A BASE Managed Specialty Group is made up of a group of consultants who respond to eConsult cases for a given specialty or sub-specialty within a defined provincial region. These consultants have received privileges for completing eConsult cases.

When a requesting provider creates a BASE Managed Specialty Group request, they identify a therapeutic area of care (specialty and subspecialty option).

Based on this selection, eConsult automatically provides a specialty group within the **Region** nearest to the requestor's address (that is, nearest the address as published in the OTNhub Directory).

The group has an eConsult 'assigner'. This assigner manages consultation requests—receiving eConsult cases and distributing them to specific specialists within the group.

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

Table of Contents

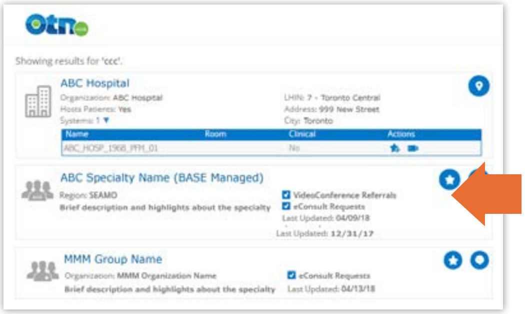

Figure 1: BASE Managed Specialty Group listed in Directory search

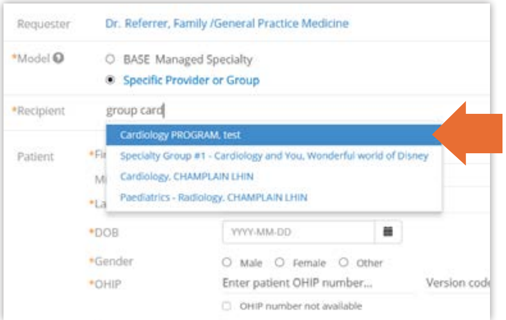

Figure 2: BASE Managed Specialty Group listed in recipient field suggestions

Creating a 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 **Managed Groups** title in the panel.

   The **Create BASE Managed Specialty Group** form appears.

3. To define your group, fill in the fields with the relevant information. Fields marked with an asterisk (*) are required. For more information, see BASE Managed Specialty Group 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 or group.)
   - Briefly displays a success message.
   - Sends an email notification to all specialists who have been added to or removed from the group.
   - Displays the group'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.)

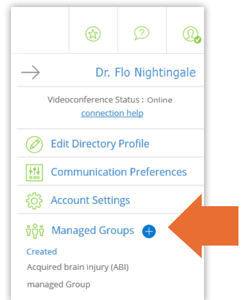

Figure 3: User panel menu

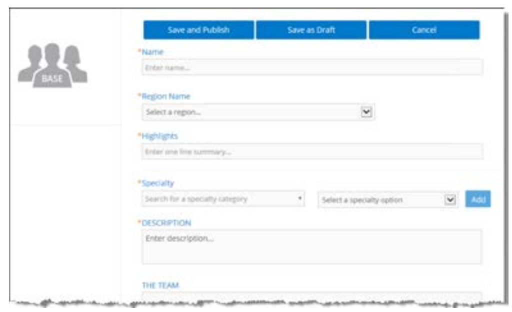

Figure 4: Create BASE Managed Specialty Group form

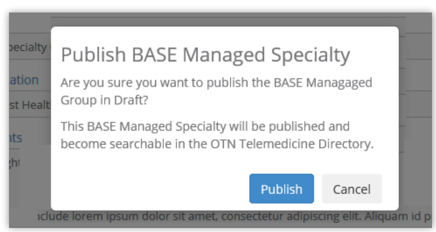

Figure 5: Confirm publication dialog box

BASE Managed Specialty Group Fields

Field (in order of appearance)	**Description**
Group Information	
*Name	Type a unique and meaningful name, exactly how you want it to appear (including capitalization). For example, ABC DermaPerm Clinic.
*Region	Select the region for which you want to accept requests. Note: The Region is not published in the OTN Directory. The list of available regions is maintained by OTN.
*Highlights	Type a brief, one sentence description of the group.
*Specialty Category & *Specialty Option	The two **Specialty** fields work together. i. In the Specialty **category** field, type a couple of letters to view a drop-down list of available categories and click an item in the list to select it. ii. In the Specialty **option** field, click the drop-down arrow and select an option from the list. iii. To complete your selection and add the specialty to the profile, click Add. The specialty/option selections appear in a shaded area under the field. (To remove the selected specialty, click the X in this shaded area.) Repeat the above steps for each specialty you want to include in the group.
*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. 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.

