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ONE® ID Identity and Access Management System

Local Registration Authority User Guide

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Revision History

Date	Version	Revision
March 4, 2021	2.3	Revisions to reflect RSA SecurID token management
August 13, 2018	2.2	Update to Appendix F – 13.3.6 do not add PD to TR accounts
August 21, 2017	2.1	Added Appendix G – Diagnostic Imaging and updated available CCO roles
September 22, 2015	2.0	Added Appendix F - Panorama
April 15, 2015	1.9	Added sections 5.4, RSA SecurID Token Modification and 4.6.2 Registering Organizations Updates to Account Statuses
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June 8, 2014	1.7	Added enrolments in Appendix C; updated images
March 2, 2014	1.6	Added section 4.6.1, Supplemental Identity Verification
January 21, 2014	1.5	Updates to enrolment listing and sections 4.7, 5.2.6 & 5.2.7
March 20, 2013	1.4	Addition of "Guidelines to Protecting Personal Information" and updated enrolments listing
June 19, 2012	1.3	Updates to Home page image with Dashboard and sections 4.7, 5.2.6 & 5.2.7
December 5, 2011	1.2	Mandatory phone number and new banner
August 15, 2011	1.1	Added enrolments in Appendix C
June 6, 2011	1.0	Initial Release

Table of Contents

1.0 About This Document

1.1 Purpose

The purpose of this manual is to describe the detailed procedures of the various registration functions that a Local Registration Authority can perform in the ONE® ID Identity and Access Management System. Each function has a brief description, followed by steps on how to perform the function in the system.

1.2 Scope

This document contains procedures for the following:

- Registering and Enrolling Individual Users

- Viewing Account Information

- Modifying Registrant Information

- Modifying Enrolment information

- Suspending, Reinstating and Revoking an Enrolment

1.3 References

For more detailed procedures on processes and policies, see the ONE® ID LRA Procedures Manual, located on the Registration Community Site – http://www.ehealthontario.on.ca/one-id-lra

2.0 Introduction

ONE® ID is a set of systems and business processes that provides trusted and secure access to eHealth applications and services to healthcare providers registered with Ontario Health.

ONE® ID enables registration, authentication and authorization security for access to designated eHealth systems. The purpose of the ONE® ID system is to ensure that only those people who are authorized to electronically access personal health information under the control of Ontario Health are capable of doing so.
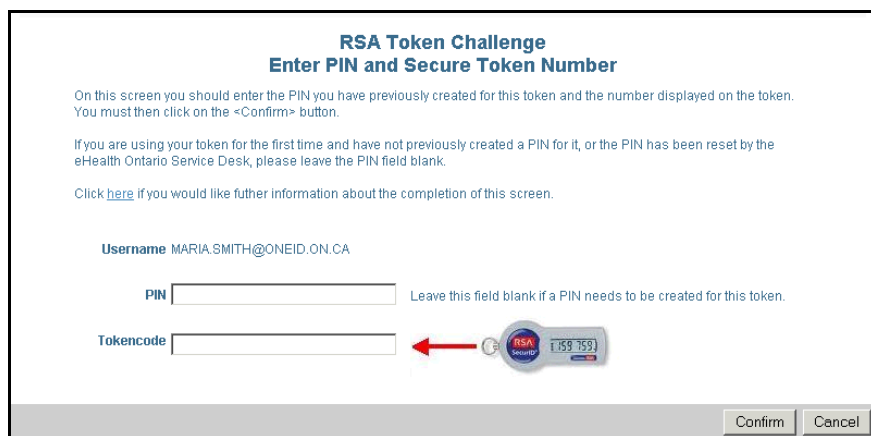
3.0 Logging In

Prior to logging into the ONE® ID system, you must have been registered and enrolled as a Local Registration Authority; received a RSA SecurID token; self completed your registration online and activated your RSA token. Logging into the ONE® ID system requires two factors of authentication: Login ID and password, along with an RSA token challenge.

To login, navigate to the URL http://www.ehealthontario.on.ca/en/support-topics/one-id-lra . Click **Access *the ONE® ID Application*** button.

1.   Enter your **Login ID** and **Password**.

2.   Click **Login**.

3.   Enter your token **PIN** and the 6-digit **Token code**.

4.   Click **Confirm**.

If logging in for the first time or your PIN has been reset by the Ontario Health Digital Support Desk, you must create your token PIN number.

5. Leave the **PIN** field blank and enter the 6-digit **Token code**.

6. Enter a 4 to 8 digit PIN number.

7. Click **Confirm**.

You will receive a confirmation that your new PIN number has been created. You can now proceed with logging into the ONE® ID System.

8. Enter your token **PIN** and the 6-digit **Token code**.

9. Click **Confirm**.

Upon successful authentication, the **Home Page** opens.

3.1 Home Page

From the Home Page, you can make a new registration request and view your profile.

3.1.1 Home

If at any time you wish to return to the Home Page, click **Home**.

3.1.2 User Status Dashboard

The User Status Dashboard allows LRAs to view the status their registrants newly added service enrolment. Names under Successful Status are users whose service enrolments have successfully provisioned while names under Pending Status are users whose service enrolments are still in the process of being provisioned

3.1.3 New Request

Click here to initiate a new request such as a new registration, add a new enrolment, or modify an enrolment or account information.

3.1.4 My Profile

To verify the information in your profile, change your password or online and Service Desk challenge questions, click **My Profile**. You can also view your enrolment information, identity documents and professional designations. For more information and on how to manage your account, see the ONE® ID Registrant Reference Guide.

3.1.5 Help

In subsequent releases, this link opens a new window with Help information.

3.1.6   Logout

When you have completed using the ONE® ID system, click **Logout**.

3.1.7   Acceptable Use Policy

To view the Acceptable Use Policy, click this link located at the bottom of the Home screen.

3.1.8   Privacy Statement

To view the Privacy Statement, click this link located at the bottom of the Home screen.

