Accessing Service Settings

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

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

2. Click the **Services** link in the panel.

   The Services screen appears.

3. To view the eConsult options, locate the row titled **eConsult** and click its associated **Settings** icon ( ).

   The options appear underneath the eConsult row.

   - Availability
   - Maximum Cases (specialist only)
   - Notification preferences
   - Priority Regions
   - EMR access (specialist only)

4. To hide the settings, click the **Settings** icon ( ).

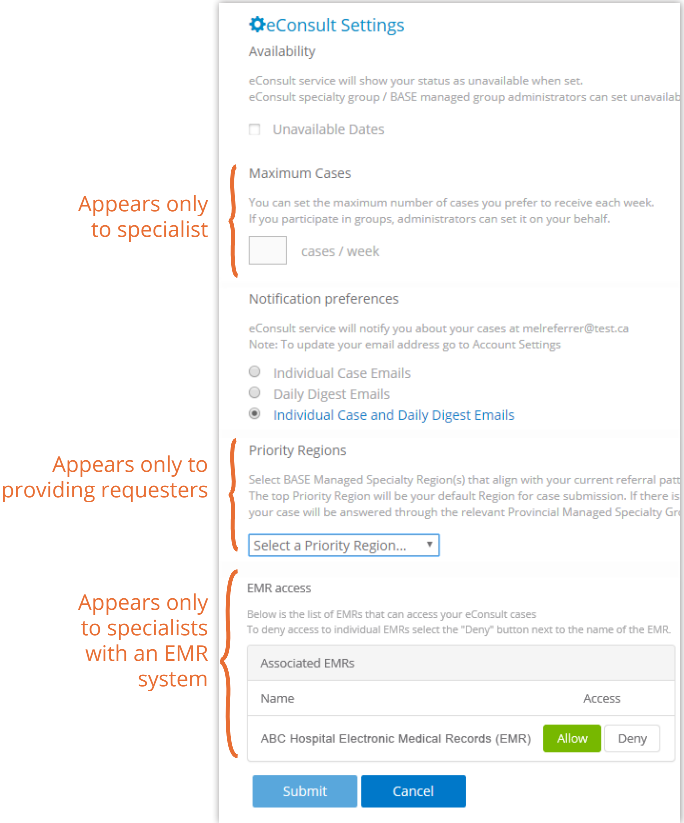

Figure 3: eConsult options

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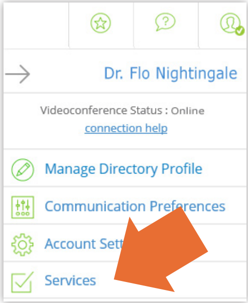

Figure 1: User panel menu

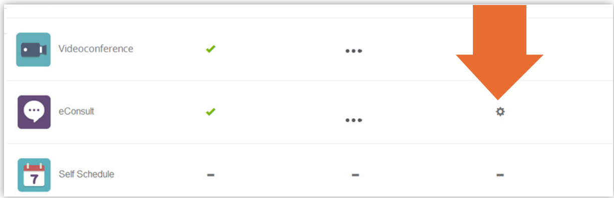

Figure 2: Videoconference settings icon

For further assistance and technical support, contact OTN Technical Support

Phone: 1-855-654-0888 **Email:** techsupport@otn.ca

Setting Availability Option

If you are going to be unavailable for a period of time, you can set an out-of-office notification.

During the out-of-office period, the specialist's name within search results appears in a red colour along with the return-to-office date.

1. To access the calendar options, click the checkbox beside the **Unavailable Dates** field.

   Start date and **End Date** fields appear.

2. To identify the **Start date**, type a date using the format yyyy-mm-dd or use the calendar widget to select a date.

   To use the calendar widget, click (📅) beside a date field and then:

   - To select a day, click the date.
   - To change the month displayed,
     - To move forward or backward one month at a time, click the arrows beside the month name – previous (❮) or next (❯).
     - To view a drop-down list of all months in the year, click the month name.
   - To change the year displayed, click the month name and then click the year in the title bar.
   - To reset the calendar widget to the current date, refresh your browser (Ctrl+F5).

3. To identify the **End date**, type a date using the format yyyy-mm-dd or use the calendar widget to select a date.

4. To save the settings, click Submit.

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

   If there is an error, an error message appears. Correct the error and try again.

