

Updating eConsult Delegate Relationships

An organization's Ontario Health (OTN) **Primary Contact for Service (PCS)** supports the delivery of virtual care services within their organization. OTNhub users at an organization can contact their Primary Contact to request changes to their OTNhub account or the services available to them via the OTNhub. Primary Contacts also play a critical role in preventing privacy breaches by periodically reviewing OTNhub eConsult delegation relationships for users in their organization.

If you are registered with Ontario Health (OTN) as a 'primary contact' for your organization, the OTNhub User panel displays a "Manage Users" option.

The instructions below describe how an organization's PCS can manage eConsult delegate relationships for their active, Ontario Health (OTN)-registered users.

A specialist or referrer can have one or more delegates associated with their eConsult service.



eConsult Delegator

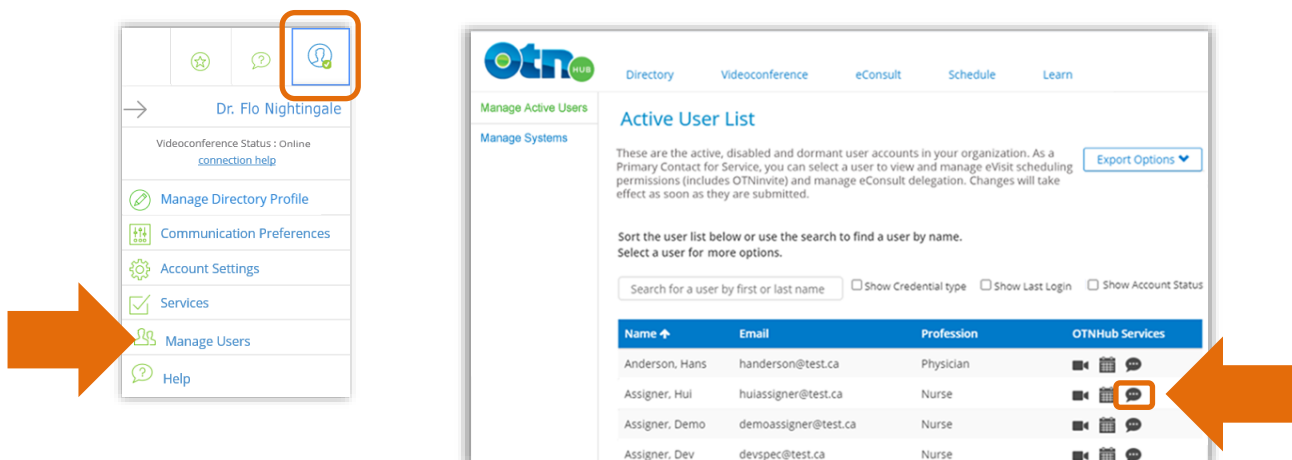
An eConsult delegator is a health care professional who may submit an eConsult request and/or respond to eConsult requests. See [Managing eConsult Delegators](#).

eConsult Delegate*

An eConsult delegate is someone who can act on behalf of their specialist or referrer (delegator). Once assigned as a delegate, that person has the same eConsult dashboard view and can perform the same functions as the specialist or referrer who delegated them. See [Managing eConsult Delegates](#).

Accessing the Manage Users Feature and Locating a User

1. Sign in at otnhub.ca and 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 **eConsult** icon  for that user. An **eConsult Delegation** screen appears.



* NOTE: eConsult delegates have access to personal health information (PHI) and eConsult case content on behalf of their delegator and the member organization. Delegate access to PHI is subject to the Personal Health Information Protection Act, 2004.

Managing OTNhub Accounts

Managing eConsult Delegates

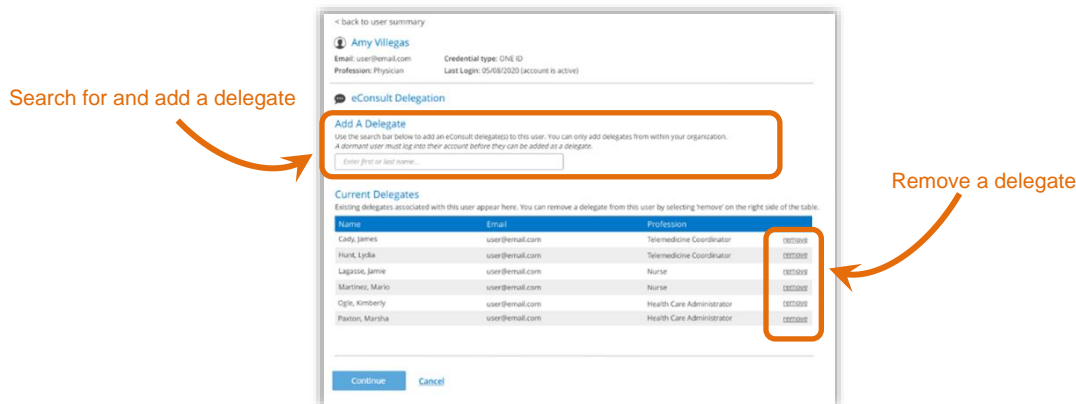
You can change eConsult delegate relationships only for “active” users in your organization.

