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 <u>Managing eConsult Delegators</u>.

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 <u>Managing eConsult Delegates</u>.

Accessing the Manage Users Feature and Locating a User

- 1. Sign in at <u>otnhub.ca</u>[®] 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 **p** for that user. An **eConsult Delegation** screen appears.

Manage Users Name + Email Profession OTNHub Services Image Users Anderson, Hans handerson@test.ca Physician Image III (Profession)	Manage Directory Profile Communication Preferences Account Settings Services	Contact for Serviv (includes OTNinv they are submitte Sort the user li Select a user for Search for a	ce, you can select a user to view ite) and manage eConsult deleg d is below or use the search to pr more options. user by first or last name	and manage eVisit scheduling permissic ation. Changes will take effect as soon a o find a user by name.	is
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		Anderson, Har	ns handerson@test.ca	Physician	■ 🗎 🗭

* 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.

earch for and add a delegate	eConsult Delegation	Processor represent unit cape, does Add (actour is acree) Consult Delegation					
	Add A Delegate Use the search bar below to add. A dormant user must log into the Enter first or last name	an eConsult delegate(s) to this user. You can only a ir account before they can be added as a delegate.	Id delegates from within your organization.		Demons e dele se		
,	Current Delegates		usta fease this used in colorities becaused on the de	der side of the table	Remove a delega		
	Existing delegates associated w	th this user appear here. You can remove a dele	pare indiminist user by selecting remove on the rig	grit side of the table.			
	Name	th this user appear here. You can remove a dele Email	Profession	nt sue or sie table.			
	Name Cady, James	th this user appear here. You can remove a dele Email user@email.com	Profession Telemedicine Coordinator	remeve			
	Existing delegates associated w Name Cady, James Hunt, Lydia	th this user appear here. You can remove a dele Email user@email.com user@email.com	Profession Telemedicine Coordinator Telemedicine Coordinator	remove remove			
	Existing delegates associated w Name Cody, James Hunt, Lydia Lagasse, Jamie	th this user appear here. You can remove a dele Email user@email.com user@email.com user@email.com	Profession Profession Telemedicine Coordinator Telemedicine Coordinator Narse	temove remove			
	Eosting delegates associated w Name Cody, James Hunt, Lydia Lagasse, Jame Martinez, Mario	in this user appear here, vuo can remove a dele Email user@email.com user@email.com user@email.com user@email.com	Profession Profession Telemedicine Coordinator Telemedicine Coordinator Nurse Nurse	remove remove remove remove			

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.

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

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

- 3. To add more delegates, repeat steps #1 and-#2.
- Review the To Be Added list for accuracy. 4.
- To remove a potential delegate from the list, 5 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.







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".

Current Delegates Existing delegates associated wit	Current Delegates Existing delegates associated with this user appear here. You can remove a delegate from this user by selecting 'remove' on the right side of the				
Name	Email	Profession			
Cady, James	user@email.com	Telemedicine Coordinator	remove		
Hunt, Lydia	user@email.com	Telemedicine Coordinator	remove		
Lagasse, Jamie	user@email.com	Nurse	remove		
Martinez, Mario	user@email.com	Nurse	undo		
Ogle, Kimberly	user@email.com	Health Care Administrator	<u>remove</u>		
Paxton, Marsha	user@email.com	Health Care Administrator	remove		

- 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.

Name	Email	Profession
Amy Villegas	user@email.com	Physician
List of removed deleg	ates (1).	
Name	Email	
Mario Martinez	user@email.com	
NOTE: eConsult deleg	ates have access to personal health	n information (PHI) and eConsult ca

- 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.

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	 back to user summary jamie Lagasse Emait: user@email.com Profession: Nurse Last Lo Creden Consult Delegation Add A Delegator Use the search bar to add e Consult deleg Enter first or last name 	tial type: ONE ID gm: 05/08/2020 (account is active) ators to this user. You can only add delegators	from within your organization.		
,	Current Delegators Existing delegators associated with this u	ser appear here. You can remove a delegator fr	om this user by selecting 'remove' on th	he right side of the table.	Remove a delegator
	Name	Email	Profession		
	Singleton, Joan xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	user@email.com x000000000000000000000000000000000000	Physician	remove	
	Smith, Michael	user@email.com	Nurse Practitioner	remove	
	Villegas, Amy	user@email.com	Physician	remove	
	Continue <u>Cancel</u>				

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.



Enter first or last na	me				
To Be Added					
Name	Email	Profession			
Villegas, Amy	user@email.com	Physician		delete	
Existing delegators as Name Singleton, Joan	ssociated with this user appe Email user@email.com	ear here. You can remove a Change(s) to eCo Please confirm your change	delegator from this us DNSUlt Delegat 15 for.	er by selecti ion - Ple	ase Con
Existing delegators as Name Singleton, Joan Smith, Michael	ssociated with this user apper Email user@email.com user@email.com	change(s) to eCo Please confirm your change Name	delegator from this us DNSULT Delegat es for. Email	er by selecti ion - Ple	ase Cont
Existing delegators as Name Singleton, Joan Smith, Michael	Email user@email.com user@email.com	ear here. You can remove a Change(s) to eCu Please confirm your change Name Jamie Lagasse	delegator from this us DISUIT Delegat es for. Email user@email.com	er by selecti ion - Ple	ase Cont Profession Nurse
Existing delegators at Name Singleton, Joan Smith, Michael Continue	Email User@email.com user@email.com	car here. You can remove a Change(s) to eCo Please confirm your change Name Jamie Lagasse List of added delegates (2).	delegator from this us DISULT Delegat is for. Email user@email.com	er by selecti	ase Cont Profession Nurse
Existing delegators at Name Singleton, Joan Smith, Michael Continue	sociated with this user appe Email user@email.com user@email.com <u>Cancel</u>	ear here. You can remove a Change(s) to eCo Please confirm your change Name Jamie Lagasse List of added delegates (2). Name	delegator from this us onsult Delegat is for. Email user@email.com Email	er by selecti ion - Ple	ase Cont Profession Nurse
Existing delegators at Name Singleton, Joan Smith, Michael	sociated with this user appe Email user@email.com user@email.com <u>Cancel</u>	change(s) to eCt Please confirm your change Name Jamie Lagasse List of added delegates (2). Name	delegator from this us onsult Delegat es for. Email user@email.com Email	er by selecti ion - Ple	Profession

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".

Current Delegators Existing delegators associated w	vith this user appear here. You can remove a del	egator from this user by selecting 'remove' on th	ne right side of the table
Name	Email	Profession	
Singleton, Joan	user@email.com	Physician	remove
Smith, Michael	user@email.com	Nurse Practitioner	remove
Villegas, Amy	user@email.com	Physician	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.

Name	Email	Profession
Jamie Lagasse	user@email.com	Nurse
List of removed delegal	tors (1).	
Name	Email	
Amy Villegas	user@email.com	
NOTE: eConsult delega	tes have access to personal health	n information (PHI) and eConsult ca

- 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.