

Updating a Directory Profile

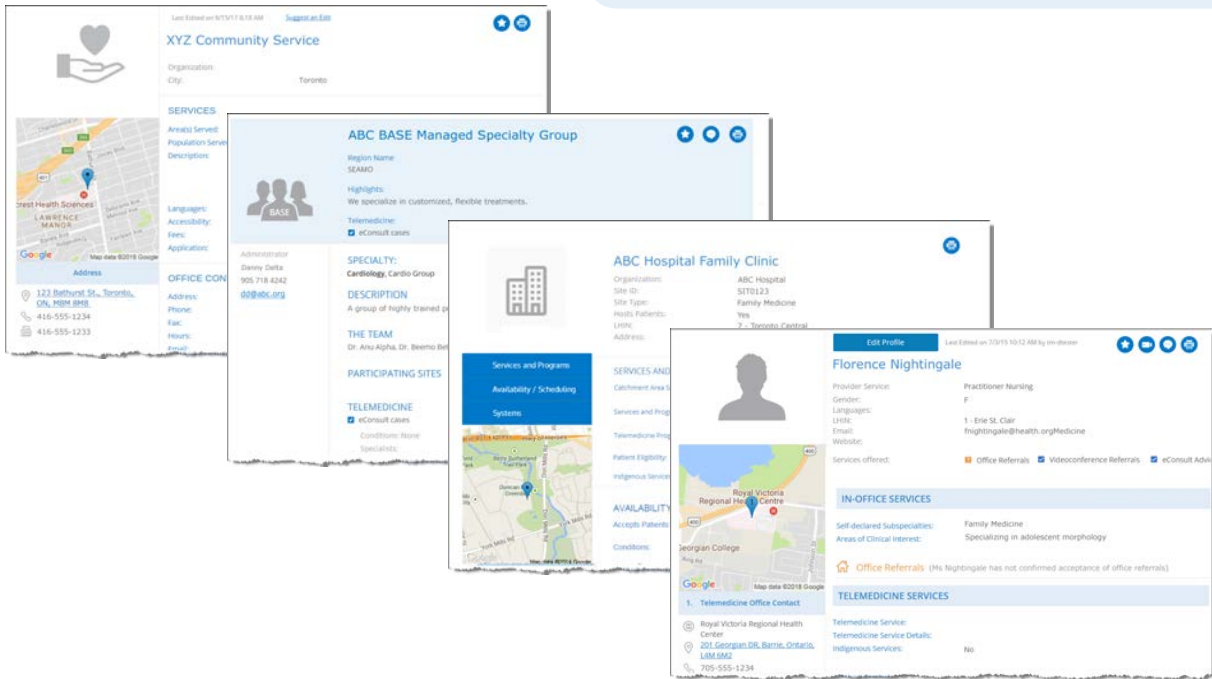
These instructions describe how to access and update an OTN **Directory profile** for a site, person, program/group or your personal directory entry. This is the information published in the OTN Directory and available for searching and viewing by all registered directory users.

You can update your own profile and other profiles for a **person, site, or group** for which you have administrative permissions.

Note: Your 'directory profile' is not the same as your OTN 'account information'. (Account information is for OTN internal purposes only and is not available to the public. There are separate instructions for [updating your account information](#).)

Table of Contents

- People Profiles**
 - Accessing Your Directory Profile..... 2
 - Editing a Person Profile 3
 - Fields Available for Editing Within a Person Profile 3
- Telemedicine Site Profiles**
 - Accessing a Site Profile 10
 - Editing a Site Profile 11
 - Fields Available for Editing Within a Site Profile 11
- Group, Program, or BASE Managed Specialty Group Profiles**
 - Accessing a Group, Program, or BASE Managed Specialty Group Profile..... 14
- Community Service Profiles**
 - Accessing a Community Service Profile..... 15
- Managing Clinical Protocol Attachments and Links**
 - Accessing Clinical Protocols Fields 17
 - Adding a File or Link..... 18
 - Editing a Link or Display Name..... 19
 - Deleting a File or Link..... 20



For further assistance and technical support, contact OTN Technical Support

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



People Profiles

Accessing Your Directory Profile

If you are registered to use the Directory and you have a published profile, you can access your profile using the **Edit Directory Profile** link included in the profile/self-service panel.

Delegates for a profile owner can also edit the profile.

You can edit most fields within your own **Directory profile**, with the following exceptions:

- To update CPSO fields, you need to contact the [The College of Physicians and Surgeons of Ontario](#).
- To update read-only fields, you need to contact the OTN Customer Care Centre.
- Physicians not registered with OTN can [register with OTN](#) for an OTNhub account.

Updating your own profile

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 **Edit Directory Profile** link in the panel.
Your **Edit Profile Details** screen appears with **Save** and **Cancel** buttons at the top.

Updating another person's profile

1. Sign in at [otnhub.ca](#) and go to the **Directory** service.
2. [Search for the person](#) and locate their name in the results list and click the name to display the [profile details](#).

The **Profile Details** screen appears with an **Edit Profile** button at the top.

If an **Edit Profile** button does not appear, you do not have administrative rights.

3. To open the profile details with fields available for edit, click the **Edit Profile** button.

The **Edit Profile Details** screen appears with **Save** and **Cancel** buttons at the top.

