

Managing User Accounts and Offboarding Users

Last revised: Sept. 2019

An organization's **OTN primary contact** supports the delivery of telemedicine services within their organization. OTN users at an organization may contact their OTN primary contact to request changes to their OTN account or the services available to them via the OTNhub. OTN primary contacts also play a critical role in preventing privacy breaches by periodically reviewing OTN user lists for their organization, ensuring such lists remain up-to-date, and by requesting updates or removal of access for users as required.

Instructions are provided below for OTN primary contacts to access the "Manage Users" feature available via the OTNhub. Instructions are also provided for exporting user lists and requesting changes to the list.


OTN recommends that OTN primary contacts review their organization's user list on a monthly basis to ensure the lists are accurate and up-to-date, and to help prevent unauthorized access by individuals who may no longer be agents of the organization or who no longer require the same level of OTNhub access.

When people at the organization require changes to their OTNhub services or OTN account, they should notify their OTN primary contact (*e.g.*, if they need to change something in their account information that isn't available via the self-serve options or if they want to add an OTNhub service to their account).

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Accessing the Manage Users Feature

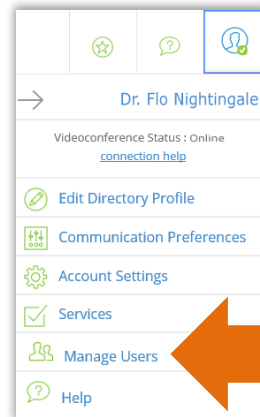
If you are registered with OTN as a 'primary contact' for your organization, the OTNhub User/Self Service panel displays a "Manage Users" option.

1. Sign in at otnhub.ca and click the **User Panel** link () in the top right banner.

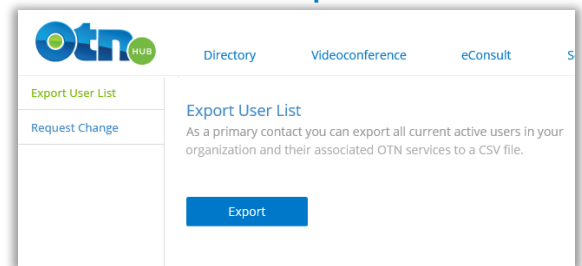
A **User/Self-Service** panel appears.

2. Click the **Manage Users** link in the panel.

The **Export User List** screen appears.



User panel menu



Export User List screen

For assistance and support accessing or using the "Manage Users" feature, contact OTN at 1-855-654-0888



Exporting a User List

If you are a 'primary contact' for an organization, you can export a list of all the users at your organization.

The exported list is a comma-separated file (.csv), which you can open with Excel or another spreadsheet program.

1. [Access the 'Manage Users'](#) feature within OTNhub.

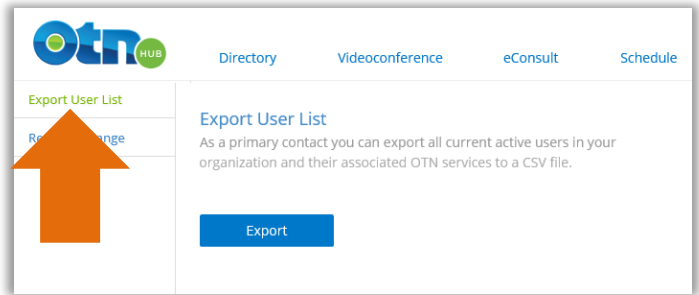
The **Export User List** screen is the default screen.

2. To create the exported user list, click .

Depending which browser and computer you have, you will either get a message to save or open the file, or the file will open in Excel (or your default spreadsheet program).