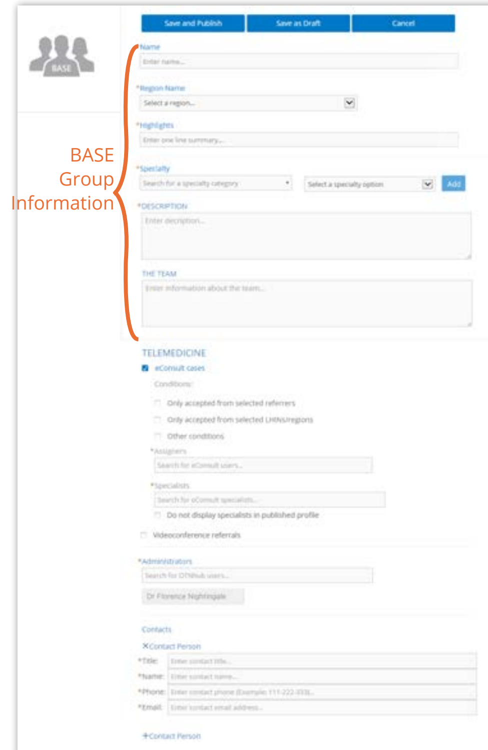

Figure 6: Edit group profile form

Continued next page…

<table>
<tr><th>Field (in order of appearance)</th><th>Description</th></tr>
<tr><td colspan="2">Telemedicine Options > eConsult</td></tr>
<tr><td>eConsult cases</td><td>
Identify whether the group unconditionally accepts all eConsult cases or it has conditions for accepting cases.
By default, ☑ eConsult cases are accepted unconditionally.
If the group does not accept eConsult cases, clear the eConsult cases check box.
If the group 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. (See 'Specialist' field instructions on page 5.)
☑ Only accepted from selected LHINs/regions.
Type the LHIN or region name from which the group will accept eConsult cases.
☑ Other conditions.
Type a description of the conditions that affect which eConsult cases the group will accept.
</td></tr>
<tr><td>*Assigner Type</td><td>
An Assigner reviews all the cases submitted to the group and then assigns each case to a specific specialist within the group.
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.
<table>
<tr><th>Actions Permitted</th><th>Basic Assigner</th><th>Department Assigner</th><th>Triage Assigner</th></tr>
<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>
</table>
</td></tr>
<tr><td>*Assigners</td><td>
Search for and select one or more eConsult users. (See 'Specialist' field instructions on the next page.)
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.
</td></tr>
</table>

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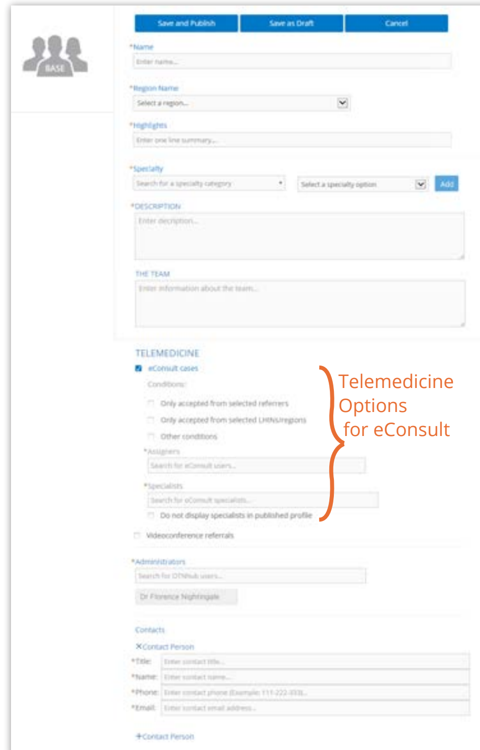

Figure 7: Edit group profile form

Field (in order of appearance)	**Description**
*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. • 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 the red **X** 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.)
Telemedicine Options > **Videoconference**	
Videoconference referrals	Identify whether the group unconditionally accepts all videoconference referrals or it has some conditions. By default, ☑ Videoconference referrals are **accepted unconditionally**. If the group **does not accept** Videoconference referrals, clear the Videoconference referrals check box. If the group **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. (See Contacts on the next page.)