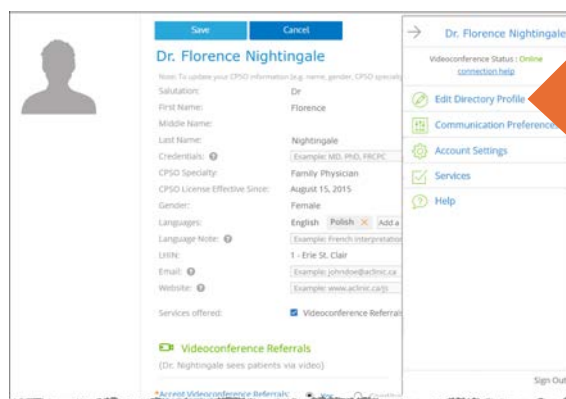


Figure 1: Edit your own profile

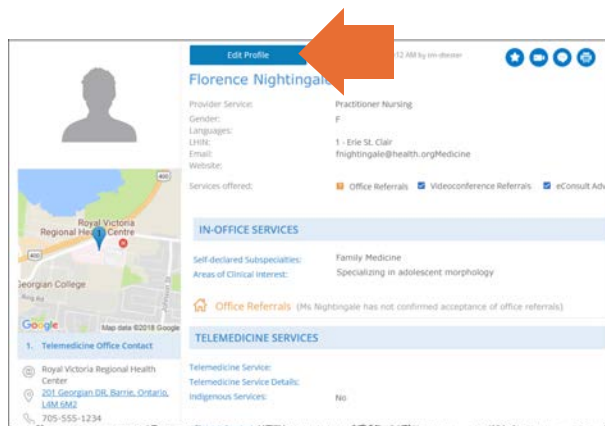


Figure 2: Edit another person's profile



If you need administrative permissions to edit a profile, contact your organization's OTN Primary Contact or your OTN Account Manager.

Editing a Person Profile

Note: Your 'directory profile' is not the same as your OTN 'account information'. (Account information is for OTN internal purposes only and is not available to the public. There are separate instructions for [updating your account information](#).)

1. After you make your changes, click **Save*** at the top of the form. Your information is validated and if all is okay:
 - The updated profile information is saved.
 - The **Profile Details** screen reloads with a success message.
 - The updates are immediately published to the Directory. (Note: If your profile was previously not published, the act of saving publishes it in the Directory.)

If there is an error, an error message appears and your information is not changed. Correct the error and try again.

2. If you change your mind and do not want to apply the changes, click **Cancel** at the top of the form.

Figure 3: Edit person profile details

Fields Available for Editing Within a Person Profile

The following tables contain fields that you can edit—in order of appearance within the Edit Profile screen. (Note: Fields that you cannot edit are not listed in these tables.)

Field Name	Description
General Information	
Credentials	If you want to have credentials appear after your name (in the search results list and your profile details), type the credential initials here. For example: MD, PhD, FRCPC
Languages	The Languages field can include both fields that you cannot edit and editable fields. For physicians registered with the CPSO, the Language field is pre-populated with data from their CPSO information and you cannot edit it. You can edit a language that you have added yourself. If you offer service in other languages besides English, list them here. For example: French or Tagalog. To add a language, click the field drop-down arrow and select one or more languages from the list.
Language Note	Additional details about languages offered, translation services your organization provides and how to access them.
Email	The email address to receive referrals, profile updates, service or data-related inquiries. Typically this is your email address or your administrator/delegate's email address.
Website	The URL where interested users can find more information about you and your services.

Continued next page...

* Only after you change the contents of a field or add content to an empty field will the **Save** button become active (turn a darker shade of blue and can be clicked).



Field Name	Description
In-Office services	
Note: This section is available only for specialists in Toronto Central LHIN 7 as part of a pilot project.	
Self-declared Subspecialties	Select from the drop-down list one or more subspecialties you want listed in your profile. List only those you are professionally certified to provide.
Areas of Clinical Interest	Provide additional details about your specific areas of care that can help primary care providers learn more about your scope of practice for accepting patients and ensure you receive the correct referral type. For example: <ul style="list-style-type: none"> Your practice focus within the specialty. Any restrictions for the type of patients you see or the catchment area you serve. Any non-OHIP services you offer.
Primary Practice for Office Referrals	
Note: The fields in this section are location specific. That is, if you have more than one practice location, you need to provide this information separately for each practice location.	
Accept Office Referrals	Identify if you accept referrals to see patients in your office.
Average Wait Time	Select the approximate time between the date when you receive a referral request and the date an appointment can be booked.
Accommodate Urgent Cases	Identify whether you accept urgent cases. If yes, provide additional details in the Urgent Case Note field.
Urgent Cases Note	Approximate wait times and specific referral conditions under which you accept urgent cases. You can also include instructions for how to submit an urgent request. For example, urgent cases will be seen within 5 business days.
Accepted Types	Select whether you will see only first-time patients or only patients for follow-up appointments or both.
Patient Eligibility	Restrictions or criteria (if any) for the patients who can be referred to you. These can include age, gender, requirement for medical history, current health status, etc. For example, only see patients above age 16.
Only Accepted from Regions	Restrictions (if any) for specific geographical areas from which you accept referrals such as LHIN or region, sub-regions, district, city, etc. For example, patient must reside in Scarborough.

Continued next page...

