Using the Manage Systems Dashboard

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.

A 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 Systems** dashboard to view a **list of sites and systems** at their organization (eVisit/PCVC or room-based) and then find a specific system and add or remove schedulers for that system. (To manage clinical scheduling from a **list of users** at an organization, see [Managing Scheduling Permissions](#)📄.)

Schedulers will see the systems for which they have scheduling permission in their:

- Scheduling (Ncompass) calendars and "My Systems" drop-down list
- Videoconference (eVisit) "Schedule on behalf of" drop-down list

Schedulers with clinical access* can add patient information when required.

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

Notes
i) You can add only 'active' users to a system (that is, users who do not show a 'dormant' status).
ii) The user must have access to Videoconference (eVisit) or Scheduling (Ncompass) to schedule a videoconference.

## Accessing the Manage Systems Feature

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**.

   An Active User List appears.

2. To access the system search, click **Manage Systems** in the left navigation panel.

   The **Manage Video Systems** form appears.
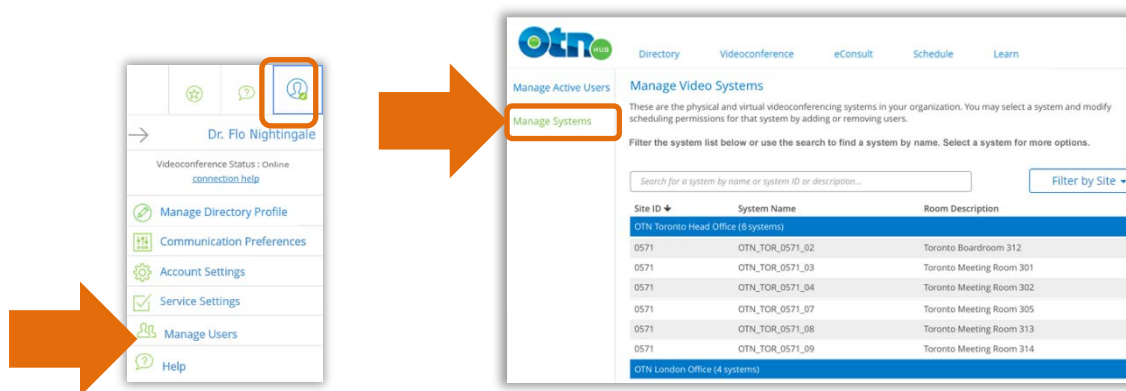
* Access to personal health information in the OTNhub is permitted only for the purpose of providing, or supporting the provision of, healthcare to patients. Any collection, use (including access to or viewing), disclosure or retention of personal health acformation by delegates in relation to their 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.

Adding and Removing Schedulers for a System

The **Manage Video Systems** form lists the physical (*e.g.*, room-based) and virtual (*e.g.*, OTNhub eVisit/PCVC) videoconferencing systems in your organization. You can select a system and then add or remove schedulers.

1. To find a system, use the search, filter, and sort features. For example:
   - Type at least two characters of the site or system name in the **Search field** and select from the drop-down list.
   - To select and view systems for only one or more sites, use the **Filter by Site** button.
   - To **sort the table,** click on a column header.

2. To view the current schedulers for a system, click the desired row-item.

   The **Add a Scheduler** screen appears.

   A ⊕ beside a user's name shows that they have **clinical** scheduling permissions.
   - They can schedule clinical events and see patient information.
   - For instructions about changing clinical scheduling permissions, see Managing Scheduling Permissions🔗.

3. Adding or removing a scheduler.

   To add a scheduler:
   i) To filter the listed names, search for a user by typing at least two characters in the search field.

   A drop-down list of matching names appears.
   ii) To identify a scheduler, click the name In the drop-down list.

   A new section, **To Be Added**, appears with the selected user listed.

   To remove a scheduler from the To Be Added list, click the associated "delete" link.
   iii) Repeat the above steps (i) and (ii) for each scheduler you want to add.

   To remove a scheduler,
   i) To identify a scheduler for removal, click that scheduler's associated "*remove*" link in the **Current Schedulers** list.
   - The user's list entry changes to light grey.
   - The "remove" link changes to "*undo*".

   ii) Repeat for each scheduler you want to remove.
   (If you change your mind and do not want to remove a scheduler, click the associated "undo" link.)

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Manage Systems screen: (1) Filter the listed sites and systems and then (2) click the system name.

Add a Scheduler screen: (3) Search for a user and to select, click the name in the drop-down list. Repeat for all users you want to add. You can add and remove multiple schedulers.

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

   A confirmation screen appears.

5. Review the information to ensure it is correct.

6. To **confirm** the change(s) and immediately update the user account(s), click `Submit`.

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

   The changes take effect immediately.

Change(s) to System Scheduler(s) - Please Confirm

Please confirm your changes for.

System Name	Site ID	Description
OTN_LON_0575_06	0575	London Meeting Room 105

List of added scheduler(s) (1).

Name	Email
Amy Villegas	a.villagos@gmail.com

NOTE: Schedulers with clinical access have access to personal health information (PHI). PHI is subject to the Personal Health Information Protection Act, 2004.

`Submit`   Back