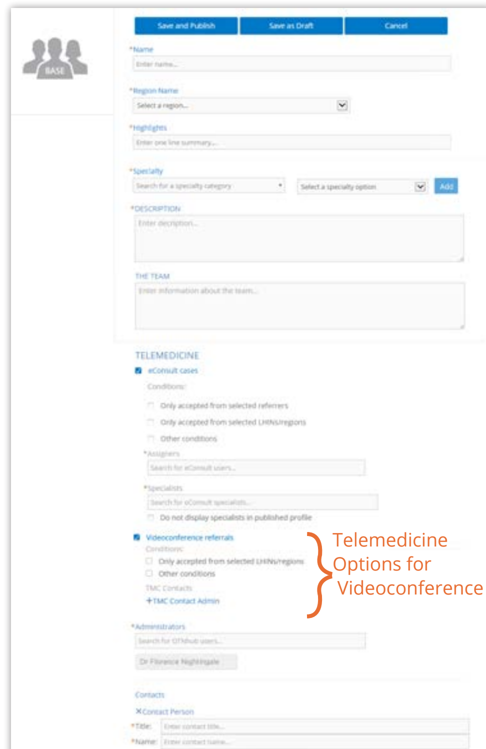

Figure 8: Edit group profile form

Continued next page...

<table>
<tr><th>Field (in order of appearance)</th><th>Description</th></tr>
<tr><td colspan="2">Clinical Protocols and Forms</td></tr>
<tr><td colspan="2">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's View Profile Details or Edit Profile Details page.

See Managing Clinical Protocol Attachments and Links on page 10.</td></tr>
<tr><td colspan="2">Administrators and Contacts</td></tr>
<tr><td>*Administrators</td><td>An Administrator is responsible for creating and maintaining the group's Directory profile. The person creating the group profile is automatically assigned as an administrator but additional administrators can be added.

Search for and select one or more OTNhub users. (See 'Specialist' field instructions on page 5.)

Each selected person's name, phone number, and email will be published in the group's Directory profile.

To remove a previously selected person from the list, click the red X beside their name.</td></tr>
<tr><td>Contacts</td><td>A Contact is someone who can answer questions or concerns about the group 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.

Each contact's name, phone number, and email will be published in the group's Directory profile.

To remove someone from the list, click the XContact Person link for that contact.</td></tr>
<tr><td>Indigenous Services</td><td>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 can apply to OTN to have their profile updated with this set to 'Yes'.

See Indigenous Services FAQ.</td></tr>
</table>

Editing a Profile

The options available when you edit a group'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.

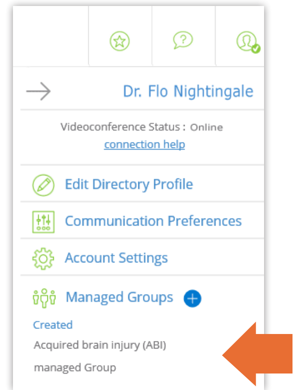

Figure 9: User panel menu

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 **Managed Groups** section in the panel and click the desired group 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 form appears.

4. Change or add information as necessary. (For field descriptions, see BASE Managed Specialty Group 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.
   - 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.