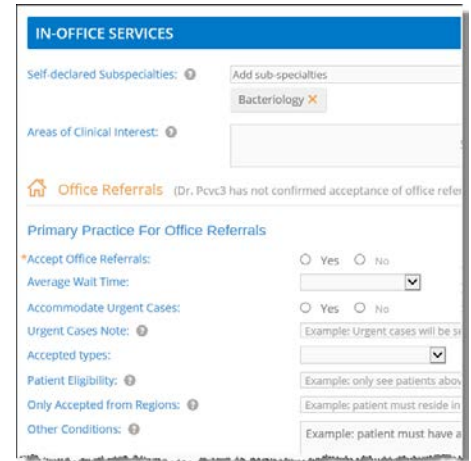


Figure 4: Profile > in-office services



Field Name	Description
Other Conditions	Other restrictions (if any) under which you will accept office referrals from other healthcare providers. For example, patient must have a family physician.
Availability	Restrictions for the dates or times during which you can provide consultations. For example, available only Tuesdays and Thursdays.
Referral Process	Enter all relevant procedural details on your referral process that a primary care provider must know when referring a patient to you. Details can help eliminate the back-and-forth between your two offices. For example: <ul style="list-style-type: none"> The type of material that should accompany the referral, such as lab work, imaging, previous treatment, etc. How long before the primary care office might hear back from you. Who will contact/follow-up with patients about the appointments (your office or the referrer's office). Any special referral form and whether it's mandatory or optional.
Clinical Protocols and Forms	These are procedural documents and forms for use by patient sites to help them properly prepare for and conduct a clinical session with you, the specialist. If you have documents that contain detailed clinical protocols or forms, you can: <ul style="list-style-type: none"> Publish links to these documents in your Directory profile, which users can click to access. (If the files are available from an existing web site or Internet location.) Attach files to your Directory profile, which users can view or download. <p>You can add, delete or edit protocols from the View Profile Details page. (If you are in edit mode, save your changes and scroll down in the profile details to the "Clinical protocols" section. Click "Add New".)</p>
Office Contact	This is contact information provided by a physician's CPSO registration. You cannot edit most of the fields in this section. To update CPSO fields, you need to contact the The College of Physicians and Surgeons of Ontario . Within these contacts fields, you might be able to edit the phone and fax number fields. For example, with a secondary practice location or if the CPSO registration does not have a phone or fax number.

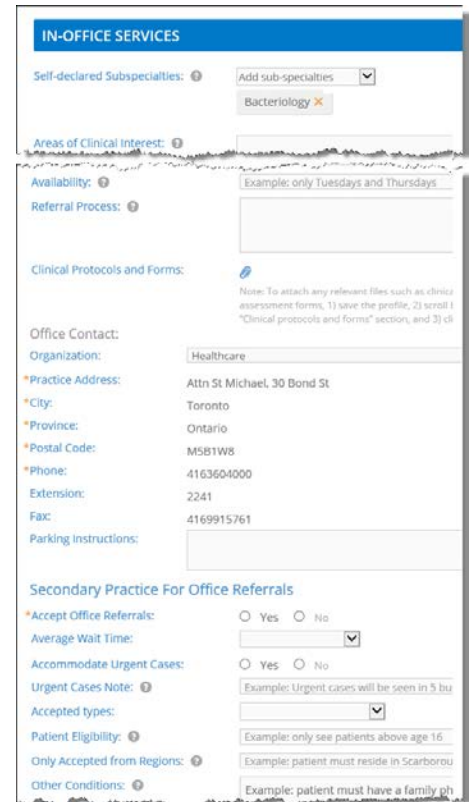


Figure 5: Profile > in-office services

Continued next page...



Field Name	Description
Telemedicine Services	
Telemedicine Service	Select from the drop-down list one or more specialties for which you offer telemedicine services.
Telemedicine Service Details	If there is specific information about your telemedicine service that you would like to describe, type it in this field.
Indigenous Services	Indicates whether you offer culturally appropriate patient services to the Indigenous population. Defaults to 'No'. When set to 'Yes', it lets First Nations/Metis communities know they can connect with you for services that consider their cultural sensitivities. Only OTN can edit this field. You can apply to OTN to have your profile updated with this set to 'Yes'. (See the Indigenous Services FAQ for details.)
Videoconference Referrals	
Note: These fields appear only if you are a registered Videoconference user.	
Accepts Videoconference Referrals	Select the option that best describes the your status for accepting patients for telemedicine videoconferencing. If you select conditional, describe the conditions in the Other Conditions field.
Average Wait Time	Select the approximate time between the date when you receive a referral request and the date an appointment can be booked.
Accepted Types	Select whether you will see only first-time patients or only patients for follow-up appointments or both.
Patient Eligibility	Describe any specific criteria for patients that can be referred to you for videoconferencing. For example: Only pediatric patients.
Only Accepted from Sites / Regions	If you will accept videoconference referrals only from specific areas, identify them here. For example, a LHIN number, region or district name, or specific site name or number.
Other Conditions	If there are specific conditions under which you will accept referrals for video consults, describe each condition. For example: Must have family doctor.

Continued next page...