Delegate search results will include users who do not have access as a referrer or specialist. The delegate search will generally include registered nurses, registered practical nurses, telemedicine coordinators, medical students, medical residents, fellows, and health care administrators.

When the selected user has a dormant account (that is, when the user has not accessed their account in over 6 months):

- If the user account info (e.g., name and contact email) is still valid, advise the user to log into their account to bring it out of dormancy.
- Otherwise, if you wish to deactivate the account, send an email request to ContactUpdates@otn.ca

The **eConsult Delegation** form allows you to add or remove delegates for a referrer or specialist.



Adding a Delegate

1. To search for a user, type two to three characters of the last or first name, or contact email in the **Add a Delegate** field. Matching names appear in alphabetical order by last name, and then first name.

Delegates with an active OTNhub account (not dormant) in the same organization as the PCS may be included in the search results.

2. Click the desired name in the drop-down list.
A **To Be Added** section appears with the selected user listed.

3. To add more delegates, repeat steps #1 and-#2.

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

5. To remove a potential delegate from the list, click its associated “delete” link.

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

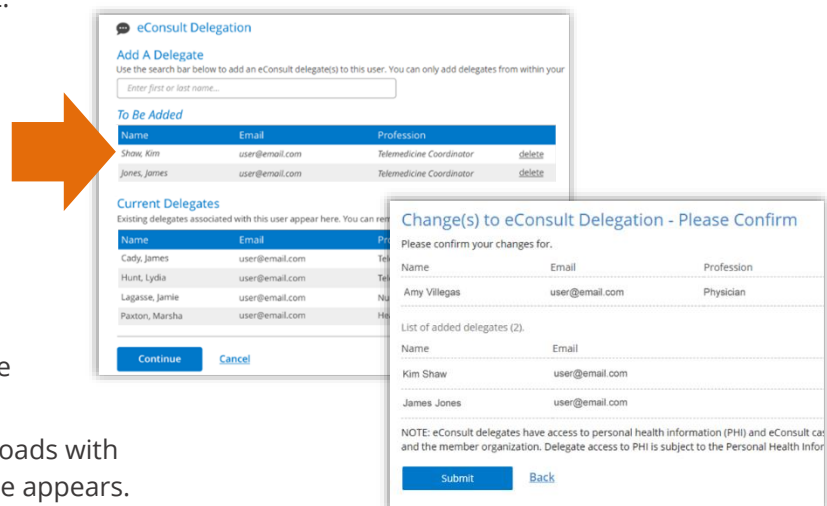
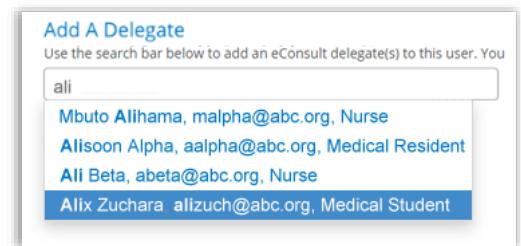
A confirmation screen appears.

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 eConsult Delegation screen reloads with the updated information and a success message appears.

The changes take effect immediately.



Removing a Delegate

1. Locate the desired user in the **Current Delegates** list and click its associated **“remove”** link. The user's list-item changes to a light grey colour and the remove link changes to **“undo”**.

Name	Email	Profession	
Cady, James	user@email.com	Telemedicine Coordinator	remove
Hunt, Lydia	user@email.com	Telemedicine Coordinator	remove
Lagasse, Jamie	user@email.com	Nurse	remove
Martinez, Mario	user@email.com	Nurse	undo
Ogle, Kimberly	user@email.com	Health Care Administrator	remove
Paxton, Marsha	user@email.com	Health Care Administrator	remove

2. If you need to cancel the action and reset the user, click the **“undo”** link.
3. To initiate the request, click **Continue**.

A confirmation screen appears.

Change(s) to eConsult Delegation - Please Confirm

Please confirm your changes for.

Name	Email	Profession
Amy Villegas	user@email.com	Physician

List of removed delegates (1).

Name	Email
Mario Martinez	user@email.com

NOTE: eConsult delegates have access to personal health information (PHI) and eConsult care and the member organization. Delegate access to PHI is subject to the Personal Health Information Policy.

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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 eConsult Delegation screen reloads with the updated information and a success message appears.

