Updating eConsult Delegate Relationships

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 eConsult delegation relationships for users in their organization.

If you are registered with Ontario Health (OTN) as a 'primary contact' for your organization, the OTNhub User panel displays a "Manage Users" option.

The instructions below describe how an organization's PCS can manage eConsult delegate relationships for their active, Ontario Health (OTN)-registered users.

A specialist or referrer can have one or more delegates associated with their eConsult service.
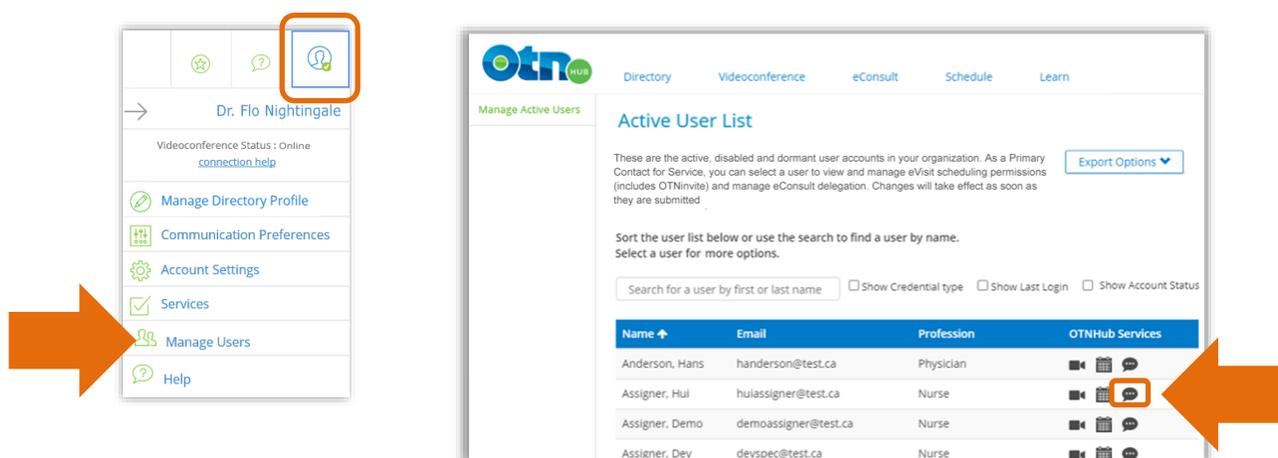
eConsult Delegator

An eConsult delegator is a health care professional who may submit an eConsult request and/or respond to eConsult requests. See Managing eConsult Delegators.

eConsult Delegate*

An eConsult delegate is someone who can act on behalf of their specialist or referrer (delegator). Once assigned as a delegate, that person has the same eConsult dashboard view and can perform the same functions as the specialist or referrer who delegated them. See Managing eConsult Delegates.

Accessing the Manage Users Feature and Locating a User

1. Sign in at otnhub.ca and 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 **eConsult** icon for that user. An **eConsult Delegation** screen appears.

* NOTE: eConsult delegates have access to personal health information (PHI) and eConsult case content on behalf of their delegator and the member organization. Delegate access to PHI is subject to the Personal Health Information Protection Act, 2004.

Managing eConsult Delegates

You can change eConsult delegate relationships only for "active" users in your organization.

Delegate search results will include users who do not have access as a referrer or specialist. The delegate search will generally include registered nurses, registered practical nurses, telemedicine coordinators, medical students, medical residents, fellows, and health care administrators.

When the selected user has a dormant account (that is, when the user has not accessed their account in over 6 months):

- If the user account info (*e.g.*, name and contact email) is still valid, advise the user to log into their account to bring it out of dormancy.
- Otherwise, if you wish to deactivate the account, send an email request to ContactUpdates@otn.ca

The **eConsult Delegation** form allows you to add or remove delegates for a referrer or specialist.