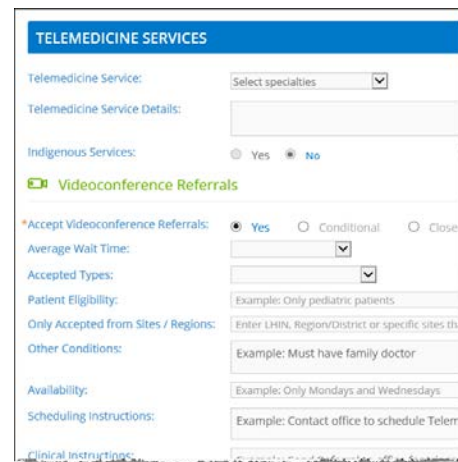


Figure 6: Profile Videoconference service



Field Name	Description
Availability	If you are available for video consults only on specific days or during specific times, describe the limitations. For example: Only Mondays and Wednesdays.
Scheduling Instructions	If you have any processes or rules in place for scheduling a video consult, describe them here. For example: Call the telemedicine contact for inquiries regarding this intake process.
Clinical Instructions	If you have any processes or rules in place for your clinical events, describe them here. For example: Send referral to office for triage by consultant.
Clinical Protocols and Forms	<p>These are procedural documents and forms for use by patient sites to help them properly prepare for and conduct a clinical session with you.</p> <p>If you have documents that contain detailed clinical protocols or forms, you can:</p> <ul style="list-style-type: none"> • Publish links to these documents in your Directory profile, which users can click to access. (If the files are available from an existing web site or Internet location.) • Attach files to your Directory profile, which users can view or download. <p>You can add, delete or edit protocols from the View Profile Details page. (Save your changes and in the profile details, scroll down to the “Clinical protocols” section and click Add New.)</p>
Telemedicine Contacts	<p>Contact information (name, phone, fax, and email) of the person to be contacted regarding the video consult.</p> <p>You can add, delete or edit telemedicine contacts from the View Profile Details page. (Save your changes and in the profile details, scroll down to the “Telemedicine Contacts” section and click Add New.)</p>
Patient Site Requirements	<p>Support and Resources</p> <ul style="list-style-type: none"> • If you require that the patient site have specific support or resource requirements for a video consult, describe your requirements. • For example: Nursing support required for the full duration of the consult. Or patient physical assessment is required, specifically, medications list, height and weight measurements.
Medical Peripherals	<ul style="list-style-type: none"> • If you have peripheral devices that you use for videoconferencing, select all the devices that apply.

Continued next page...

Figure 7: Profile Videoconference service



Field Name	Description
eConsult Advice	
Note: These fields appear only if you are a registered eConsult user.	
Accept eConsult Requests	Select the option that best describes the your status for accepting eConsult requests.
Patient Eligibility	Describe any specific criteria for patients that can be referred to you for advice via eConsult. For example: Only pediatric patients.
Only Accepted from Sites / Regions	If you will accept eConsult requests only from specific areas, identify them here. For example, a LHIN number, region or district name, or specific site name or number.
Other Conditions	If there are specific conditions under which you will accept eConsult requests, type a description of each condition. For example: Must have family doctor.
Associated Groups	Lists all groups, programs, and BASE managed specialties with which you are associated. The group/program name is a link to their Directory profile. If you want to be removed from a group/program, contact the group/program's administrator. The administrator is indicated in the group/program's directory profile.
Telemedicine Practice Address	
The practice address is the physical location of the your primary office. This is the published address that is available to healthcare providers searching the Directory and is used to generate the Google map accessed from the Directory. Note: Although it might be the same address as that used in your OTN account, changing the address for your profile will not update your OTN account address.	
Address	The street name and civic number of your primary office. Also include here the unit, floor, suite, or apartment number of the consultant's primary office.
City	The city name where your primary office is located.
Province	The province name where your primary office is located.
Postal Code	The postal code of your primary office. For example: A3A 3A3.

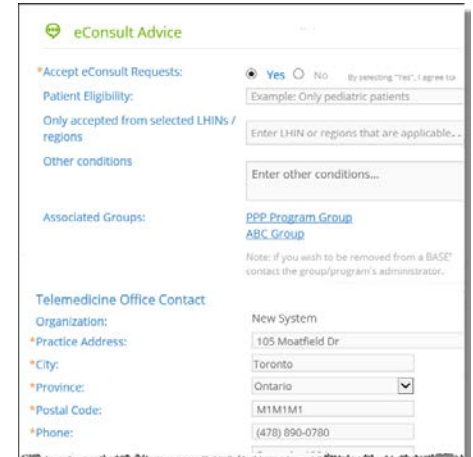


Figure 8: Profile eConsult service

Continued next page...



Field Name	Description
Phone	The 10-digit office telephone number of your primary office. For example: 416-555-1234.
Extension	Office phone extension.
Fax	The 10-digit fax number of your primary office. For example: 416-555-9876. This number might be used to fax patient information, therefore do not use a fax machine that is in a public area.
Parking Instructions	If there are specific parking instructions for people visiting your office, describe them here.

About
<p>If you want to publish information about your medical qualifications and professional memberships, you can describe them using these fields.</p> <ul style="list-style-type: none"> • Practicing Since • Affiliations • Professional Memberships • Medical School • Graduate School • Internship • Residency • Fellowships • Publications



Telemedicine Site Profiles

Accessing a Site Profile

You can update information in the site profile if:

- You are the primary contact for the service or you have been granted administrative rights and;
- The site is published in the Directory.

1. Sign in at otnhub.ca and go to the **Directory** service.
2. [Search for the site](#) and locate the site name in the results list and click the name to display the [profile details](#).

The **Profile Details** screen appears with an **Edit Profile** button at the top.

If an **Edit Profile** button does not appear, you do not have administrative rights.

3. To open the site's profile details with fields available for edit, click the **Edit Profile** button. The site's **Edit Profile Details** screen appears with **Save** and **Cancel** buttons at the top.