4.0 Register and Enrol Individuals

Registration and enrolment of an individual into a ONE® ID service using the ONE® ID Identity and Access Management System consists of three main steps:

1. **Verification and Sponsorship** – Your name appears as the individual who verified the new request. Select the organization sponsoring the registrant's access.

2. **Identify the Individual** – Identify information about the new registrant and by matching the information provided, determine if the registrant already exists.

3. **Enrolment** – Provide the Registrant with access to the enrolment(s) in which they have been sponsored by their organization.

4.1 Verification and Sponsorship

The following is the process of collecting the necessary information about verification and sponsorship that is required to register a new individual. The verifier and selected sponsor determine your ability to register an individual.

After you login, the Home Page opens. From here, select the type of request to process.

1. Click **New Request**.

2. From the **New Request** menu, select **Individual**. This takes you to the **Verification and Sponsorship** screen.

The system displays your name as the LRA performing the registration and/or enrolment and cannot be changed.

3. Select the **Verified On** date. Date selected should be the same date you verified the identity information.

4. Confirm **that** sponsorship has been received for the request. If the request has been authorized, select **Authorization for this request was received from a recognized sponsor**. The system then displays a list of sponsoring organization(s) in which you have been enrolled as an LRA
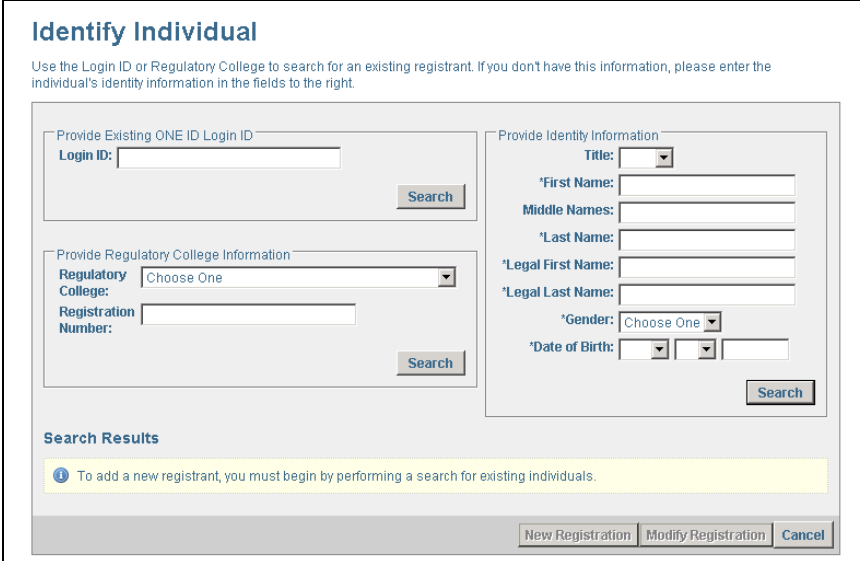
> **Note:** If sponsorship was not received for the request, you cannot register a new individual.

5. From the list of Sponsoring Organization, select the organization that has authorized the request. Registering Organizations can be identified by the 🤝 icon located next to the organization's name.

6. From the list of **Available Services**, verify that the service being requested is available for the selected sponsoring organization and select **Next**. If the requested service is not listed, contact the Ontario Health ONE ID Registration Agents for further assistance.

   The system then opens the **Identify Individual** screen.

4.2 Identify Individual

To prevent duplicate registration records, you must determine whether a registrant already exists prior to creating a new registration record. A search is conducted for registrants matching the identity information provided. If the registrant already exists, you can modify the existing registrant. If the registrant does not exist, you create a new registrant.

1. Enter the login ID (first.last@oneid.on.ca)or Regulatory College to search for an existing registrant. If you do not have this information, enter the full identity information for the registrant under "Provide Identity Information" on the right of this screen.

2. Click **Search**.

> **Note:** The **New Registration** button is greyed out until you have performed a search for an existing registrant. Wildcard (* or %) searches are not permitted. Maximum characters that can be used for Name fields is 25

If matching results:

The system displays all registrants that exactly match the information provided. You may click on the registrant's name to view a read-only profile for that registrant to confirm you are selecting the correct account. The status of the registrant account is also displayed. See Appendix E – Account status for a listing of statuses a registrant's account can have.

1. Select the radio button next to the registrant's profile you wish to modify. The **Modify Registration** button is now active.

2. Select **New Registration**. See section 5.2 Registrant Profile Modifications, for more information on modifying a registrant's profile.

If potential matching results:

Confirm that the identity information provided has been entered correctly. If not, make the necessary changes and click **Search**. Once you have confirmed that the correct identity information has been entered, you may proceed with creating a new registration.

1. Select the check box **Double Checked**. The **New Registration** button is now active.

2. Select New Registration to create a new registrant record.

If no matching results:

The New Registration button becomes active and may now be selected and you may proceed with creating a new registrant record.

1. Select **New Registration** to create a new registrant record.

> **Note:** If the registrant is less than the minimum age of fourteen (14) required for Assurance Level One (AL1), or sixteen (16) for Assurance Level Two (AL2) you must submit a request directly to Ontario Health ONE ID Registration Agents.

4.3 View Registrant Profile

Once you have collected the identity information, an incomplete set of the registrant's details are displayed. You can enter any remaining detail here before you save the registration. If the identify information is not correct, click cancel to return to the previous screen to re-enter the information and perform a duplicate search on the corrected information.

> **Note:** You may cancel the registration at any time by selecting **Cancel**. In this case, all data entered for the account is discarded. A cancel confirmation warning appears, asking you to confirm the cancellation.

> **Note:** The highlighted field at the bottom of the screen provides you with the necessary tasks to complete before the registrant record can be saved.

4.4 Add Preferences

The following steps outline the process for adding the registrant's contact preferences.