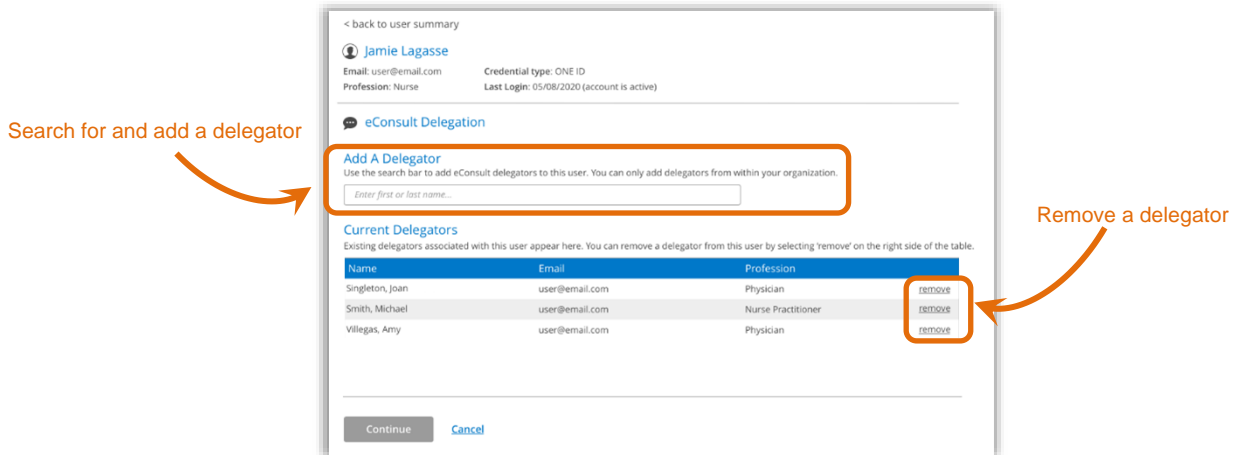
The changes take effect immediately.

Managing eConsult Delegates

You can change eConsult delegate relationships only for “active” users in your organization.

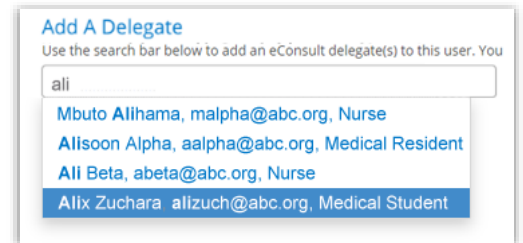
The **eConsult Delegation** form allows you to add or remove delegators for a user.

Note: Delegator search results will include only users who have access as a referrer or specialist.



Adding a Delegator

1. To search for a user, type two to three characters of the last or first name, or contact email in the **Add a Delegator** field. Matching names appear in alphabetical order by last name, and then first name. An eConsult referrer or specialist with an active OTNhub account (not dormant) in the same organization as the PCS may be included in the search results.



2. Click the desired name in the drop-down list. A **To Be Added** section appears with the selected user listed.

3. To add more delegators, repeat steps #1 and-#2.

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

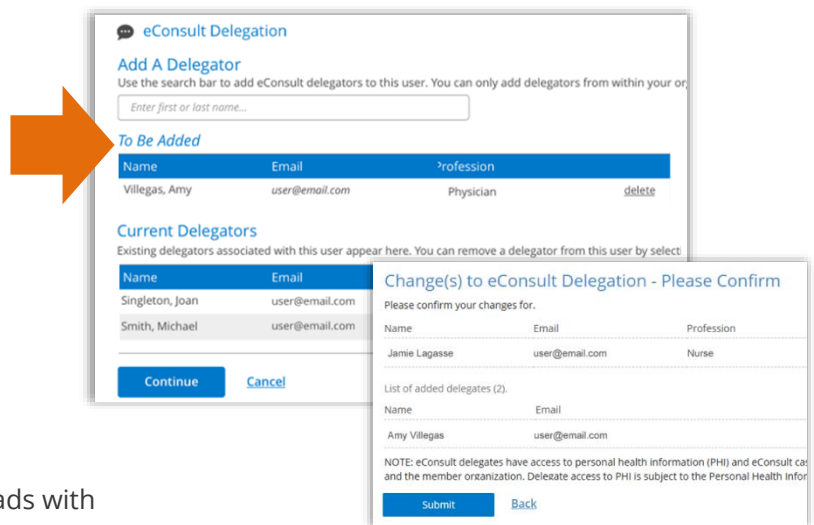
5. To remove a potential delegator from the list, click its associated “delete” link.

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 user’s account, click **Submit**.



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

The changes take effect immediately.

Removing a Delegator

1. Locate the desired user in the **Current Delegators** list and click its associated **“remove”** link. The user’s list-item changes to a light grey colour and the remove link changes to **“undo”**.

Name	Email	Profession	
Singleton, Joan	user@email.com	Physician	remove
Smith, Michael	user@email.com	Nurse Practitioner	remove
Villegas, Amy	user@email.com	Physician	undo

2. If you need to cancel the action and reset the user, click the **“undo”** link.
3. To initiate the request, click **Continue**.

A confirmation screen appears.

Change(s) to eConsult Delegation - Please Confirm

Please confirm your changes for.

Name	Email	Profession
Jamie Lagasse	user@email.com	Nurse

List of removed delegators (1).

Name	Email
Amy Villegas	user@email.com

NOTE: eConsult delegates have access to personal health information (PHI) and eConsult cas and the member organization. Delesgate access to PHI is subject to the Personal Health Infor

[Submit](#) [Back](#)

4. Review the information to ensure it is correct.
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