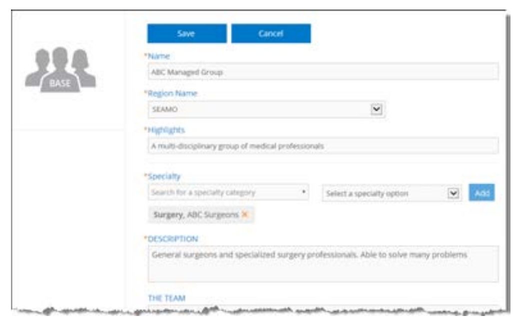

Figure 10: Edit published group form

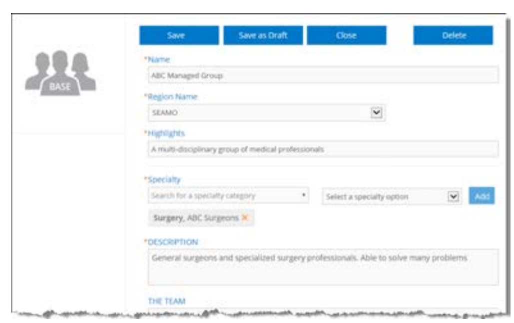

Figure 11: Edit unpublished or draft group form

Un-publishing a Profile

When you un-publish a profile it is immediately removed from all Directory searches and eConsult specialist searches.

An unpublished profile appears as a 'draft' in the My Groups 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 name.

   The group'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 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.)

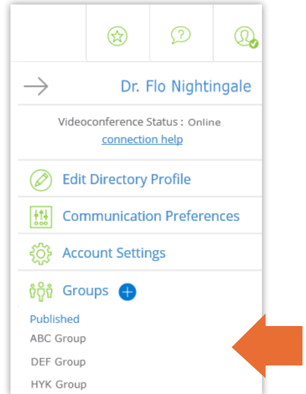

Figure 12: User panel menu

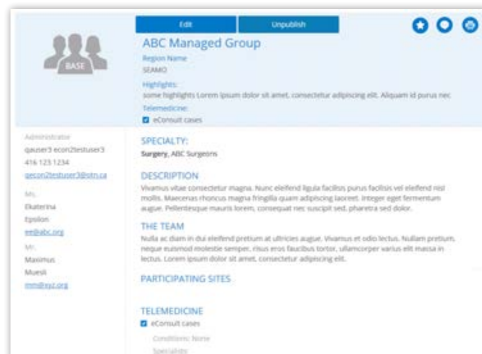

Figure 13: Published group profile

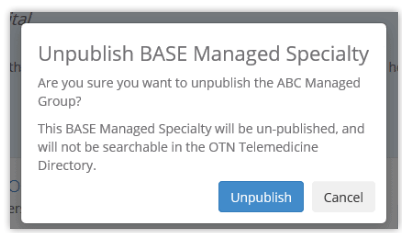

Figure 14: Confirmation dialog box

Deleting a Profile

You can delete only unpublished or draft group 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 profile if there are open cases submitted to the group.

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

   The group'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 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.
   - Displays the eConsult dashboard.

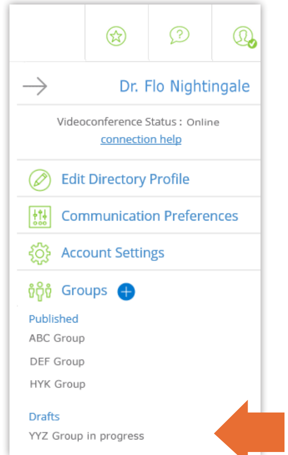

Figure 15: User panel menu

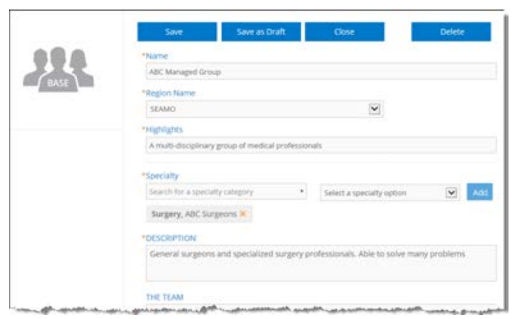

Figure 16: Edit unpublished or draft group profile

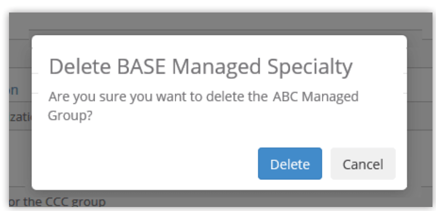

Figure 17: Confirm deletion dialog box

Managing Clinical Protocol Attachments and Links

Clinical protocols are procedural documents and forms provided by healthcare providers, sites, or groups/programs.