1. From the **Registrant** screen, just below the registrant's name, click on **set contact email**. This opens the **Preferences** screen.
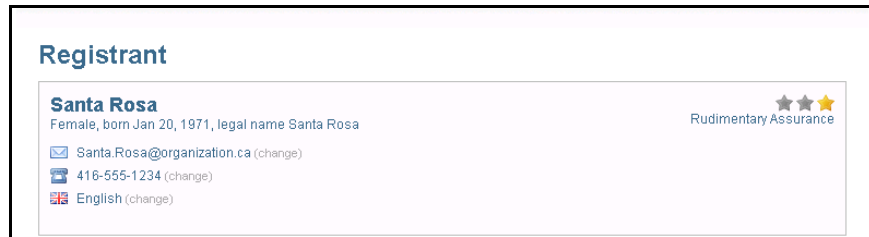
2. Enter the **Contact Email** and **Contact Phone Number** and select the **Preferred Language**. The fields marked with an asterisk are mandatory fields.

> **Note:** The email address entered will be used to notify the Individual when their password is due to expire.

3. When you are done entering the information, click **OK** to save it. You then return to the registrant's profile.
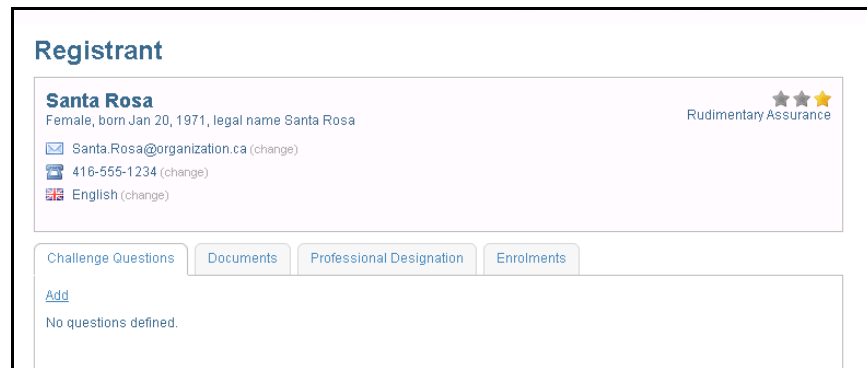
Once you have added the preferences, you will see a change link. To make a modification to any of the preferences, select **change** next to the preference you wish to modify. The Preferences screen opens where you can complete the modification.
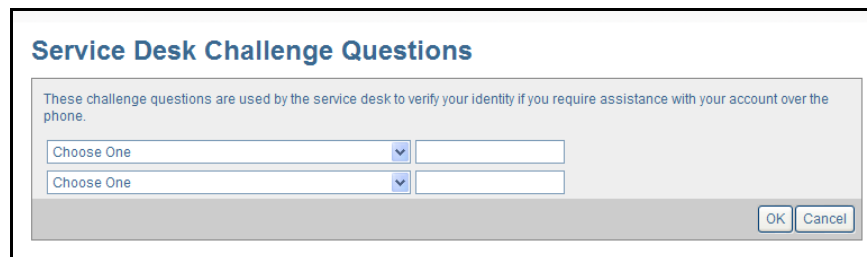
4.5 Add Service Desk Challenge Questions

The following steps outline the process for adding the registrant's Service Desk **Challenge Questions**.

1. On the **Challenge Questions** tab, click **Add**. This takes you to the Service Desk Challenge Questions screen.

2. From the drop-down menu, select two challenge questions.

3. Enter the responses.

4. Click **OK**. The updated Registrant Profile is displayed, masking the Answers to the Challenge Questions for security purposes.

> **Note:** If either the challenge questions or the answers are the same (i.e., same question chosen or same answer provided), the system displays a SAME QUESTION or SAME ANSWER message and a different question or answer must be provided. See Appendix A for a list of available questions.

Once you have added the challenge questions, a **change** link appears. To modify either of the challenge questions, click **change**. The Service Desk Challenge Questions screen opens, so you can modify the challenge questions.

4.6   Add Professional Designation

The ONE® ID system validates a registrant's legal name, Regulatory College and Registration Number against the Provider Registry when entering the Professional Designation. If the college registration number does not match against the Provider Registry, the ONE® ID system will display an error message.

The following steps describe the process for adding the registrant's professional designation.

1. On the **Professional Designation** tab, click **Add**. The **Professional Designation** screen opens.

   The Professional Designation tab is visible for both Rudimentary and Medium level of assurance registrants. However, the addition of a professional designation is mandatory only for medium level of assurance registrations.

2. From the drop-down menu, select the **Regulatory College** provided. If no Regulatory College has been provided, select **Not Applicable**. In this case, you do not need to enter a Registration Number.

3. Enter the **Registration Number**. The Registration Number is mandatory only if a Regulatory College is selected.

4. Click **OK**.

> **Note:** The ONE® ID system validates a registrant's first name (legal and/or preferred), legal last name, Regulatory College and Registration Number against the Provider Registry when entering the Professional Designation. If the college registration number does not match against the Provider Registry, the ONE® ID system will display an error message.

5. The updated Registrant's profile is displayed.

Once you have added the professional designation, a (**change**) link appears next to the document. To modify the professional designation, click (**change**). The Professional Designation screen opens, where you can modify the professional designation and/or registration number. You may also add additional professional designations as required by selecting the **Add** link.

Now that the Preferences, Service Desk Challenge Questions and Professional Designation have been entered, the system indicates that the record is complete and can be saved. To save the record at Assurance Level 1 (AL1), go to Step 6 or continue to section **4.6 Add Identity Documents** to create an - Assurance Level Two (AL2) registration.

6.   From the Registrant profile screen, click **Save**

   a.   The registrant record is created at Assurance Level One (AL1).

   b.   You receive confirmation that the registrant record has been successfully saved. The record displays with the Login ID and temporary password.

   c.   The registrant receives an automatic enrolment into the eHealthOntario.ca portal

Note: Record the registrant's Login ID and temporary password and provide the credentials to the registrant. The temporary password is not displayed again and the registrant must call the Ontario Health Digital Support Desk to obtain a new temporary password if it is not recorded.