Search for and add a delegate

Remove a delegate
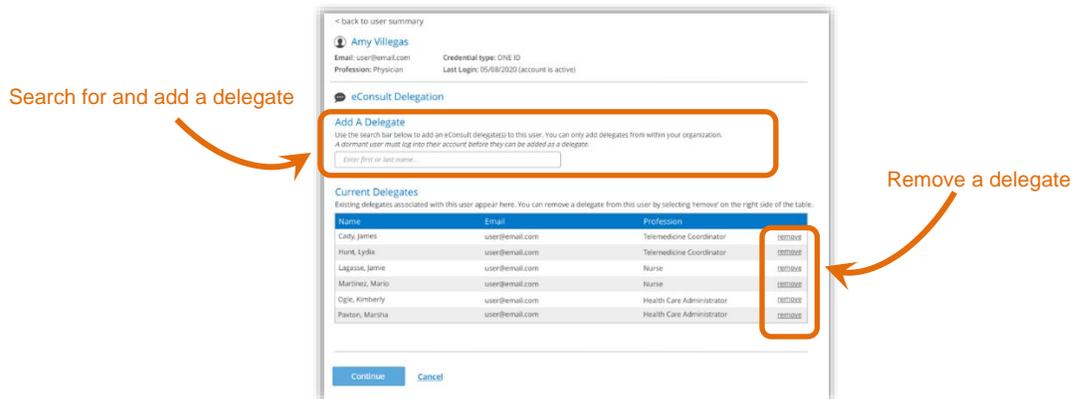
Adding a Delegate

1. To search for a user, type two to three characters of the last or first name, or contact email in the **Add a Delegate** field. Matching names appear in alphabetical order by last name, and then first name.

   Delegates with an active OTNhub account (not dormant) in the same organization as the PCS may be included in the search results.

2. Click the desired name in the drop-down list.

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

3. To add more delegates, repeat steps #1 and-#2.

4. Review the **To Be Added** list for accuracy.

5. To remove a potential delegate from the list, click its associated "delete" link.
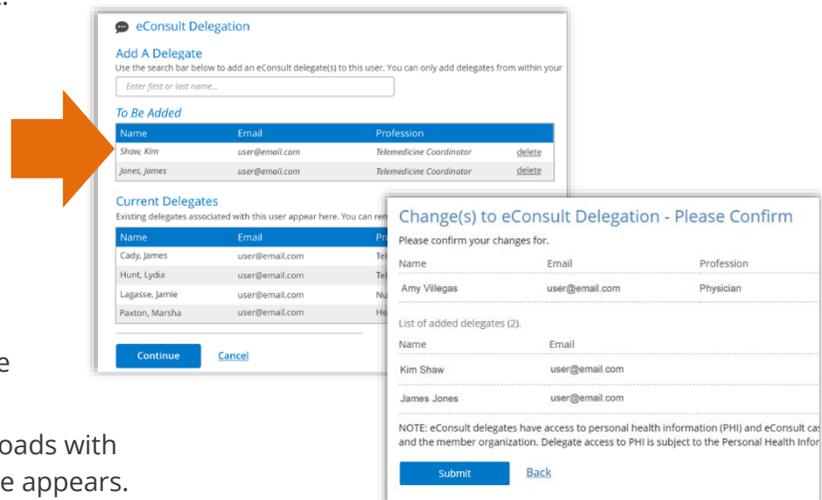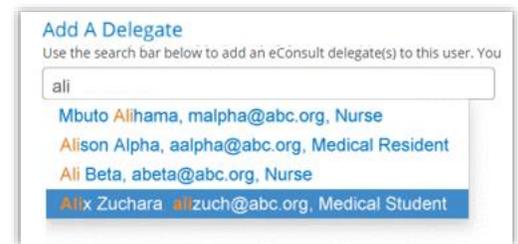
6. To initiate the request, click [Continue].

   A confirmation screen appears.

7. Review the information to ensure it is correct.

8. To **confirm** the change and immediately update the user's account, click [Submit].

   If all is okay, the eConsult Delegation screen reloads with the updated information and a success message appears.

   The changes take effect immediately.

Removing a Delegate

1. Locate the desired user in the **Current Delegates** list and click its associated "**remove**" link.

    The user's list-item changes to a light grey colour and the remove link changes to "undo".

2. If you need to cancel the action and reset the user, click the "**undo**" link.

3. To initiate the request, click Continue.

    A confirmation screen appears.

4. Review the information to ensure it is correct.

5. To **confirm** the change and immediately update the user's account, click Submit.

    If all is okay, the eConsult Delegation screen reloads with the updated information and a success message appears.

    The changes take effect immediately.

Managing eConsult Delegators

You can change eConsult delegate relationships only for "active" users in your organization.

The **eConsult Delegation** form allows you to add or remove delegators for a user.

Note: Delegator search results will include only users who have access as a referrer or specialist.