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

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

If the group 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.

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

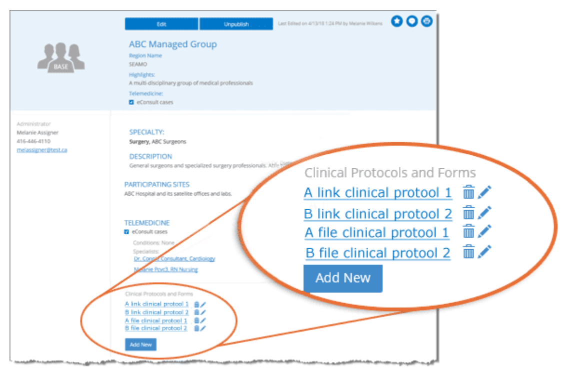

Figure 19: Clinical protocols section within Edit Profile and with edit permissions

Accessing Clinical Protocols Fields

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

1. Sign in at otnhub.ca and go to the **Directory** service.
2. Search for the group 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.

Adding a File or Link

1. Access the clinical protocols section of the 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.

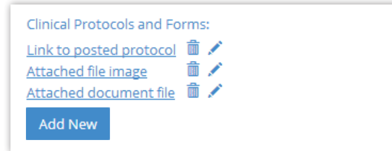

Figure 20: Clinical protocols

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.)

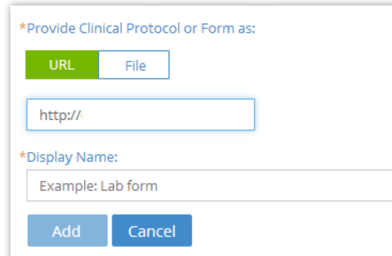

Figure 21: Add URL clinical protocol

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.

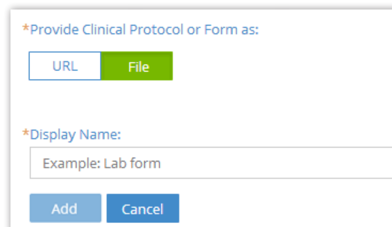

Figure 22: Add file clinical protocol

* 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.

1. Access the clinical protocols section of the profile.
2. To view the clinical protocol fields, click the **Edit** icon ( ) beside a listed item.

   The protocol panel appears with the current link/file and its associated Display Name.

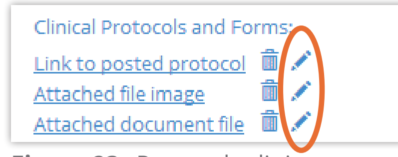

Figure 23: Protocol edit icons

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.

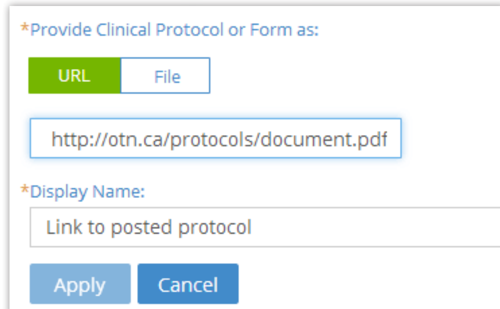

Figure 24: Edit protocol URL fields

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.

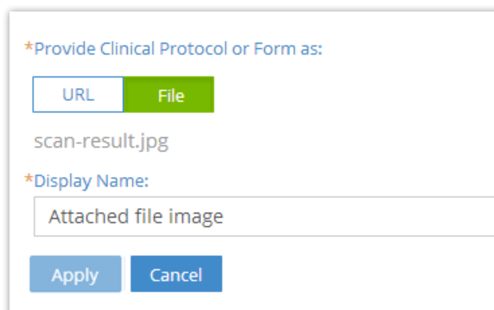

Figure 25: Edit protocol file fields

* 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 the 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.

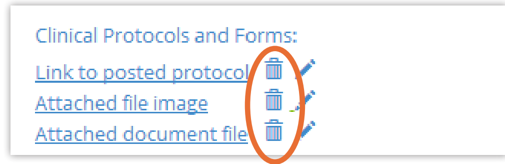

Figure 26: Protocol delete icons