4.7 Add Identity Documents

The following steps describe the process for adding the registrant's identity documents.

1. On the **Documents** tab, click **Add Primary Document**. The **Identity Document** screen opens.

2. From the **Document Type** drop-down menu, make a selection.

3. Enter the document number. The document number must be recorded for the primary document and impacts the Level of Assurance if not entered. The document number is not mandatory for the secondary document.

4. Enter the **Expiry Date** (if applicable).

5. Click **OK**.

To add the second document, click **Add Document** and repeat the process.

The updated Registrant's profile is displayed.

4.7.1   Supplemental Identity Verification

You may select Supplemental Identity Verification through the **Add Document** interface. This option may be used in lieu of Secondary Identity Document.

1. From the **Document Type** drop-down menu, select **Supplemental Identity Verification**

2. The **Number** and **Expiry Date** fields become locked and a new drop-down menu, **Registration Context** appears.

3. Select the relevant context from the **Registration Context** drop-down.

4. Click **OK**.

Supplemental Identity Verification is sufficient to establish Medium Level of Assurance when used in conjunction with a **Photo ID** from the **Primary Documents** list.

4.7.2   Registering Organizations

In the ONE® ID system, Registering Organizations have an additional identity validation option. If you are an LRA at a Registering Organization, please proceed with the following steps to capture the unique identifier as part of validating the user's identity. If you are registering a user who has not met your organization's onboarding process requirements (e.g. third party staff or contractor), please follow steps 1-5 in the above <u>4.7 Identity Document section</u>.

1. On the Documents tab, click **Add Employee Identifier**

2. Enter the
   Identification Number (e.g. Health Service Provider ID or Professional License Number).

> **Note:**   **Document Typ**e is preset to **"Employee Identifier"** and the **Organization** is displayed

3. Click **OK**.

> **Note:** The unique identifier is sufficient to grant **Assurance Level 2 (AL2)**. There is no need to review additional documents.

Once you have added the identity document(s), a **(change)** link appears next to each document. To modify an identity document, click **(change)**. You will be directed to the Identity Document screen, where you can modify the document type, number and/or expiry date. You may also add additional identity documents as required.

The registrant's profile is updated with the Level of Assurance, represented by stars. 1 star denotes Assurance Level One (AL1) and 3 stars denotes Assurance Level Two (AL2).

Place your mouse over the stars to show the list of requirements required to fulfill Assurance Level Two.

4.8   Add Enrolments

The following steps outline the process for requesting a new enrolment or role for which the sponsor of the request (as selected on the Verification and Sponsorship screen) has provided authorization.

> **Note:** If authorization from a recognized sponsor was not selected on the Verification and Sponsorship screen, you cannot add any enrolments.

1. On the Enrolments tab, click **Add Enrolments or Roles**. This takes you to the Add Enrolments or Roles screen.

> **Note:** This screen displays the services available to the sponsoring organization as indicated on the Sponsorship and Verification screen, as well as the level of assurance required for each service enrolment. If the registrant does not have the correct level of assurance for the requested service, you cannot add the service.

2. Select the enrolment(s) and role(s) that have been authorized for the registrant by the sponsoring organization.

> **Note:** To expand and view the list of roles available for the selected enrolment, click +. Mandatory roles are not displayed as they are automatically provisioned.
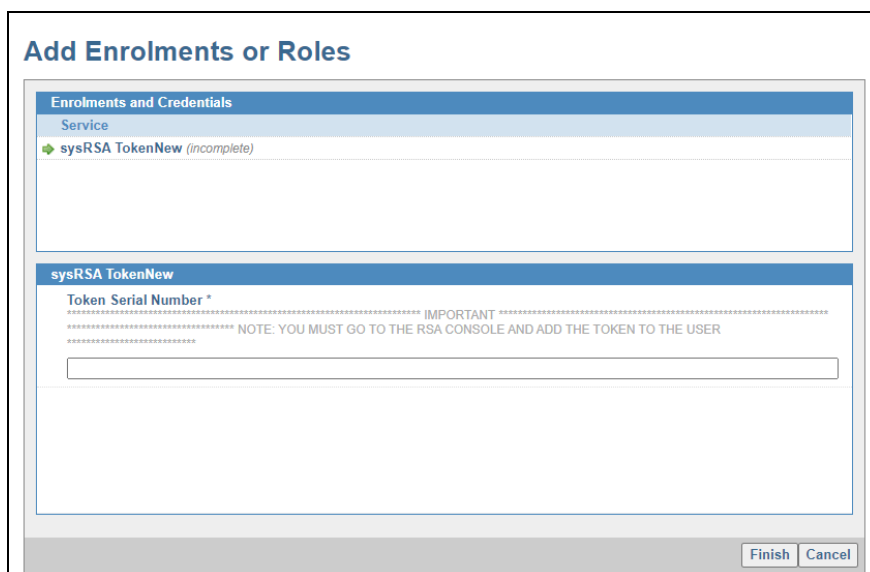
3. Enter the attributes associated to the selected enrolment. **Incomplete** is indicated next to each enrolment that requires attributes to be entered. If multiple enrolments are being added, you must select each enrolment to display the attributes required. All attributes for each enrolment must be completed before you can proceed. For more information regarding enrolment attributes, see Appendix C.

   For enrolments requiring a token, enter the token serial number. You will need to assign the token to the user in the RSA Console, please refer to the RSA Console User Guide for ONE ID Local Registration Authorities for further details.

   If you are adding an enrolment that requires a token and the registrant has an existing token, you are not prompted to enter a token serial number.

   In the event that you have run out of tokens, enter 00000000 in the Token Serial Number field and contact the Ontario Health ONE ID Registration Agents to assign a token. See Appendix D for Details

4. Click **Finish.** The registration and enrolment tasks are complete.

5. From the Registrant profile, click **Save**.

> **Note:** You must complete the Challenge Questions, Documents, Professional Designation, and Enrolments along with Email Contact prior to clicking **Save**. Once you have completed the record with the mandatory information, the system displays a confirmation that the record is complete and can be saved.

