

Exporting User Lists

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 user lists for their organization, ensuring such lists remain up to date.

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Instructions are provided below for Primary Contacts to access the “Manage Users” feature and export user lists.

Ontario Health (OTN) recommends that 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 account, they should notify their 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).

Accessing the Manage Users Feature

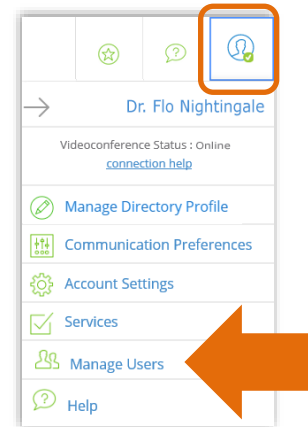
If you are registered with Ontario Health (OTN) as a ‘primary contact’ for your organization, the OTNhub User/Self Service panel displays a “Manage Users” option.

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.

An **Active User List** appears.



For assistance and support accessing or using the “Manage Users” feature, contact Ontario Health (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 the users at your organization and their associated OTNhub services.

The exported list includes all users registered at your organization – active, dormant, permanently deactivated and temporarily deactivated. (This list is different than the dashboard list, where deactivated users do not appear.)

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

For user accounts with a status of “**dormant**”, advise the user to log in to re-activate their account.

For user accounts identified as “**disabled**”, the PCS needs to send a request to Ontario Health (OTN) at ContactUpdates@otn.ca to reactivate the account.

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

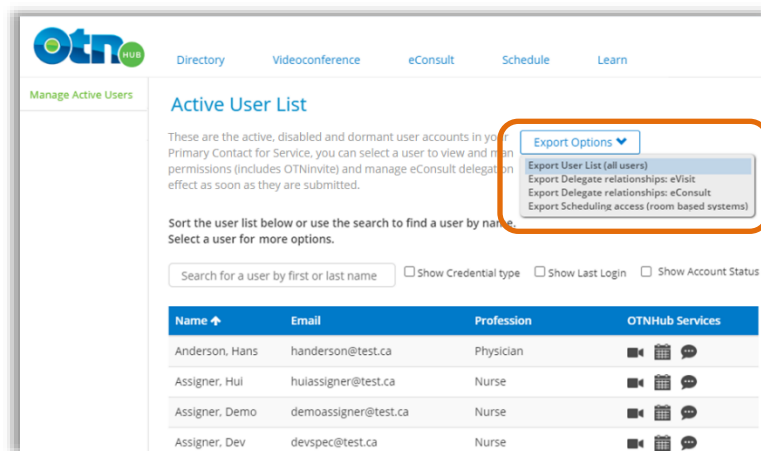
- To filter the listed names, search for a user by typing at least two characters in the **Search for a user** field.
- To view the user details, click the user's name.

2. To create the exported user list, click the **Export Options** drop-down arrow and select **Export User List (all users)**.

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
- Contact email
- Profession
- OTNhub services (separated by a semi-colon)
- Credential (ONE ID or OTN)
- Dormant? (yes or no)



Active user list screen

	A	B	C	D	E	F	G
1	First Name	Last Name	Email Address	Profession	Service	Credential	Dorma
2	Anu	Alpha	aa@hospital.org	Nurse Practitioner	Ncompass/Scheduling Acc	OTN Credential	No
3	Berno	Beta	bb@hospital.org	Physician	Ncompass/Scheduling Acc	OTN Credential	No
4	Dieter	Delta	dd@hospital.org	Physician	Ncompass/Scheduling Acc	OTN Credential	No
5	Ekaterina	Epsilon	ee@hospital.org	Allied Health Professic	Ncompass/Scheduling Acc	OTN Credential	No
6	Gerbux	Gamma	gg@hospital.org	Senior Software Devel	Directory;eConsult	OTN Credential	No
7	Ignacious	Iota	ii@hospital.org	Intermediate Java Web Developer		OTN Credential	No
8	Kyoko	Kappa	kk@hospital.org	Nurse	Ncompass/Scheduling Acc	OTN Credential	No
9	Li-Mei	Lamba	ll@hospital.org	Allied Health Professic	eVisit;Videoconference;N	OTN Credential	No
10	Mbuto	Mu	mm@hospital.org	Enterprise Architect		OTN Credential	No
11	Ollie	Omega	oo@hospital.org	Physician	Ncompass/Scheduling Acc	OTN Credential	No
12							
13							
14							