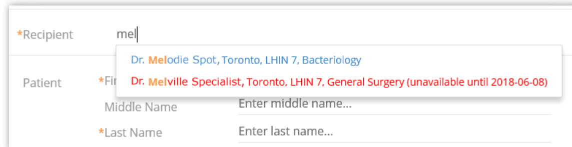

Figure 4: Specialist out-of-office notification

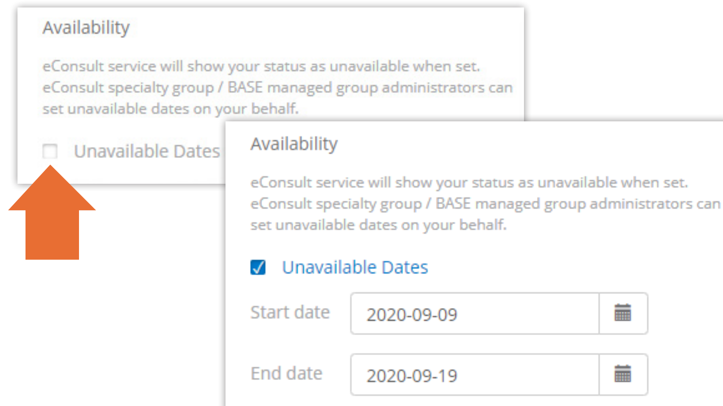

Figure 5: Availability options

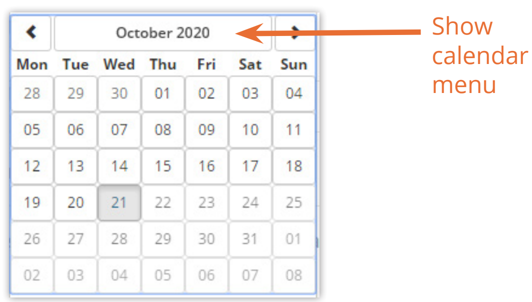

Figure 6: Calendar widget

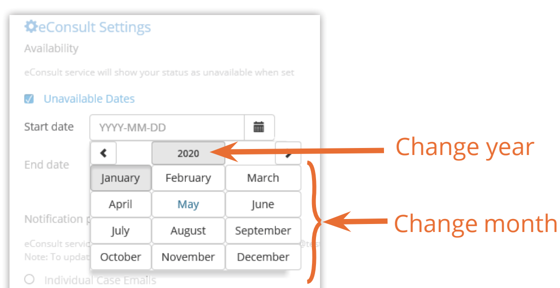

Figure 7: Calendar menu

Setting Maximum Cases Option

This section appears only to specialists or administrators of specialty groups or programs.

Use this field if a specialist will accept only a limited number of eConsult cases within a week. A week being defined as a seven day rolling count.

eConsult calculates the specialist's case load for the seven days ending at the time of case *assignment* (not the date the request was received). For example:

- eConsult case received 09:00 a.m. Friday June 7.
- Assigner reviews the case 09:00 a.m. Saturday June 8.
- Therefore, case load is based on the number of cases that were received between Sunday June 2, 12:00 a.m. and Saturday June 8, 09:00 a.m.

1. To set the **Maximum Cases**, type a number in the cases / week field.
2. To save the settings, click Submit.

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

   If there is an error, an error message appears. Correct the error and try again.

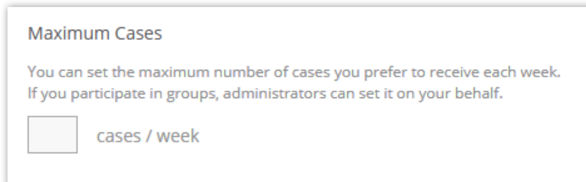

Figure 8: Maximum cases option

Setting Notification Preferences

The eConsult service will notify you about your cases using the email address you identified when you registered for the service. (To update your email address, use the Self Service feature, [My Account](#).)

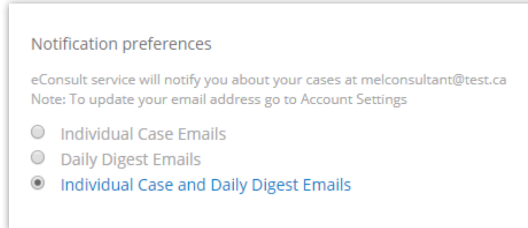

Figure 9: Notification options

Which **Individual Case Emails** you receive depends on your role. For example:

- Requesting providers receive an email each time a specialist provides a consult or requests more information.
- Specialists receive an email each time a requesting provider sends them a case.
- Assigners for a group receive an email each time a requesting provider sends a case to their group.

The details in the **Daily Digest Emails** depend on your role. For example:

- Requesting providers receive a list of cases that need their attention and cases awaiting a response from the specialist.
- Specialists receive a list of cases that need their attention.