Select the plus (+) sign next to the enrolment to expand and view the following enrolment information:

a. Status of enrolment.
   Active – If sponsorship of the enrolment is not suspended or revoked
   Temporarily Unavailable – If the enrolment is in the process of being completed or provisioned

b. Organization that sponsored the enrolment.

c. Attributes associated to the enrolment. Click on the enrolment to view the attributes.

d. Role(s).

Confirmation that the registrant record has been successfully saved is displayed along with the Login ID and temporary password. The registrant receives an automatic enrolment into the eHealth Ontario Portal.

If you have added an enrolment with a token you must assign the token to the users account in the RSA Console. Please refer to the RSA Console User Guide for Local Registration Authorities for further information or contact the Ontario Health Digital Support Desk.

> **Note:** Record the registrant's Login ID and temporary password and provide the credentials to the registrant. The temporary password is not displayed again and the registrant must call the Ontario Health Digital Support Desk to obtain a new temporary password if it is not recorded.

5.0 Registrant Maintenance

Registrant maintenance and modification using the ONE® ID Identity and Access Management System is comprised of 3 main steps:

1. **Verification and Sponsorship** – Your name appears as the verifier for the request. Select the organization that is sponsoring the change.

2. **Identify the Individual** – Identify information about the registrant and determine by matching the information provided, the correct registrant in order to perform the change.

3. **Modify** – Modify the Registrant details or access to the service(s) in which they have been sponsored by their organization

5.1 Modifying a Registrant

5.1.1 Verification and Sponsorship

The following process describes how to collect the necessary information about verification and sponsorship that is required for you to modify a registrant account. Your previous selections of verifier and selected sponsor determine which aspects of the Registrant's record you can modify.

1. From the **New Request** menu, select **Individual**. This takes you to the **Verification and Sponsorship** screen.

The system displays your name as the LRA

2. Select the **Verified On** date. The date should be the same date you verified the request to modify a registrant's account information.

3. Confirm that you have received sponsorship for the request. If the request has been authorized, select **Authorization for this request was received from a recognized sponsor**. The system then displays the sponsoring organization(s) in which you have been enrolled as an LRA.

   If sponsorship was not received for the request, you cannot add or modify enrolments. See <u>Appendix B – Verification and Sponsorship</u> for a complete list of functions that can be performed based on this selection.

4. From the list of Sponsoring Organization, select the organization that has authorized the request.

5. From the list of **Available Services**, verify that the service being modified is available for the selected sponsoring organization and select **Next**. If the requested service is not listed, contact the Ontario Health ONE ID Registration Agents for further assistance.

   The system then takes you to the **Identify Individual** screen.

5.1.2   Search for Registrant

The following process is necessary to determine if the registrant exists. A search is conducted for records matching the identity information and login ID provided.

1. Enter the login ID (first.last@oneid.on.ca)or Regulatory College to search for an existing registrant. If you do not have this information, enter the full identity information for the registrant under "Provide Identity Information" on the right of this screen.

2. Click **Search**.

   > **Note:** The **New Registration** button is greyed out until a search for existing registrant has been performed. Numerical values for Name fields cannot be used. Wildcard (* or %) searches are not permitted.

If matching results:

The system displays all registrants that exactly match the information provided. Click on the registrant's name to view a read-only profile and display more information about the registrant. Validate and determine that the correct account is selected. The status of the registrant account is also displayed. See Appendix E – Account status for a listing of statuses a registrant's account can have.

3. If registrant is an exact match, select the radio button next to the registrant's profile you wish to modify. The **Modify Registration** button becomes active and you can select it.

If no matching results:

Confirm the identity information provided has been entered correctly. If required, modify the information and perform a search on the corrected information. If no matching results, select **New Registration** to create a new registrant record.

1. Select **New Registration** to create a new registrant record. See <u>Section 4.3 – View Registrant Profile</u> for more information on creating a new registrant record.

5.1.3   Registrant Profile

The Registrant profile screen displays a complete set of the registrant's details and provides options for their modifications.

View the registrant's profile to determine which information you want to modify.

5.2 Registrant Profile Modifications

5.2.1   Modify Identity Information

The following steps outline the process to modifying a registrant's identity information such as Login ID, Legal First name, Legal Last name, Gender or Date of Birth. Identity documents are used to validate any changes to the core identity information and may be required to validate a modification. Changes to a Registrant's Login ID are allowed only when a name change has occurred.

> **Note:** If a registrant has active medium level of assurance enrolments, modification of a registrant's DOB to less than the minimum age of sixteen (16) is not permitted as this would cause the registrant's level of assurance to drop below the level required for the enrolments. This request must be submitted to Ontario Health ONE ID Registration Agents.
>
> **Note:** Modification of a registrant's DOB to less than the minimum age of fourteen (14) must be submitted to Ontario Health ONE ID Registration Agents.

1. On the **Registrant** profile screen, click **Change** next to the registrant's name.

    a. If the registrant is a medium level of assurance user, the **Verify Identity Information Change** screen appears.

    b. If the registrant is a rudimentary user, the **Change Identity Information** screen appears.

2. In the **Verify Identity Information Change** screen, select which verification method was provided for the request.

    ▪ An identity document was not verified for this request; or

    ▪ One or more of the documents verified for this registrant in the past were verified for this request; or

    ▪ A new identity document was verified for this request.

    Legal First or Legal Last name cannot be modified if:

    ▪ the registrant is registered at a Medium Level of Assurance and you have selected the first option; or

    ▪ If document provided in the third option is not a Legal Change of Name Certificate. Only in the event that the legal name was mistyped, you may select the second option.

    Gender or Date of Birth cannot be modified if:

    ▪ The registrant is registered at a Medium Level of Assurance and you have selected the first option. In this case select the third option and provide new document.