The exported file contains the following information for each user:

- First name
- Last name
- Email address
- Profession
- OTNhub services (separated by a semi-colon)



Export user list screen

	A	B	C	D	E
1	First Name	Last Name	Email Address	Profession	Service
2	Anu	Alpha	aa@hospital.org	Other	eConsult;Directory
3	Beemo	Beta	bb@hospital.org	Nurse	Directory;eConsult;PCVC/OTN Invite(Gues
4	Dieter	Delta	dd@hospital.org	Physician	Directory;NCompass/Scheduling Access
5	Ekaterina	Epsilon	gg@hospital.org	Allied Heal	PCVC/OTN Invite(Guestlink) Access;NCom
6	Gerbux	Gamma	gg@hospital.org	Physician	NCompass/Scheduling Access;eConsult;Di
7					
8					
9					
10					


Exported user list spreadsheet file

Exporting a Delegate List

If you are a 'primary contact' for an organization, you can export a list of all the delegators and their associated delegates at your organization for a specific OTN service.

Note: This report will not show relationships if the delegator (e.g., physician) is not part of your organization.

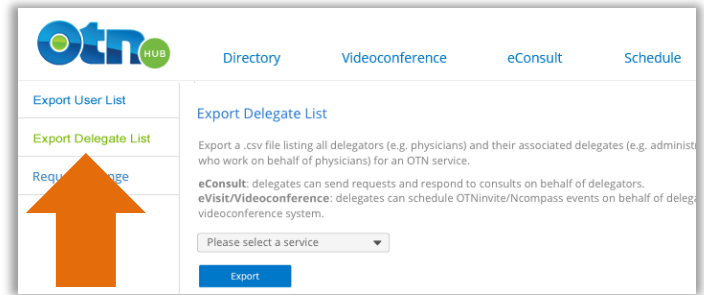
The exported list is a comma-separated file (.csv), which you can open with Excel or another spreadsheet program.

1. [Access the 'Manage Users'](#) feature within OTNhub. The **Export User List** screen is the default screen.
2. Click **Export Delegate List** in the left navigation panel.
3. Click the **Select a service** dropdown arrow and select the desired service (either eConsult or eVisit/Videoconference).
4. To create the exported user list, click .

Depending which browser and computer you have, you will either get a message to save or open the file, or the file will open in Excel (or your default spreadsheet program).

The exported file contains the following information for each delegator:

- Delegator first name
- Delegator last name
- Delegator email
- Number of delegates
- Delegate 1 first and last name
- Delegate 2 first and last name
- Delegate 3 first and last name
- Etc... (for as many delegates as belong to the delegator)
- For each delegate, a checkmark appears if that delegate works on behalf of a listed delegator.



Export delegate list screen

Delegator	First Name	Delegator Last Name	Email Address	# of delegates	Jenny Guest	John Kingston	Kitty Barton	...
OTN	Tester		otntester1@gn	5	✓			
Ken	Chip		kchip@test.ca	8		✓		
Danny	Dent		ddent@test.ca	2		✓		
Test	User01		tuser01_comm	21			✓	
Ron	Best		rbest@test.ca	25	✓	✓		
Greg	Smith		gregsmith@te	3	✓			
Penny	Wise		pwise@test.ca	2	✓			
Sam	Rangle		rangle@test.ca	15		✓	✓	
Pea	Body		pbody@test.ca	20		✓	✓	
Hui	Referrer		huireferrer@te	10		✓		
Hui	Consultant		huiconsultant@	11		✓	✓	
Hui	Assigner		huiassigner@ti	14		✓	✓	

Exported delegate list spreadsheet file

Exporting a Scheduling Access List

If you are a 'primary contact' for an organization, you can export a list of all the room-based systems and their associated users at that organization.

The exported list is a comma-separated file (.csv), which you can open with Excel or another spreadsheet program.

1. [Access the 'Manage Users'](#) feature within OTNhub.

The **Export User List** screen is the default screen.

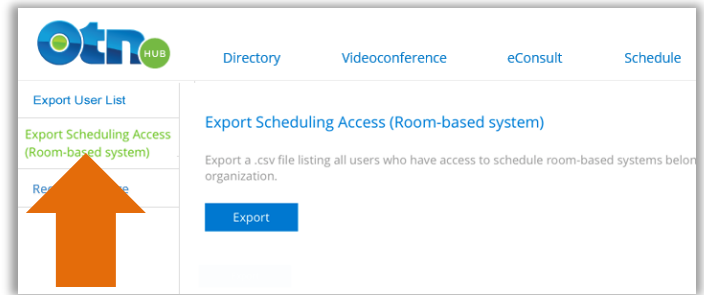
2. Click **Export Scheduling Access (Room-based system)** in the left navigation panel.

