Updating Scheduling Permissions

An organization's Ontario Health (OTN) **Primary Contact for Service (PCS)** supports the delivery of virtual health care services within their organization. They manage the scheduling permissions for their registered users. An organization's PCS plays a critical role in preventing privacy breaches by periodically reviewing OTNhub scheduling permissions for users in their organization.

A PCS can use the **Manage Active Users** dashboard to view **a list of users** at an organization and then find a specific user to:

- View the current permitted systems for scheduling a video event and then add or remove a system (Note: A ' system' can be a PCVC or a room-based system.)

- View the current access to schedule a clinical event* and then add or remove the ability to schedule a clinical event.

- View and edit the Videoconference Settings for a user.

These instructions describe how a PCS can manage scheduling permissions for their active OTNhub users. The changes take effect immediately.

(To view and manage all users who can schedule for a specific system, see Using the Manage Systems Dashboard 🔴.)

Accessing the Manage Users Feature and Locating a User

If you are a PCS for your organization, the OTNhub User panel shows a 'Manage Users' option.

1. Sign in at otnhub.ca🔗, click the **User Panel** link 🟢 in the top-right banner, and then click **Manage Users**.

2. Locate the desired user in the **Active User List**. To filter the listed names, search for a user by typing at least two characters in the **Search for a user** field.

3. Click the **Scheduling (Ncompass)** icon 📅 or the **Videoconference (PCVC)** icon 🎥 for that user.

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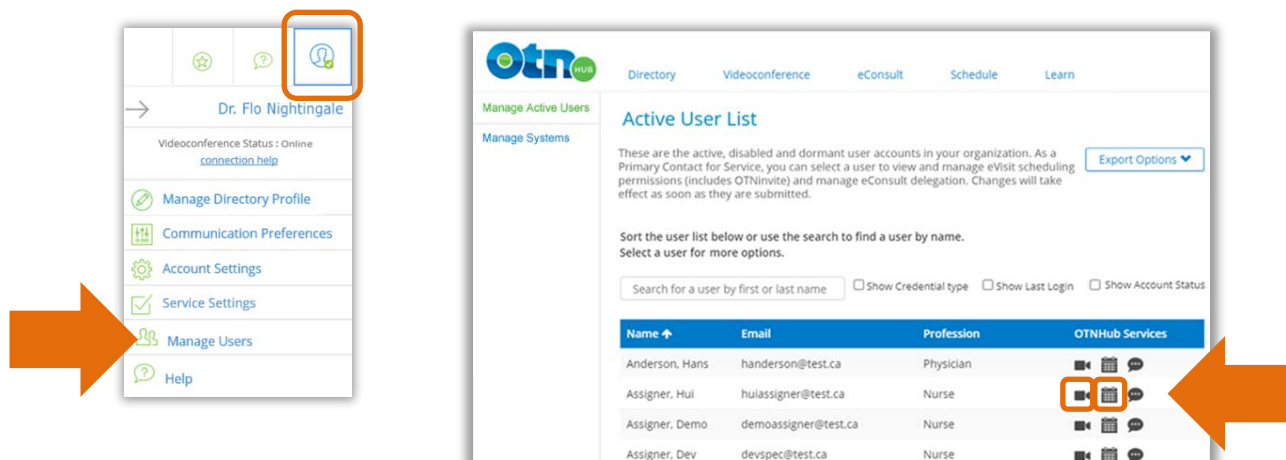
* Access to personal health information in the OTNhub is permitted only for the purpose of providing, or supporting the provision of, healthcare to patients. Any collection, use (including access to or viewing), disclosure or retention of personal health information by delegates in relation to their use of OTNhub is deemed to be on behalf of the member (organization or solo practitioner) and is subject to the Personal Health Information Protection Act, 2004.

Managing Clinical Scheduling Permissions

You can view the current clinical permissions and list of systems permitted for scheduling a video event.

When given *clinical* scheduling permissions, a user can add patient information to a video event and view the patient information in OTNhub Scheduling (Ncompass) and eVisit (Videoconference). If the user currently has clinical scheduling permission, a check mark appears beside the ☑ **Ability to schedule a clinical event** field.

Users without clinical permissions can see clinical events, however the patient information is masked with asterisks.

You can change scheduling permissions only for 'active' users and for one user at a time.

1. To permit the selected user to *schedule clinical events* and see patient information, select the ☑ **Ability to schedule a clinical event** check box.

   To remove the permission, clear the ☐ **Ability to schedule a clinical event** check box.

2. To initiate the request, click `Continue`.

   A confirmation screen appears.

3. Review the information to ensure it is correct.

4. To **confirm** the change and immediately update the user's account, click `Submit`.

   If all is okay, the eVisit Scheduling screen reloads, and a success message appears.

   The changes take effect immediately.

< back to user summary

Phil Barnes
Email: pbarnes@abc.org   Credential type: OTN
Profession: Nurse   Last login: (account is active)

▇◀ eVisit Scheduling

Select the checkbox to make a change to clinical scheduling permissions:
☐ Ability to schedule a clinical event ⓘ

Add a new System
Use the search bar below to add an eVisit system for this user.

Enter a PCVC user's name or system name to refine your search …

Current Scheduling Permissions
eVisit scheduling access is enabled for this list of PCVC users or systems. You can remove acc…

Continue   Cancel

* Continue button becomes active only after you select a system.