For a gender change, the registrant must provide a new birth certificate. You can select the second option only in the event that the gender or date of birth was mistyped.

If you have selected the first option, you can modify Login ID, Title, First, Last and Middle Names.

3. Click **Next**. This takes you to the **Change Identity Information** screen.

You may be able to modify the fields, depending on the selection made on the Verify Identity Information Change screen. The fields that you cannot modify are greyed out.

4. Make the requested modification to the registrant.

> **Note:** When modifying the Login ID, you must provide a unique login ID. If the login ID you provide is not unique, the system displays a duplicate login message and suggest an alternate login ID.

5. Update the Login ID to ensure it is unique (if required) and Click **OK**. The updated **Registrant** profile screen displays with modified information. The modified information is provisioned for all service enrolments.

6. Confirm the identity modification has been made correctly.

5.2.2   Modify Preferences

The following steps outline the process to modify a registrant's preferences such as email address, phone number and language preference.
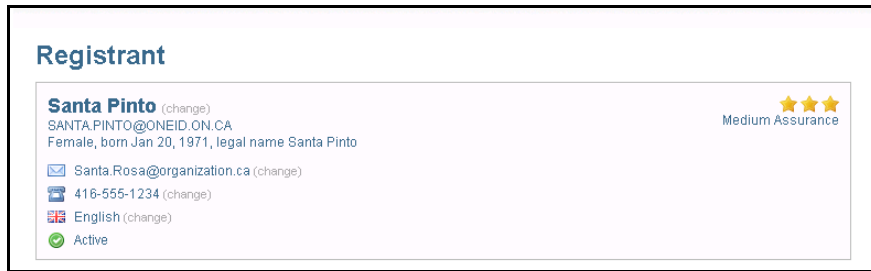
1. From the **Registrant** profile screen, beside the email, phone or language preference, click **change**. This takes you to the **Preferences** screen.
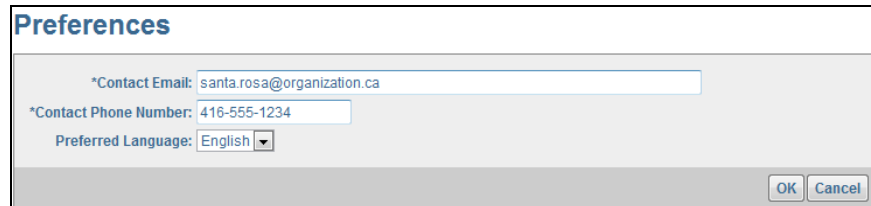
2. Modify the **Contact Email**, **Contact Phone Number** and/or **Preferred Language**. The preferred language is only applicable to the eHealth Ontario portal enrolment.

3. Click **OK**. The registrant profile screen is displayed with the modified preferences. The modified preferences are provisioned to any systems that require it.
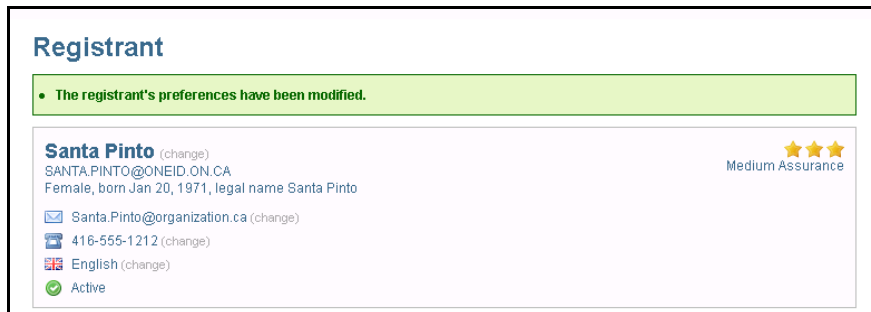
4. Confirm the modified information is correct.

5.2.3   Modify Service Desk Challenge Questions

Service Desk Challenge Questions are collected for support purposes. A registrant is asked these questions when he/she calls in to the Service Desk to verify his/her identity. The following steps outline the process to modify a registrant's Service Desk Challenge Questions.

1. From the **Registrant** profile screen, go the **Challenge Questions** tab and click **Change**. This takes you to the **Service Desk Challenge Questions** screen.

2. From the drop-down menu, select the challenge questions.

3. Enter the responses.

> **Note:** If either challenge questions or answers are the same (i.e., same question or answer chosen in the fields provided) the system displays a SAME QUESTION or SAME ANSWER message and a different question or answer must be provided. See Appendix A for a list of available questions.

4. Click **OK**.

5. The updated **Registrant** profile screen is displayed with the modified challenge questions.

5.2.4   Modify Identity Documents

The following steps outline the process to modify a registrant's identity documents should any document need to be replaced. If a replacement document has been provided, the document must be verified by the LRA. If an identity document was found to be fraudulent, report the identity document to the Ontario Health Digital Support Desk.

Warning: Modification of identity documents can, in some cases, result in the level of assurance dropping below the level required for the enrolments. Ensure that the appropriate replacement Primary or Secondary Identity documents are provided before proceeding, to ensure the registrant maintains their required level of assurance for the services in which they are enrolled. To achieve a Medium Level of Assurance, the registrant's account must contain two identity documents, one of which must contain a photo, one must be a primary document with the document number recorded, and both documents must be current and must have been verified. For more information on identity documents and level of identity assurance, see the LRA Procedure Manual.

1. From the **Registrant** profile screen, go the **Documents** tab.

2. Beside the document to be modified, click **Change**. This takes you to the **Change Identity Document** screen.

3. In the **Document Type** drop-down menu, make a selection in the list provided.

4. Enter the **Document Number** (if applicable). The document number must be recorded if replacing a primary document. If not entered, you are affecting the Level of Assurance.