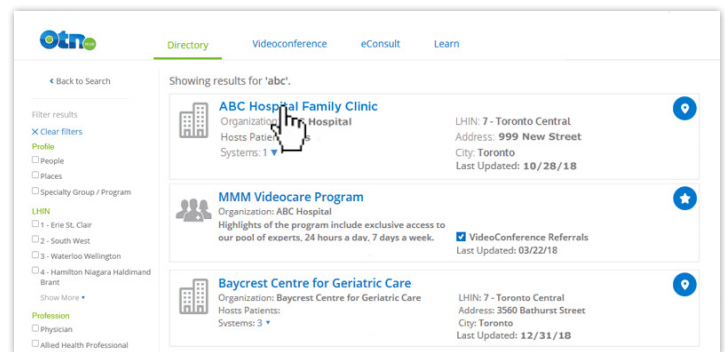


Figure 9: Directory search

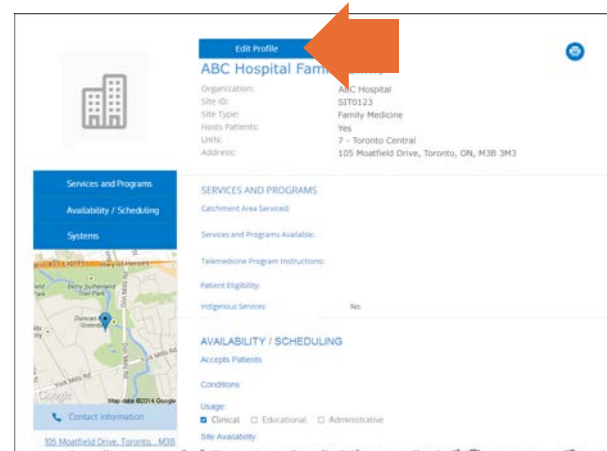


Figure 10: Site profile details



If you need administrative permissions to edit a profile, contact your organization's OTN Primary Contact or your OTN Account Manager.

Editing a Site Profile

You can edit most fields within a profile for which you have administrative rights.

1. After you make your changes, click **Save*** at the top of the form. The site information is validated and if all is okay:
 - The **Profile Details** screen reloads with a success message.
 - The updates are immediately published to the Directory. (Note: If the profile was previously not published, the act of saving publishes it to the Directory.)

If there is an error, an error message appears and your information is not changed. Correct the error and try again.

2. If you change your mind and do not want to apply the changes, click **Cancel** at the top of the form.

If a field is not available for editing, to change the field you need to send an email with your request to contactupdate@otn.ca.

Figure 11: Edit site profile details

Fields Available for Editing Within a Site Profile

The following tables contain fields that you can edit—in order of appearance within the Edit Profile screen. (Note: Fields that you cannot edit are not listed in these tables.)

Field Name	Description
Services and Programs	
Catchment Area Served	The geographical district(s) from which the site will accept patients/clients. For example: All of Ontario.
Services and Programs Available	List the general programs, services, or therapeutic areas of care available via telemedicine at the site. For example: Geriatric Mental Health or Cardiology.
Telemedicine Program Instructions	Describe any specific information and instructions for participating in a particular telemedicine program offered at the site.
Patient Eligibility	Describe the criteria for hosting patients. For example: Accepts only patients who are currently registered with the clinic.
Indigenous Services	Indicates whether the site offers culturally appropriate patient services to the Indigenous population. Defaults to 'No'. When set to 'Yes', it lets First Nations/Metis communities know they can connect with the site for services that consider their cultural sensitivities. Only OTN can edit this indicator. You can apply to OTN to have the site profile updated with this set to 'Yes'. (See the Indigenous Services FAQ for details.)

Continued next page...

* Only after you change the contents of a field or add content to an empty field will the **Save** button become active (turn a darker shade of blue and can be clicked).



Field Name	Description
Availability / Scheduling	
Hosts Patients	Select the option that best describes the site's status for accepting patients for telemedicine. If you select conditional, describe the conditions in the Conditions field.
Conditions	If there are specific conditions under which the site will accept referrals for video consults, type a description of each condition. For example: Must be able to walk up four stairs.
Site Availability	If the site is available for telemedicine only on specific days or during specific times, describe the limitations. For example: Only Mondays and Wednesdays.
Scheduling Instructions	Describe any instructions required to schedule a telemedicine appointment with the site. For example: This site uses Ncompass scheduling to book patient appointment times and video systems. Ncompass is updated with all available times per system so please email the telemedicine contact to request videoconference system time.
Referral Instructions	If the site has any processes or rules in place for telemedicine events, describe them here.
Clinical Protocols and Forms	Clinical protocols are procedural documents and forms provided by healthcare providers, sites, or programs. These protocols can be instructions, explanations, or questionnaires intended to help the patient or referring physician understand what is required for a clinical telemedicine session. This in turn helps the healthcare provider and the host site to properly prepare for and conduct the session. A site might have general protocols but can also have protocols that apply to specific consultants who present at the site. If you have clinical protocols or forms, you can: <ul style="list-style-type: none"> • Publish links to these documents in the site's profile, which users can click to access. (If the files are available from an existing web site or Internet location.) • Attach files to the site's profile for users to view or download. You can add, delete or edit protocols from the View Profile Details page. (If you are in 'edit' mode, save the changes and scroll down in the profile details to the "Clinical protocols" section. Click Add New or a Delete icon (🗑️) or an Edit icon (✎).
Healthcare Professionals Available	If the site offers nursing support for video consults, select the Nursing Support check box.
Telemedicine Contacts	Contact information (name, title, phone and fax) of the person(s) to be contacted regarding the telemedicine events at this site. If you need to add, change or delete contact information related to a site, email ContactUpdates@otn.ca .

Continued next page...