Change(s) to Scheduling Permissions and/or Access - Please Confirm

Please confirm your changes.

Name	Email	Profession
Phil Barnes	pbarnes@abc.org	Nurse

Ability to schedule Clinical Events: ADDED

Submit   Back

Managing System Scheduling Associations

When an eVisit (PCVC) or room-based system is '*associated*' with a user's account, that user becomes a '*scheduling delegate*' for the system. When a user is associated with a system:

- They can schedule the system for video visits using OTNhub (eVisit or Ncompass).
- The system will appear in their Ncompass calendar, the Ncompass 'My Systems' drop-down list, and their eVisit 'Schedule on behalf of' drop-down list.

The **eVisit Scheduling** form allows you to add or remove system associations for a user.

Search for and add a system

Remove a system

Adding a system to a user account

1. To search for a user's PCVC system or a room-based system, type two to three characters of the last name, first name, contact email, or the system name in the **search field**. The search results appear in alphabetical order.

2. Click the desired system name in the search results. list.

    A **To Be Added** section appears with the selected system.

3. To add more systems:
    - To add *a specific system*, repeat steps #1 and #2.
    - To add *all systems for a site*, click the "add all" link in the site title bar.

4. Review the **To Be Added** list for accuracy.

5. If you need to change the pending systems:
    - To remove *a specific system*,click the associated 'delete' link.
    - To remove *all pending systems*, click the "delete all" link in the site title bar.

6. To initiate the request, click [Continue].
    A confirmation screen appears.

7. Review the information to ensure it is correct.

8. To **confirm** the change and immediately update the user's account, click [Submit].

    If all is okay, the eVisit Scheduling screen reloads with updated information and a success message appears.

    The changes take effect immediately.

Search results with PCVC user systems

Search results with room-based systems

"Add all" link

"To be added" list

Removing a system from a user account

1. To remove a single system, click the "remove" link associated with the system you want to remove.
    To remove all systems at a site, click the "remove all" link in the site title bar.

    The system(s) pending removal change to a light grey colour.

2. If you want to cancel this action, click the associated "**undo**" link
    (or click the "undo all" link if you used the "remove all" action).

3. To initiate the request, click **Continue** .

    A confirmation screen appears.

4. Review the information to ensure it is correct.

5. To **confirm** the change and immediately update the user's account, click **Submit** .

    If all is okay, the Current Scheduling Permissions list reloads with
    the updated information and a success message appears.

    The changes take effect immediately.

Managing a User's Videoconference Settings

Updating the TAC for a user

The Primary Therapeutic Area of Care (TAC) identifies a user's typical videoconference usage.

It is important for reporting purposes, both for Ontario Health (OTN) and the Ontario Ministry of Health.

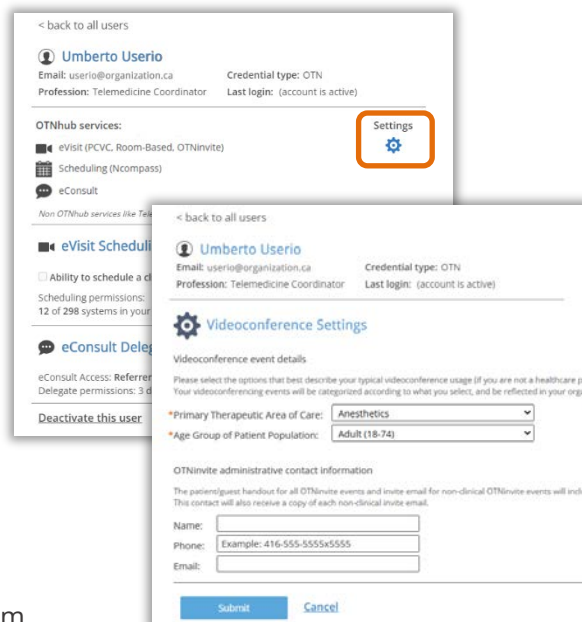The TAC is applied to every videoconference event, when an eVisit is scheduled or an on-demand video call is started.

If the user is not a health care provider, select "Other" and "All Ages".

1. Access the Manage Users dashboard and click on a **user's name** in the list.

2. In the **OTNhub services** section, click ⚙ beside the **eVisit** service.

3. To identify the primary event type for the user, click the **Primary Therapeutic Area of Care** drop-down arrow and select the appropriate entry from the list.

4. To identify the primary age group the user will cater to, click the **Age Group of Patient Population** drop-down arrow and select the appropriate entry from the list.

5. To save the new settings, click **Submit**.

   If all is okay, the Settings screen reloads, and a success message appears.

   If there is an error, an error message appears. Correct the error and try again.

Updating the OTNinvite administrative contact

The Admin Contact can include a name, phone, and email for the team or department within a user's organization.

When provided, the Admin Contact information appears in the following places.

	Email invitation	Patient Handout
Clinical Events	✗	✓
Learning & Meeting Events	✓	✓

1. Type the information in the appropriate fields (**Name**, **Phone**, and **Email**).

2. To save the new settings, click **Submit**.

   If all is okay, the Settings screen reloads, and a success message appears.

   If there is an error, an error message appears. Correct the error and try again.