5. Enter the **Expiry Date** (if applicable).

6. Click **OK**.
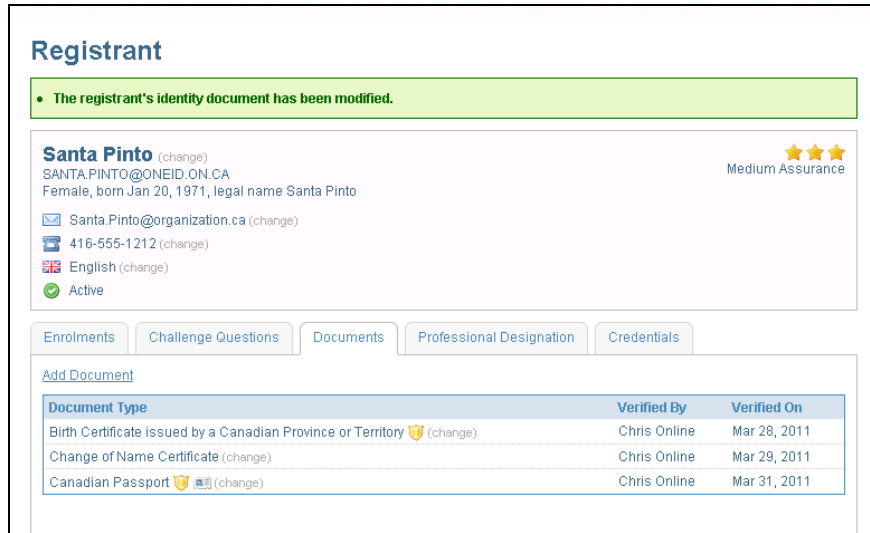
7. The updated **Registrant** profile screen is displayed with the modified identity documents.

5.2.5   Add Identity Document

Identity documents are used to validate identity during the registration and service enrolment of Registrants. Identity documents are captured as part of the registration record and can be used to uniquely identify a registrant. The following steps outline the process to add a new identity document to a registrant's profile.
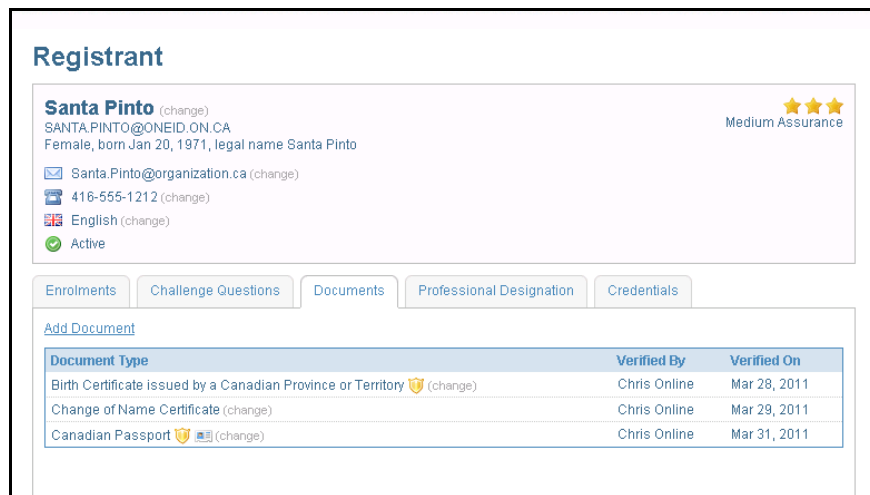
1. From the **Registrant** profile screen, go the **Documents** tab and click **Add**. This takes you to the **Identity Documents** screen.

2. From the **Document Type** drop down menu, make a selection.

3. Enter the **Document Number** (if applicable). If you are adding a primary document, you must record the document number. If not entered, it may affect the Level of Assurance.

4. Enter the **Expiry Date** (if applicable).

> **Note:** If the registrant has a document with the same type and number already existing, this entry is considered a replacement and you are prompted to confirm the replacement document.

5. Click **OK**.

6. The updated **Registrant** profile screen is displayed with the modified identity documents.

Place your mouse over the level of assurance to show a listing of the criteria that is used to determine the level of assurance.

5.2.6 Modify Professional Designation

The following steps outline the process to modify a registrant's Professional Designations.
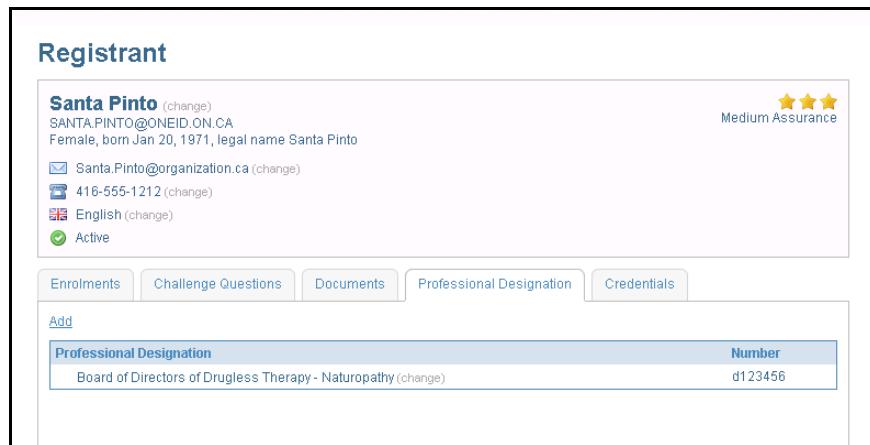
1. From the **Registrant** profile screen, go the **Professional Designation** tab.