Field Name	Description
Systems	
System Name	A read-only field. An OTN-assigned unique character set that identifies a specific system and contains the Site ID of its parent site.
Room Name	If the room has a designated name to identify it within the site, type it here. For example, Room 321 or Clinical Studio.
Room Description	Describe the room that houses the system, such as its capacity, location, and possible uses.
Usage	Select which types of telemedicine events the site can host: Clinical events directly or indirectly disclose patient information. Educational events involve a speaker and an audience, such as conferences, workshops, interest group sessions, training programs lunch and learn sessions. Administrative events involve two or more parties and the content is administrative in nature, such as committees, working groups, project status reports, or interviews.
Scheduling Notes	Describe any conditions or special features that affect the system. For example, if clinical usage is available only during specific times.
Peripherals Available	Select which telemedicine devices are available for use with the system.
Accessibility	Select which types of accessibility the system offers.
Telemedicine Contacts (TMCs)	<p>Contact information (name, phone, fax and email) of the person(s) to be contacted regarding telemedicine events using this system.</p> <p>System TMCs are listed in order of priority, as defined by the site's OTN Primary Contact for Service.</p> <p>If you need to add, change or delete contact information related to a system, email ContactUpdates@otn.ca.</p> <p>If you are the OTN Primary Contact for Service, you can identify or change the priority of the listed TMCs. That is, who should be contacted first, second, third, etc.</p> <ul style="list-style-type: none"> For each TMC, click the Priority dropdown arrow and select the desired number.
Contact Information	
Parking Instructions	Describe any relevant information about parking at the site. If provided, this information appears under the Google map in the right navigation panel of the site's profile page.

Telemedicine Contacts: (assign contact(s) in priority order)

Priority:	2
Name:	ABC Clinic Booking Clerk
Phone:	7055558600x3831
Fax:	7055557561
Email:	booking@abc.org
Priority:	1
Name:	Alfonso Quiver
Phone:	48600x3343
Fax:	57936
Email:	aquiver@abc.org



Group, Program, or BASE Managed Specialty Group Profiles

Groups, programs, and BASE Managed Specialty Groups have similar profiles and each is managed by a designated assigner.

Accessing a Group, Program, or BASE Managed Specialty Group Profile

1. Sign in at otnhub.ca and go to the **Directory** service.
2. [Search for the group](#), locate its name in the results list and click the name to display the [profile details](#).

The **Profile Details** screen appears with an **Edit** button at the top.

If an **Edit** button does not appear, you do not have administrative rights.

3. To open the site's profile details with fields available for edit, click the **Edit** button.

The site's **Edit Profile Details** screen appears with **Save** and **Cancel** buttons at the top.

For detailed edit instructions, see the following guides:

- [Administering a Group/Program Profile](#)
- [Administering a BASE Managed Specialty Group Profile](#).

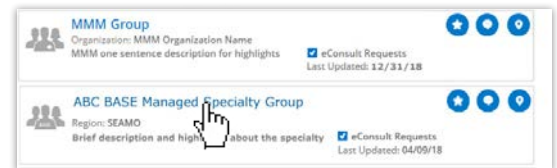


Figure 12: Search results list

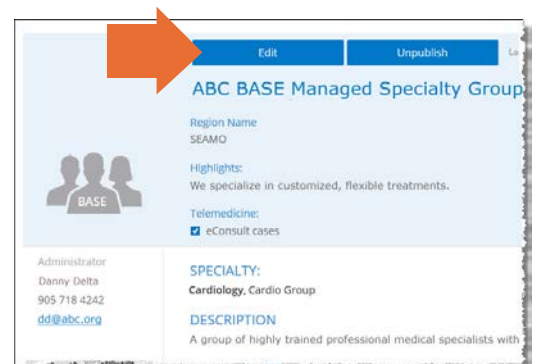


Figure 13: Profile details with edit button

Community Service Profiles

Note: Community services search is a pilot project and currently contains information only from the Toronto Central LHIN.

You cannot edit this information.

You can only suggest a change to the profile information.

All Community Service profiles are provided by the [Toronto Central Healthline](#), which has its own update process.

Accessing a Community Service Profile

1. Sign in at [otnhub.ca](#) and go to the **Directory** service.

2. [Search for the community service](#), locate its name in the results list and click the name to display the [profile details](#).

The **Profile Details** screen appears .

3. To suggest an edit, click the **Suggest an Edit** link at the top of the profile panel.

A new tab/window opens with the [Toronto Central Healthline](#) update service web page.

4. Follow the Healthline's instructions to submit your suggestion.

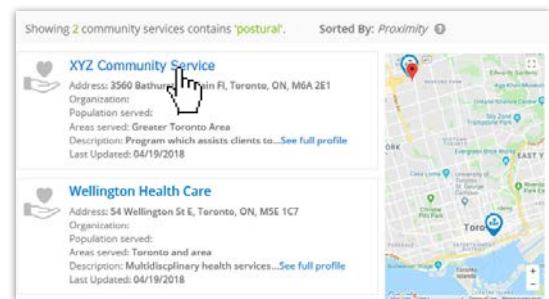


Figure 14: Community service search results

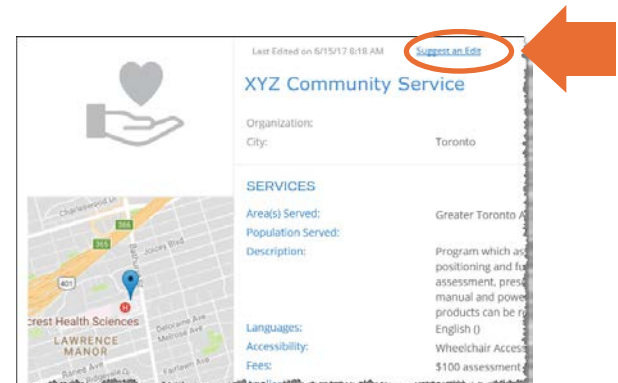


Figure 15: Profile details > Suggest an edit link

Managing Clinical Protocol Attachments and Links

Clinical protocols are procedural documents and forms provided by healthcare providers, sites, or groups/programs.

