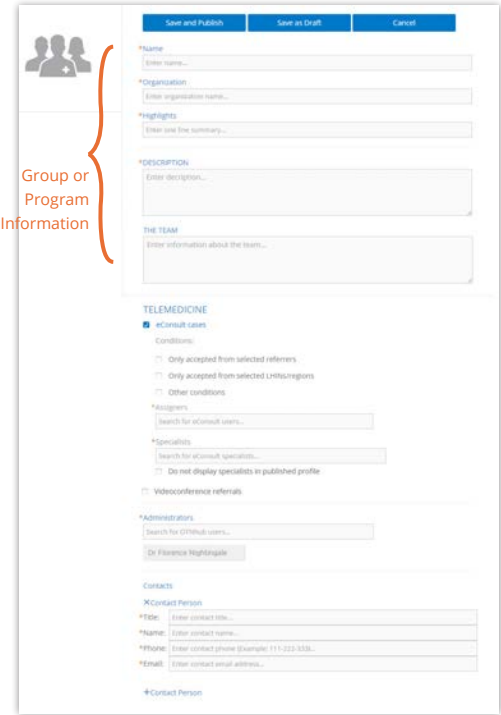


Figure 6: Edit group/program profile form

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Field (in order of appearance)	Description																												
*Assigner Type	<p>An Assigner reviews all the cases submitted to the group/program and then assigns each case to a specific specialist within the group/program.</p> <p>Identify whether the person is one of the following types.</p> <p>Note: Only assign "Triage Assigner" to clinicians who have access to pertinent Personal Health Information.</p> <table border="1"> <thead> <tr> <th>Actions Permitted</th> <th>Basic Assigner</th> <th>Department Assigner</th> <th>Triage Assigner</th> </tr> </thead> <tbody> <tr> <td>Assign</td> <td>✓</td> <td>✓</td> <td>✓</td> </tr> <tr> <td>Un-assign</td> <td>✓</td> <td>✓</td> <td>✓</td> </tr> <tr> <td>Cancel</td> <td>X</td> <td>✓</td> <td>✓</td> </tr> <tr> <td>See patient demographics</td> <td>✓</td> <td>✓</td> <td>✓</td> </tr> <tr> <td>See patient name</td> <td>X</td> <td>✓</td> <td>✓</td> </tr> <tr> <td>See full case details</td> <td>X</td> <td>X</td> <td>✓</td> </tr> </tbody> </table>	Actions Permitted	Basic Assigner	Department Assigner	Triage Assigner	Assign	✓	✓	✓	Un-assign	✓	✓	✓	Cancel	X	✓	✓	See patient demographics	✓	✓	✓	See patient name	X	✓	✓	See full case details	X	X	✓
Actions Permitted	Basic Assigner	Department Assigner	Triage Assigner																										
Assign	✓	✓	✓																										
Un-assign	✓	✓	✓																										
Cancel	X	✓	✓																										
See patient demographics	✓	✓	✓																										
See patient name	X	✓	✓																										
See full case details	X	X	✓																										
*Assigners	<p>Search for and select one or more eConsult users. (See 'Specialist' field instructions below.)</p> <p>Assigner contact information is not published in the group's Directory profile.</p> <p>To remove a previously selected person from the list, click the red X beside their name.</p>																												
*Specialists	<p>Search for and select one or more specialists who belong to the group/program.</p> <p>To begin searching for a specialist, type at least two characters in the Specialist field.</p> <ul style="list-style-type: none"> As you type, the system displays a list of possible matching specialists. The search results include only specialists that are registered for eConsult and accept eConsult cases. <p>To remove a previously selected specialist from the list, click the red X beside their name.</p> <p>If you do not want the specialists names to be published in the group/program's Directory profile, select the checkbox, <input checked="" type="checkbox"/> Do not display specialists in published profile. (When published, each specialist name is a link to their individual Directory profile.)</p>																												

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The screenshot shows a web form for editing a program profile. At the top, there are three buttons: 'Save and Publish', 'Save as Draft', and 'Cancel'. Below these are several input fields: 'Name', 'Organization', 'Description', and 'THE TEAM'. A section titled 'TELEMEDICINE' contains several options: 'eConsult cases' (checked), 'Conditions' (with sub-options for accepted referrals and other conditions), 'Assigners' (with a search field), 'Specialists' (with a search field and a checkbox 'Do not display specialists in published profile'), 'Videoconference referrals', and 'Administrators' (with a search field). A red bracket on the right side of the form groups the 'TELEMEDICINE' options and is labeled 'Telemedicine Options for eConsult'. At the bottom, there is a 'CONTACTS' section with fields for 'CONTACT Person', 'TITLE', 'PHONE', and 'EMAIL'.

