

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 and add or remove:

- The ability to [schedule a clinical event](#).*
- The ability to [schedule a system on behalf of another](#) OTNhub user. (Add or remove 'system associations').

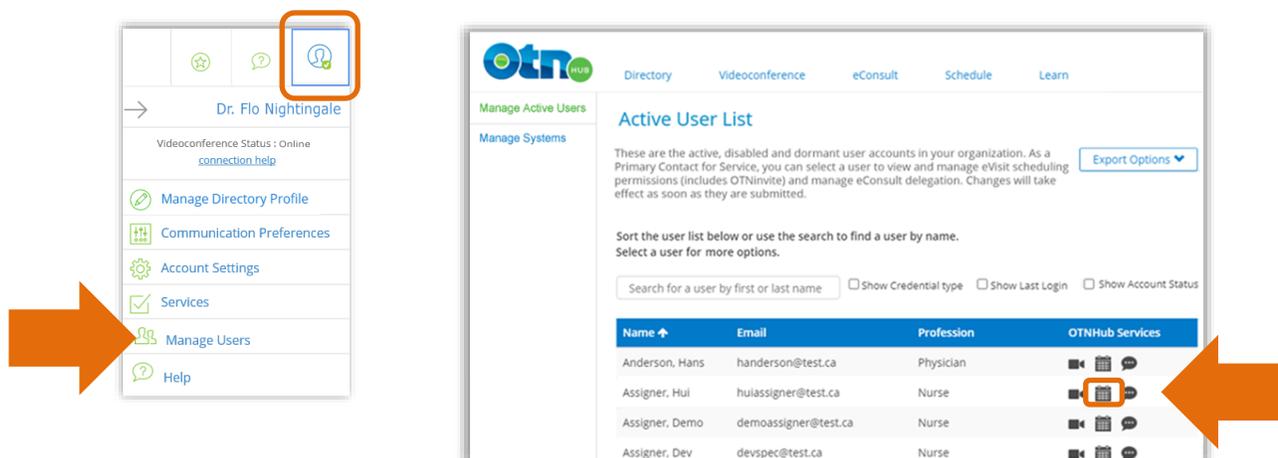
(To manage clinical scheduling from a **list of sites and systems**, see [Using the Manage Systems Dashboard](#).)

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

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  for that user.



* 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 Scheduling Permissions

You can add and remove clinical permissions for a user's account. When given clinical scheduling permissions, a user has access to health information in OTNhub Scheduling (Ncompass) and eVisit (Videoconference).

- *When scheduling a videoconference, they can add patients to an event.*
- *When viewing scheduled videoconference events, they will see the associated patient information. (Without clinical permissions, the patient information is hidden, it appears as asterisks.)*

The change takes effect immediately after you successfully submit the request.

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

If the user currently has clinical scheduling permission, a check mark appears beside the **Ability to schedule a clinical event** field.

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.

The screenshot shows the 'eVisit Scheduling' configuration page for user Phil Barnes. At the top, there is a link '< back to user summary'. Below this, the user's profile is displayed: Phil Barnes, Email: pbarnes@abc.org, Credential type: OTN, Profession: Nurse, Last login: (account is active). The main section is titled 'eVisit Scheduling' and contains a checkbox labeled 'Ability to schedule a clinical event' which is checked. Below this, there is a text input field for 'enter a PCVC user or system name to refine the list...'. Underneath, there is a section 'Add / Remove System Associations:' with a sub-note 'expand a site (plus) to view all systems'. This section lists several systems with checkboxes: ABC Hospital (1/3), TOR_ABC_5555_ASYS_01 (0/1), TOR_ABC_5555_ASYS_02 (0/1), ABC Clinic (Virtual) (1/2), Anu Alpha, and Phil Barnes (checked). At the bottom of the form, there are two buttons: 'Continue' and 'Cancel'. An orange arrow points to the 'Continue' button.

* Continue button becomes active only after you make a change.

The screenshot shows a confirmation screen titled 'Change(s) to Scheduling Permissions and/or Access - Please Confirm'. It asks the user to 'Please confirm your changes.' Below this, there is a table with three columns: Name, Email, and Profession. The table contains one row: Phil Barnes, pbarnes@abc.org, Nurse. Below the table, it says 'Ability to schedule Clinical Events: ADDED'. At the bottom, there are two buttons: 'Submit' and 'Back'.

Managing System Associations

(the ability to schedule a system on behalf of another OTNhub user)

You can add and remove eVisit (PCVC) or room-based systems to a user's account.

When a user is associated with a system, they become a delegate for that 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.

1. To **refine the listed systems**, enter at least two characters into the search field (or to find a specific system, enter the PCVC user or system name).

For example: If the default list included all systems for UHN but you wanted to see only those systems that belonged to Toronto General Hospital, you would type TGH in the search field.

The systems list immediately changes to show only those systems that match your search criteria.

2. To **find a specific system**, locate the site in the list and click beside the site name.

This expands the list to show all its related systems.

3. To **add or remove system associations**, click the system name to select or clear each target system.

- When a site name includes the word "(Virtual)", its associated systems are eVisit accounts (PCVC).
- When a check mark appears beside the system name, the user is associated with that system.

4. To initiate the request, click **Continue**. (The Continue button becomes active only after you make a change.) A confirmation screen appears.

5. Review the information to ensure it is correct.

6. 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

Use the list below to add and remove eVisit systems for this user. When selected, the user will be able to schedule events for these systems/users in your organization.

enter a PCVC user or system name to refine the list...

Add / Remove System Associations:
expand a site (plus) to view all systems

- ABC Hospital (1/3)
 - TOR_ABC_5555_ASYS_01 (0/1)
 - TOR_ABC_5555_ASYS_02 (0/1)
- ABC Clinic (Virtual) (1/2)
 - Anu Alpha
 - Phil Barnes

Continue Cancel

Refine listed sites & systems by entering system name

Add / Remove System Associations:
expand a site (plus) to view all systems

- ABC Hospital (1/3)
 - TOR_ABC_5555_ASYS_01 (0/1)
 - TOR_ABC_5555_ASYS_02 (0/1)
- ABC Clinic (Virtual) (1/2)

Locate the site, expand the list, locate the system and apply the change

Add / Remove System Associations:
expand a site (plus) to view all systems

- ABC Hospital (1/3)
 - TOR_ABC_5555_ASYS_01 (0/1)
 - TOR_ABC_5555_ASYS_02 (0/1)
- ABC Clinic (Virtual) (1/2)
 - Anu Alpha
 - Phil Barnes

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

Please confirm your changes.

Name	Email	Profession
Phil Barnes	phil@test.ca	phil@test.ca

List of the added systems (1).

Name	Site Name
Anu Alpha	ABC Clinic (Virtual)

Submit Back

Review and submit