Search for and add a delegator

Remove a delegator
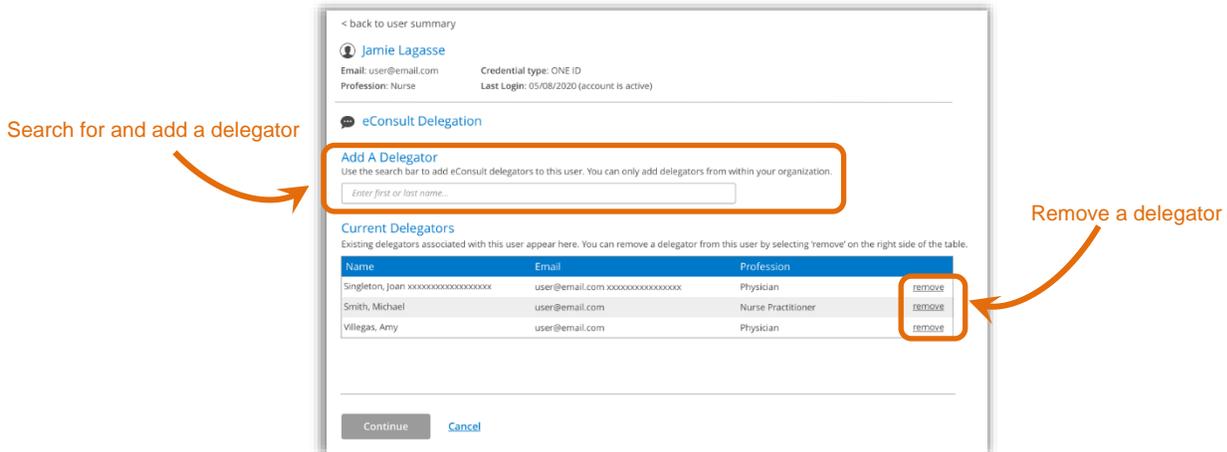
Adding a Delegator

1. To search for a user, type two to three characters of the last or first name, or contact email in the **Add a Delegator** field. Matching names appear in alphabetical order by last name, and then first name.

   An eConsult referrer or specialist with an active OTNhub account (not dormant) in the same organization as the PCS may be included in the search results.
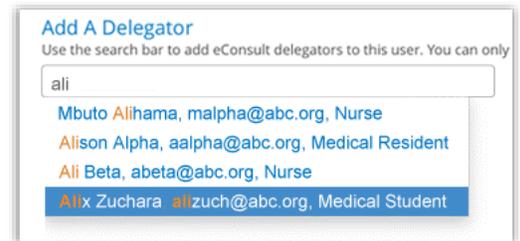
2. Click the desired name in the drop-down list.

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

3. To add more delegators, repeat steps #1 and-#2.

4. Review the **To Be Added** list for accuracy.

5. To remove a potential delegator from the list, click its associated "delete" link.

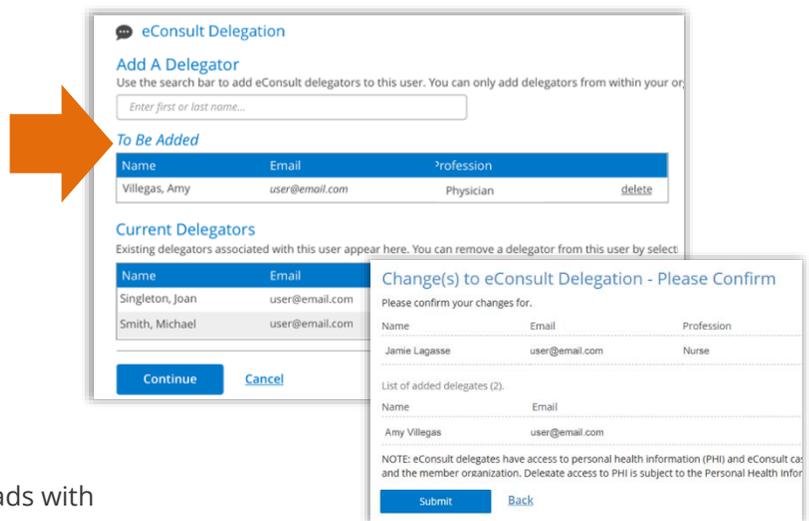6. To initiate the request, click Continue.

   A confirmation screen appears.

7. Review the information to ensure it is correct.

8. To **confirm** the change and immediately update user's account, click Submit.

   If all is okay, the eConsult Delegation screen reloads with the updated information and a success message appears.

   The changes take effect immediately.

Removing a Delegator

1. Locate the desired user in the **Current Delegators** list and click its associated "**remove**" link.

   The user's list-item changes to a light grey colour and the remove link changes to "undo".

2. If you need to cancel the action and reset the user, click the "**undo**" link.

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

   A confirmation screen appears.

4. Review the information to ensure it is correct.

5. To **confirm** the change and immediately update the user's account, click **Submit**.

   If all is okay, the eConsult Delegation screen reloads with the updated information and a success message appears.

   The changes take effect immediately.