Figure 7: Edit program profile form



Field (in order of appearance)	Description
Telemedicine Options > Videoconference	
Videoconference referrals	<p>Identify whether the group/program unconditionally accepts all videoconference referrals or it has some conditions.</p> <p>By default, <input checked="" type="checkbox"/> Videoconference referrals are accepted unconditionally.</p> <p>If the group/program does not accept Videoconference referrals, clear the Videoconference referrals check box.</p> <p>If the group/program conditionally accepts Videoconference referrals, select the appropriate check box and supply the condition(s).</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Only accepted from selected LHINs/regions. <ul style="list-style-type: none"> Type the LHIN or regions from where Videoconference referrals are accepted. <input checked="" type="checkbox"/> Other conditions. <ul style="list-style-type: none"> 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. (See Contacts on the next page.)
Clinical Protocols and Forms	
<p>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.</p> <p>If you have documents that contain detailed clinical protocols or forms, you can:</p> <ul style="list-style-type: none"> 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. <p>You can add, delete or edit protocols from the group/program's View Profile Details or Edit Profile Details page.</p> <p>See Managing Clinical Protocol Attachments and Links on page 10.</p>	

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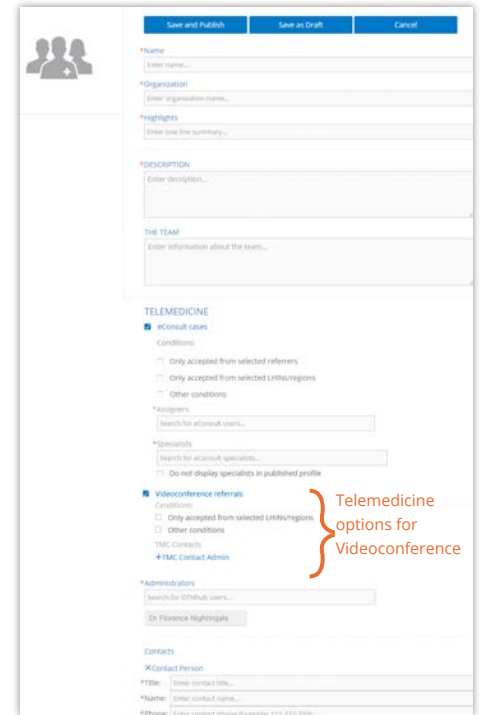



Figure 8: Edit program profile form



Field <small>(in order of appearance)</small>	Description
Administrators and Contacts	
*Administrators	<p>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.</p> <p>Search for and select one or more OTNhub users. (See 'Specialist' field instructions' on page 4.)</p> <p>Each selected person's name, phone number, and email will be published in the group/program's Directory profile.</p> <p>To remove a previously selected person from the list, click the red X beside their name.</p>
Contacts	<p>A Contact is someone who can answer questions or concerns about the group/program and its services.</p> <p>To display a set of Contact fields, click +Contact Person.</p> <p>Type in the appropriate fields the name, phone number, and email address of the contact person.</p> <p>You can add more than one contacts for a group/program.</p> <p>Each contact's name, phone number, and email will be published in the group/program's Directory profile.</p> <p>To remove someone from the list, click the XContact Person link for that contact.</p>
Indigenous Services	<p>Defaults to 'No'. Only OTN can edit this field.</p> <p>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.</p> <p>A group/program can apply to OTN to have their profile updated with this set to 'Yes'.</p> <p>See Indigenous Services FAQ .</p>



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.