These protocols can be instructions, explanations, or questionnaires intended to help the patient or referring physician understand what is required for a clinical telemedicine session. This in turn helps the healthcare provider and the host site to properly prepare for and conduct the session.

A site might have general protocols but can also have protocols that apply to specific consultants who present at the site.

People (telemedicine and non-telemedicine providers), places, and groups/programs can have associated clinical protocols, which are accessible on their **View Profile Details** page.

If the person/place has a website or internet repository where they keep publicly accessible files, the protocol can be a link to these documents. Or the protocol can be an attached file.

When viewing a profile:

- If you don't have administrative rights, protocols appear as plain text with a linked icon on the right.
 - If the protocol is a web location, a **URL Link** icon (🔗) appears.
 - If the protocol is an attachment, a **File** icon (📎) appears.
- If you have administrative rights, protocols appear as blue underlined text along with edit (✎) and delete (🗑️) icons on the right.

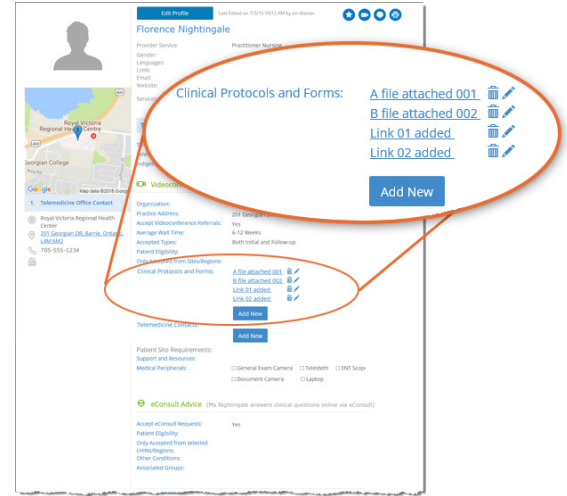


Figure 16: Telemedicine provider clinical protocols section

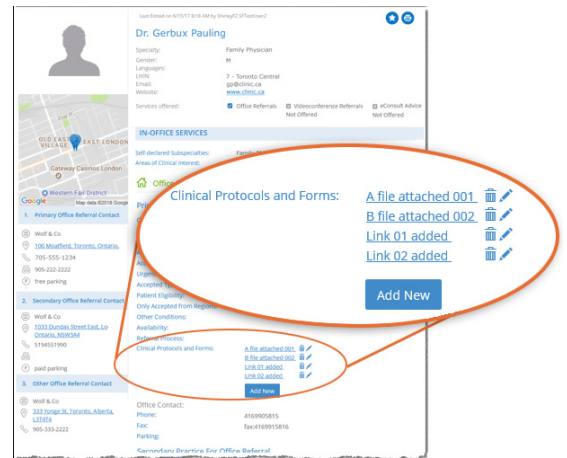


Figure 17: Non-telemedicine provider clinical protocols section



Accessing Clinical Protocols Fields

The clinical protocols fields are accessible on the **View Profile Details** page

For your own profile

1. Sign in at otnhub.ca, click the **Profile** link (👤) in the top right banner.
A **Profile/Self-Service** panel appears.
2. Click the **Edit Directory Profile** link in the panel.
Your **Edit Profile Details** screen appears with **Save** and **Cancel** buttons at the top.
3. Click **Cancel**.
Your **View Profile Details** screen appears.
4. Scroll down to the **Clinical Protocols and Forms** section.

For another person or site's profile

1. Sign in at otnhub.ca and go to the **Directory** service.
2. [Search for the person](#) and locate their name in the results list and click the name to display the [profile details](#).
The **Profile Details** screen appears.
3. Scroll down to the **Clinical Protocols and Forms** section.