1. By default, (◉) **Individual Case and Daily Digest Emails** is selected. If you want to receive all eConsult emails, leave this selected.
2. If you want to receive only one type of email notification, select the desired option.
3. To save the settings, click Submit.

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

   If there is an error, an error message appears. Correct the error and try again.

Setting Priority Regions

Note: If you are a delegate for another user, you cannot set their priority regions. This setting applies only to the person directly logged in to eConsult.

Priority Regions identify specific areas that offer BASE Managed Specialty Groups, where you can send an eConsult request to a group of specialists whose cases are managed by an assigner, thus increasing the odds of getting immediate access to specialty resources.

If you do not select a priority region, or if there is no specialty group in your chosen region(s), cases are answered through the relevant Provincial Managed Specialty Group.

1. To identify a Priority Region, click the **Select a Priority Region** drop-down arrow and click a name in the list.
   - The selected region appears below the selection field.
   - The first region selected is given a Priority of 1. Each additional region selected defaults with a sequence number one more than the previously selected region.
   - Each priority must be unique. That is, there can be only one priority 1, one priority 2, etc.
2. To change a selected region's priority, click its associated **Priority** drop-down arrow and select a number.
3. To delete a selected region, click its associated **Action** button.
4. To save the settings, click Submit.

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

   If there is an error, an error message appears. Correct the error and try again.

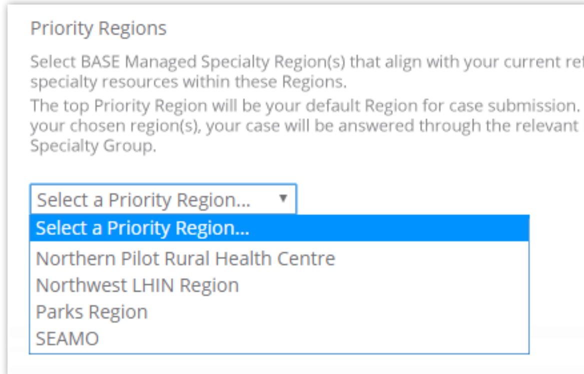

Figure 10: Priority Regions option - with drop-down list

Figure 11: Priority Regions option - after selection

Setting EMR Access

This section appears only to specialists who are associated with one or more Electronic Medical Record (EMR) systems that are set to communicate with eConsult.

This section lists all the EMRs that can access your eConsult cases.

By default, access is allowed.

Only the specialist can change their EMR access.
(That is, a delegate cannot change EMR access on behalf of a specialist.)

Denying Access to an EMR

1. To deny access to an EMR system, locate the EMR in the list and click Deny.

   The button turns orange-red (Deny).

2. To activate the change in access, click Submit.
   - If access is changed, the **Settings** screen reloads, a success message appears, and you can access cases associated with this EMR only by using eConsult.
   - If there is an error, an error message appears. Correct the error and try again.

3. If you change your mind and do not want to change the EMR access, click Cancel.

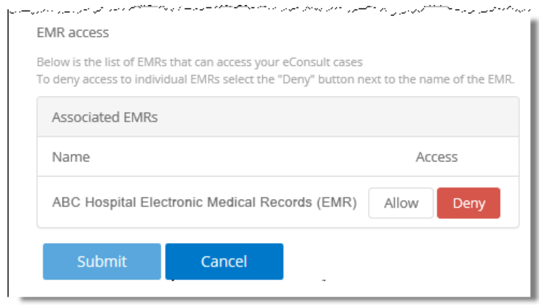

Figure 12: EMR access denied

Allowing Access to an EMR

1. To enable access to an EMR system, locate the EMR in the list and click Allow.

   The button turns green (Allow).

2. To activate the change in access, click Submit.
   - If access is changed, the **Settings** screen reloads, a success message appears, and you can access cases associated with this EMR using eConsult or the EMR.
   - If there is an error, an error message appears. Correct the error and try again.

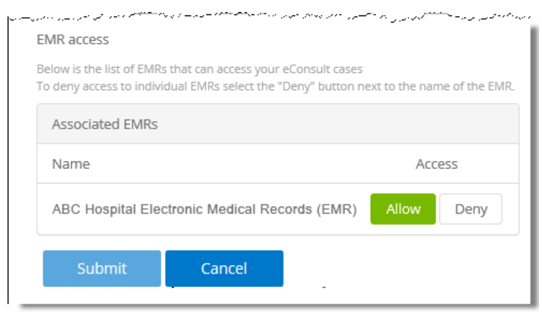

Figure 13: EMR access allowed