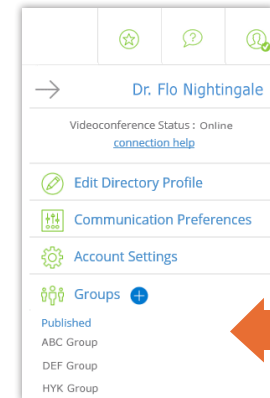


Figure 9: User panel menu

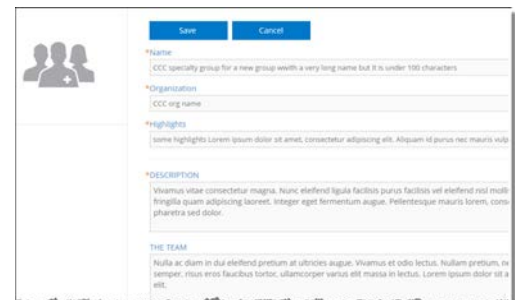


Figure 10: Edit published group/program form

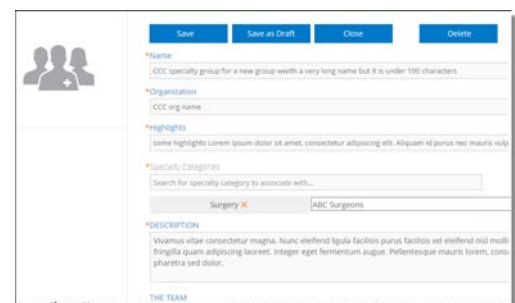


Figure 11: Edit unpublished or draft group/program form

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 (Figure 14).
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 7 or [Deleting a Profile](#) on page 9.)

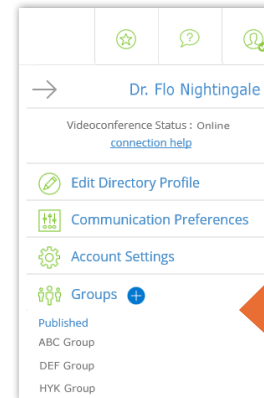


Figure 12: User panel menu

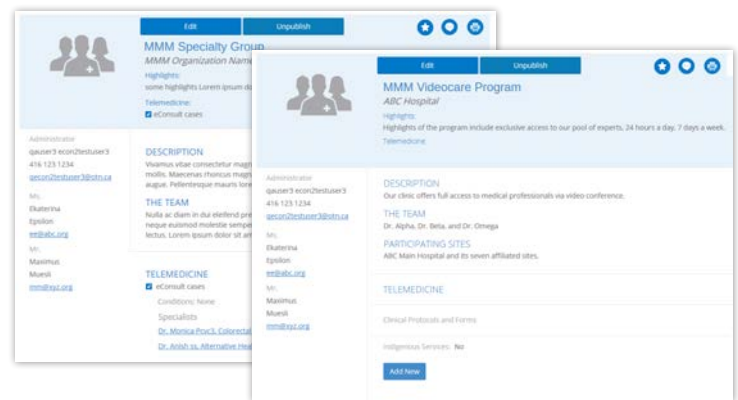


Figure 13: Published group/program profile

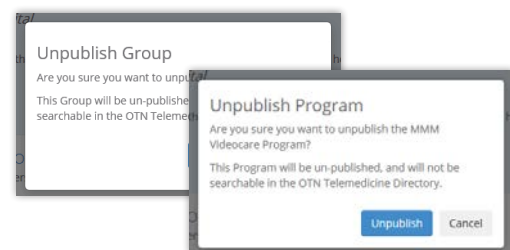


Figure 14: Confirmation dialog box

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 8.)

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 (Figure 17).

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.