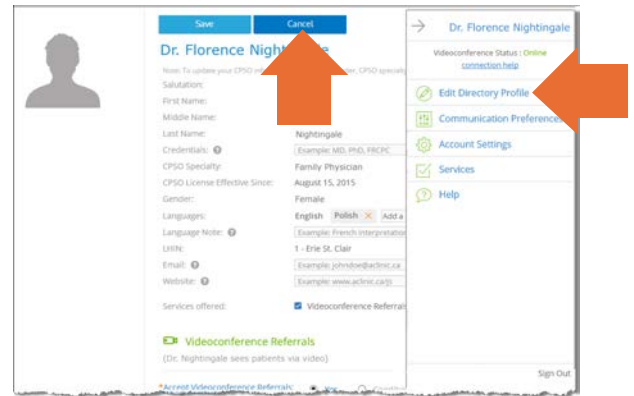


Figure 18: Change from edit mode to view mode for your own profile

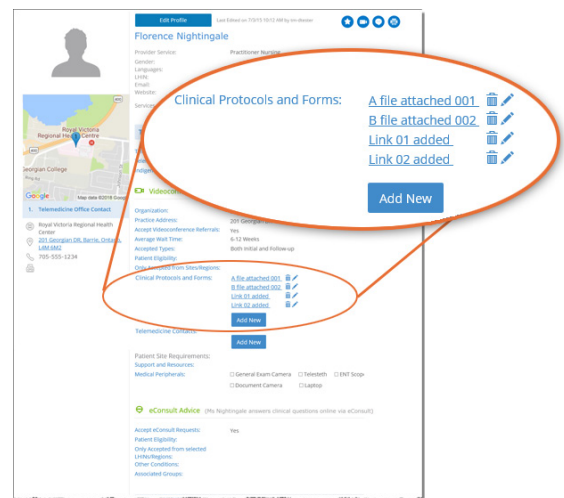


Figure 19: Protocols section in View Profile Details



Adding a File or Link

Access the [protocols section of a profile](#) and to view the fields needed for adding a new link or file, click [Add New](#).

A protocol panel appears with fields to identify a URL or file.

To add a new URL link:

1. Click [URL](#) under the title **Provide Clinical Protocol or Form as**.
2. Type the **full URL** in the text field under the [URL](#) button. (Include `http://` or `https://` at the beginning and the file type extension (e.g., `.doc`, `.pdf`) at the end.)
3. Type a meaningful name for the link in the **Display Name** field and then click [Add](#).
The **View Profile** screen reloads with the updated **Clinical Protocols and Forms** list.
4. Test the link to ensure that it works. (For example, a broken link could be caused by spelling mistakes or other errors.)

To add a new file,

1. Click [File](#) under the title **Provide Clinical Protocol or Form as**.
A File Explorer window opens.
2. Navigate to the desired file* and click to select.
The selected file name appears under the [File](#) button.
3. Type a meaningful title for the file in the **Display Name** field and then click [Add](#).

When the URL or file is successfully added, the **View Profile** screen reloads with the updated **Clinical Protocols and Forms** list and a success message briefly appears.

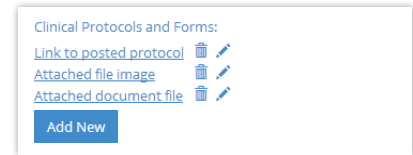


Figure 20: Clinical protocols

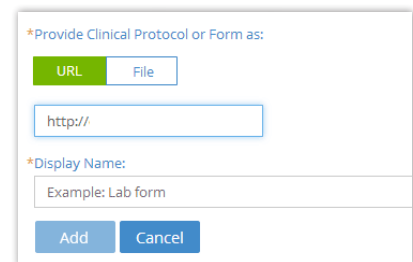


Figure 21: Add URL clinical protocol

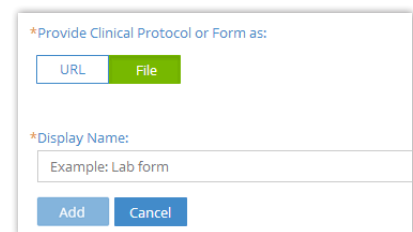


Figure 22: Add file clinical protocol

* You can attach only the following file types:
doc/.docx, .pdf, .rtf, .txt, .jpeg/jpg, .xls/xlsx, .png, .tiff, .bmp, .gif, .ppt/.pptx.

Editing a Link or Display Name

For clinical protocols that are links, the edit feature allows you to change the URL Link or its Display Name.

For clinical protocols that are files, the edit feature allows you to change the attached file or its Display Name.

To access the clinical protocol fields:

Access the [protocols section of a profile](#) and click the **Edit** icon (✎) beside a listed item.

The protocol panel appears with the current link/file and its associated Display Name.

To edit a URL link:

1. Change the URL or **Display Name** as desired.
2. To apply the update, click **Apply**.
3. The **View Profile** screen reloads with the updated **Clinical Protocols and Forms** list.
4. Test the link to ensure there are no spelling mistakes or other errors.

To edit a file:

1. To change the attached file, click **File** under the title **Provide Clinical Protocol or Form as**.
A File Explorer window opens.
2. Navigate to the desired new file* and click to select.
The selected file name appears under the **File** button.
3. To change the **Display Name** field, type an updated name and then click **Apply**.

When the file or URL Link is successfully updated, the **View Profile** screen reloads with the updated **Clinical Protocols and Forms** list and a success message briefly appears.

* You can attach only the following file types:
doc/.docx, .pdf, .rtf, .txt, .jpeg/jpg, .xls/xlsx, .png, .tiff, .bmp, .gif, .ppt/.pptx.

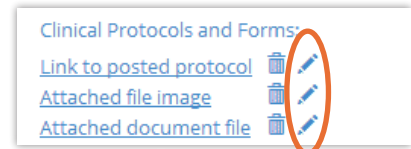


Figure 23: Protocol edit icons

Figure 24: Edit protocol URL fields

Figure 25: Edit protocol file fields

Deleting a File or Link

1. [Access the protocols section of a profile.](#)
2. To remove a URL/file, click the **Delete** icon (🗑️) beside the item.
A Confirmation dialog box appears.
3. To confirm and delete the URL/file, click **Delete**.
The deletion occurs and a success message briefly appears at the top of the screen.
If you change your mind and do not want to delete, click **Cancel**.

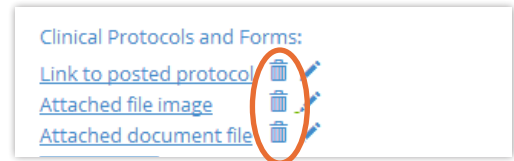


Figure 26: Protocol delete icons