Exported user list spreadsheet file

Exporting a Delegate Relationships List

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

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

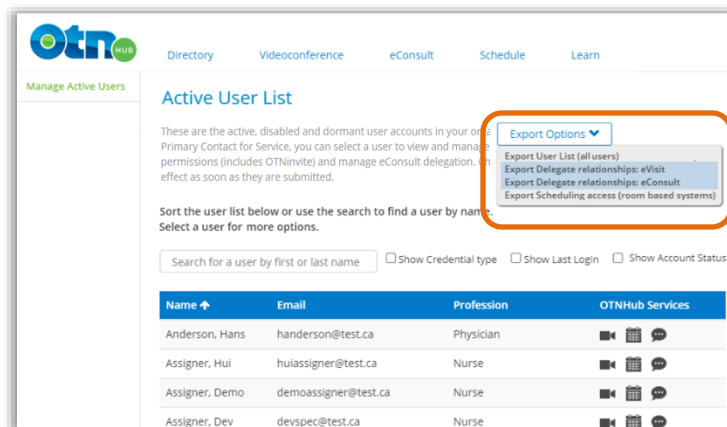
The exported list is a comma-separated file (.csv), which you can open with Excel or another spreadsheet app.

1. [Access the 'Manage Users'](#) feature within OTNhub.
 - To filter the listed names, search for a user by typing at least two characters in the **Search for a user** field.
 - To view the user details, click the user's name.
2. To create the exported user list, click the [Export Options](#) drop-down arrow and select **Export Delegate relationships: eVisit.** or **Export Delegate relationships: eConsult.**

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 username 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 "y" appears if that delegate works on behalf of a listed delegator.



Active user list screen

	A	B	C	D	E	F	G
1	Delegator First Name	Delegator Last Name	Username	# of delegates	Dela One	Deglat Two	Delgr Three
2	Anu	Alpha	aa@hospital.org	0			
3	Bemo	Beta	bb@hospital.org	0			
4	Dieter	Delta	dd@hospital.org	1 y			
5	Ekaterina	Epsilon	ee@hospital.org	0			
6	Gerbux	Gamma	gg@hospital.org	3 y	y		y
7	Ignacios	Iota	ii@hospital.org	0			
8	Kyoko	Kappa	kk@hospital.org	2		y	y
9	Li-Mei	Lamba	ll@hospital.org	0			
10	Mbuto	Mu	mm@hospital.org	1 y			
11	Ollie	Omega	oo@hospital.org	0			
12							
13							
14							

Exported delegate spreadsheet file

Exporting a Scheduling Access List

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

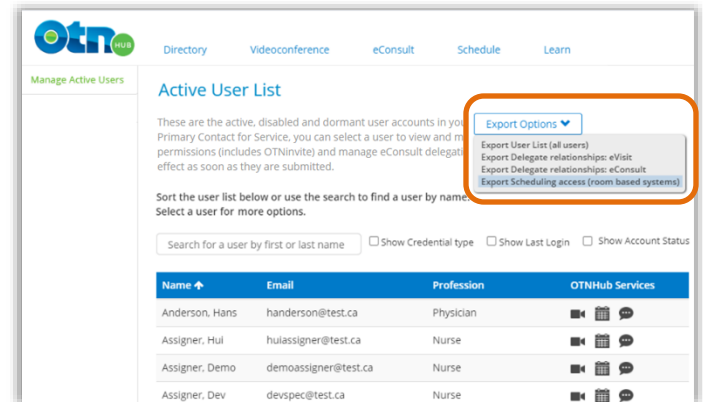
The exported list is a comma-separated file (.csv), which you can open with Excel or another spreadsheet app.

1. [Access the 'Manage Users'](#) feature within OTNhub.
 - To filter the listed names, search for a user by typing at least two characters in the Search for a user field.
 - To view the user details, click the user's name.
2. To create the exported user list, click the [Export Options](#) drop-down arrow and select **Export Scheduling access (room-based systems)**.

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 app).

The exported file contains the following information for each delegator:

- Site Name
- System Name
- # 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 "y" appears if that user has access to schedule with the listed system.



Active user list screen

Site Name	System Name	# of schedulers	Anu Alpha	Bemo Beta	Dieter Delta	Ekaterina Epsilon
ABC Hospital	TOR_ABC_5555_ABCC_001	0				
ABC Hospital	TOR_ABC_5555_ABCC_002	2	y		y	
ABC Hospital	TOR_ABC_5555_ABCC_003	0				
ABC Hospital	TOR_ABC_5555_ABCC_004	3	y	y		y
ABC Hospital	TOR_ABC_5555_ABCC_005	2			y	y
ABC Hospital	TOR_ABC_5555_ABCC_006	0				
ABC Hospital	TOR_ABC_5555_ABCC_007	1		y		
ABC Hospital	TOR_ABC_5555_ABCC_008	2	y			y
ABC Hospital	TOR_ABC_5555_ABCC_009	1		y		

Exported scheduling access list spreadsheet file