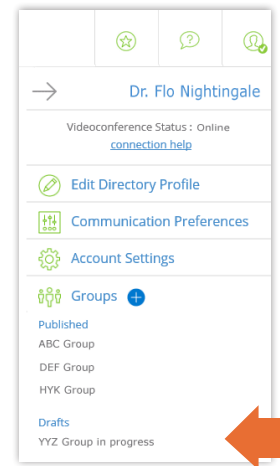


Figure 15: User pane menu

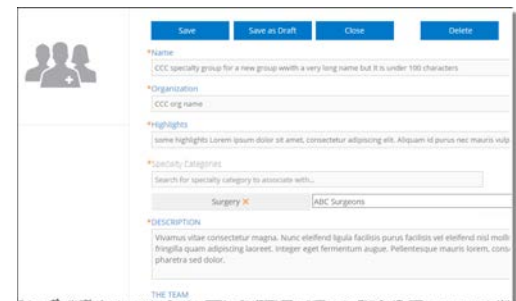


Figure 16: Edit unpublished or draft group/program profile

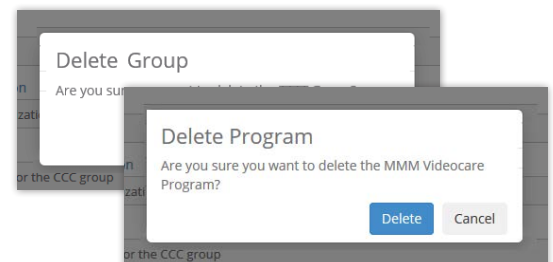


Figure 17: Confirm deletion dialog box

Managing Clinical Protocol Attachments and Links

Clinical protocols are procedural documents and forms provided by healthcare 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 telemedicine session. This in turn helps the healthcare 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 don't 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.

- Sign in at otnhub.ca and go to the **Directory** service.
- [Search for the group/program](#) and locate their name in the results list and click the name to display the [profile details](#). The **Profile Details** screen appears.
- Scroll down to the **Clinical Protocols and Forms** section.

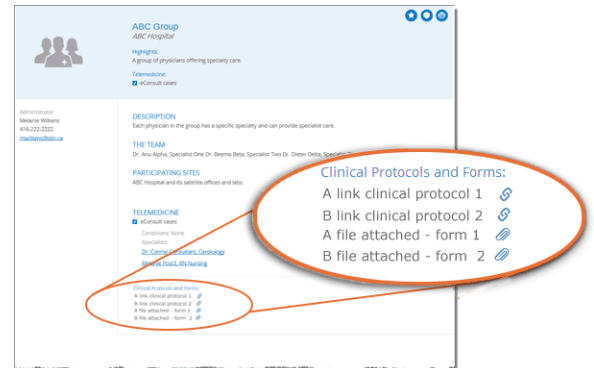


Figure 18: Clinical protocols section within View Profile Details with no edit permissions

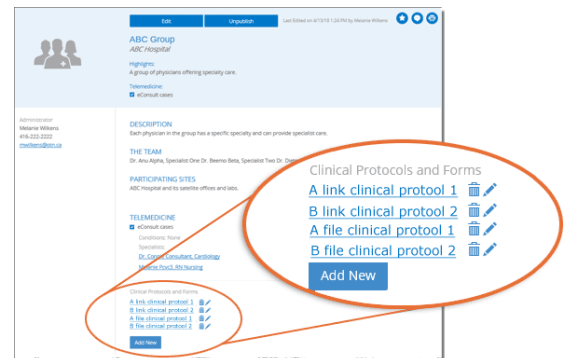


Figure 19: Clinical protocols section within Edit Profile and with edit permissions

Adding a File or Link

1. [Access the clinical protocols section](#) 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.

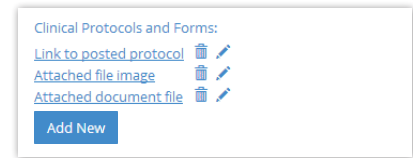


Figure 20: Clinical protocols

 A screenshot of a dialog box titled '*Provide Clinical Protocol or Form as:'. It has two radio buttons: 'URL' (selected) and 'File'. Below the radio buttons is a text input field containing 'http://'. Underneath is another section titled '*Display Name:' with a text input field containing 'Example: Lab form'. At the bottom are 'Add' and 'Cancel' buttons.

Figure 21: Add URL clinical protocol

 A screenshot of a dialog box titled '*Provide Clinical Protocol or Form as:'. It has two radio buttons: 'URL' and 'File' (selected). Below the radio buttons is a text input field containing 'Example: Lab form'. At the bottom are 'Add' and 'Cancel' buttons.

Figure 22: 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.

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.

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.

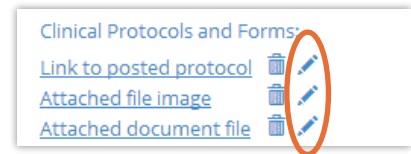


Figure 23: Protocol edit icons

Figure 24: Edit protocol URL fields

Figure 25: 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 26: Protocol delete icons