3. To create the exported user list, click .

Depending which browser and computer you have, you will either get a message to save or open the file, or the file will open in Excel (or your default spreadsheet program).

The exported file contains the following information for each delegator:

- Site Name
- System ID
- # of schedulers
- Scheduler 1 First name + Last name
- Scheduler 2 First name + Last name
- Scheduler 3 First name + Last name
- Etc... (for as many users as are associated with a system at the site)
- For each user, a checkmark appears if that user has access to schedule the listed system.



Export scheduling access list screen

Site Name	System ID	# of schedulers	Arna	Demar	Diana	Bujold	Nicole	Maise	Ben Smith	Frank Dennis	Stephen King	Pierre	Regid	Stephanie	St Susan Berg
LHSC - Regional Cancer Pro	SY50381-01	1													
LHSC - Regional Cancer Pro	SY50381-02	1	✓												
LHSC - Regional Cancer Pro	SY50381-03	1		✓											
LHSC - Regional Cancer Pro	SY50381-04	2	✓	✓											
LHSC - Regional Cancer Pro	SY50381-05	1	✓												
LHSC - Regional Cancer Pro	SY50381-06	1					✓								
LHSC - Regional Cancer Pro	SY50381-07	1					✓								
LHSC - Regional Cancer Pro	SY50381-08	3	✓	✓	✓										
LHSC - University Hospital	SY50383-01	2						✓			✓				
LHSC - University Hospital	SY50383-02	3						✓	✓	✓					
LHSC - University Hospital	SY50383-03	3						✓	✓	✓					
LHSC - University Hospital	SY50383-04	3						✓	✓	✓					
LHSC - Victoria Hospital	SY50384-01	3										✓	✓	✓	
LHSC - Victoria Hospital	SY50384-02	2										✓	✓		
LHSC - Victoria Hospital	SY50384-03	1										✓			
LHSC - Victoria Hospital	SY50384-04	2										✓	✓		
LHSC - Victoria Hospital	SY50384-05	3										✓	✓	✓	
LHSC - Victoria Hospital	SY50384-06	3										✓	✓	✓	
LHSC - Victoria Hospital	SY50384-07	3										✓	✓	✓	
LHSC - Victoria Hospital	SY50384-08	3										✓	✓	✓	
LHSC - Victoria Hospital	SY50384-09	3										✓	✓	✓	
LHSC - Victoria Hospital	SY50384-10	3										✓	✓	✓	

Exported scheduling access list spreadsheet file

Requesting a Change to the User List

If you are a 'primary contact' for an organization, you can submit a request to deactivate a user from *all* OTNhub services.

Notes: (i) This deactivation request is for people who are being permanently removed as users from the organization and therefore will no longer need access to any OTNhub services (e.g., retired or permanently left the organization).

(ii) To deactivate services for a user who remains at your organization but no longer requires OTNhub access or to request a change to a service not included in a basic bundle (e.g., tele dermatology) for such a user, send an email request to contactupdates@otn.ca.

(iii) You can deactivate only one user at a time. For each additional deactivation, repeat these steps.

1. [Access the Manage Users](#) feature within OTNhub.

The **Export User List** screen appears.

2. Click the **Request Change** link in the left navigation panel.

A Request Change screen appears.

3. Click the **Request Type** drop-down link and select "*Permanently deactivate a user*".
4. To begin a search for users, type at least two characters in the **Select a User** field and select the user's name from the drop-down list.

5. In the **Reason** field, type a description about why you want to deactivate the user.

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

A confirmation screen appears.

7. Review the information to ensure it is correct and to send the request, click **Submit**.

If all is okay, the **Request Change** screen reloads and:

- A success message appears.
- An email is sent to OTN with your request details.
- Allow 3-5 business days for OTN to process your request. You will receive an email confirmation when the request is complete.

8. If you change your mind and do not want to submit the request, click **Cancel**.

Request change screen

Deactivation request confirmation