2. Next to the document to be modified, click on **Change**. This takes you to the **Change Professional Designation** screen.
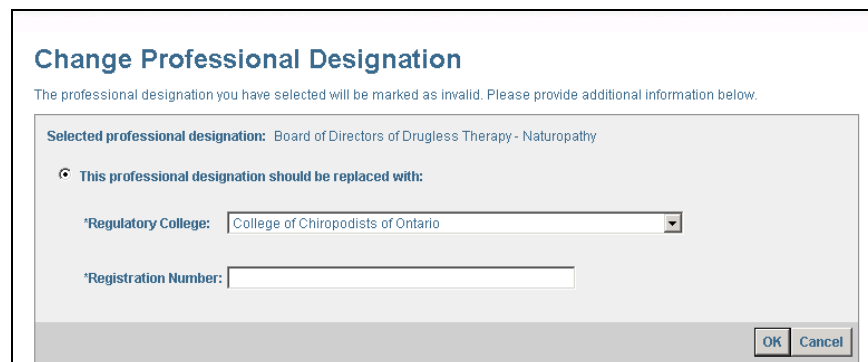
3. In the **Regulatory College** drop down menu, make a selection.

4. Enter the **Registration Number**. This is a mandatory field if a Regulatory College is selected.

5. Click **OK** and a confirmation box appears.
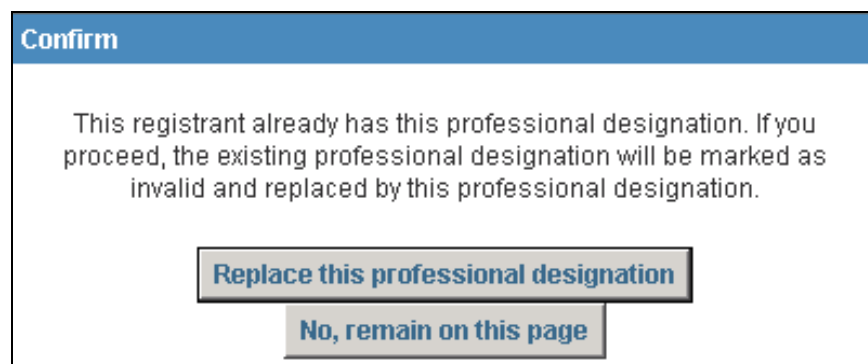
   a. Click **Replace this professional designation** to confirm the change. If you select **No, remain on this page** you are returned to the Change Professional Designation page.

> **Note:** The ONE® ID system validates a registrant's first name (legal and/or preferred), legal last name, Regulatory College and Registration Number against the Provider Registry when replacing the Professional Designation. If the college registration number does not match against the Provider Registry, the ONE® ID system will display an error message.

6. The updated **Registrant** profile screen is displayed with the modified Professional Designation.

5.2.7   Add Professional Designation

The following steps outline the process to add a registrant's Professional Designation, should a new or additional designation be provided.

1. From the **Registrant** profile screen, go the **Professional Designation** tab.

2. In the **Professional Designation** tab, click **Add**. This takes you to the **Professional Designation** screen.

3. In the **Regulatory College** drop down menu, make a selection.

4. Enter the **Registration Number.** The Registration number is mandatory if you have selected a Regulatory College.

> **Note:** The ONE® ID system validates a registrant's name (legal and/or preferred), Regulatory College and Registration Number against the Provider Registry when adding the Professional Designation. If the college registration number does not match against the Provider Registry, the ONE® ID system will display an error message.

5. Click **OK**.

6. The updated **Registrant** profile screen displays with the added Professional Designation.

5.2.8   Remove Professional Designation

The following steps outline the process to remove a registrant's Professional Designation.

1. From the **Registrant** profile screen, go the **Professional Designation** tab.

2. Next to the document to be removed, click on **Change**. This takes you to the **Change Professional Designation** screen.

3. From the drop down menu, select **Not Applicable** from the list provided.

4. Click **OK** and a confirmation box appears.

5. Click **Replace this professional designation** to confirm the change. If you select **No, remain on this** page you are returned to the Change Professional Designation page.
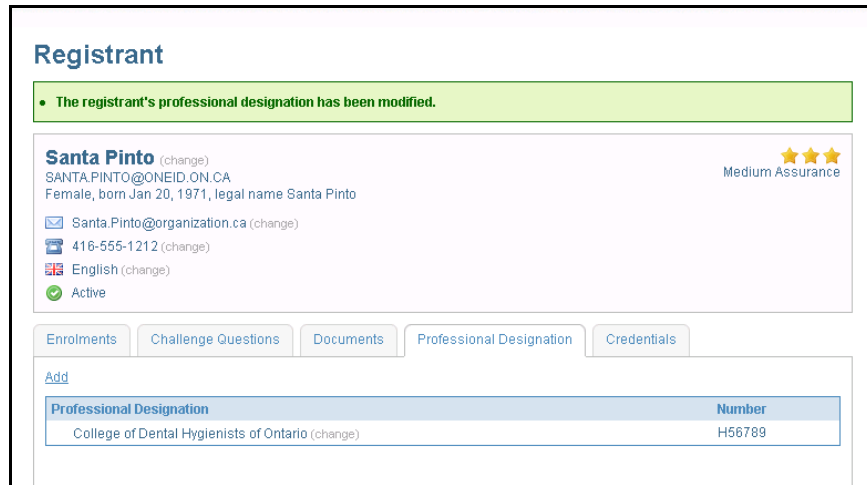
6. The updated **Registrant** profile screen appears, no longer displaying the Professional Designation.

5.3 Enrolment Modifications

This process allows for the modification of Enrolments or Roles. The following modifications can be performed: Addition, Suspension, Reinstatement or Revocation of Enrolments or Roles. Sponsorship is required in order to perform any of these modifications. Only those enrolments or roles used by your organization are available for selection.

5.3.1   Manage Enrolments and Roles

Manage Enrolments or Roles lets you select the type of modification required.

1. From the **Registrant** profile screen, go to the **Enrolments** tab and click **Manage Enrolments and Roles**. This displays the enrolment modification options.

2. Select the modification to be performed:

    a.   Add Enrolments or Roles

    b.   Revoke Enrolments

      c.   Delete Roles

      d.   Suspend Enrolments

      e.   Reinstate Enrolments

      f.   Change Enrolment Attributes

5.3.2   Add Sponsored Enrolment or Role

Adding a sponsored enrolment or role is the process by which one or more enrolments or roles are added to a registrant at the request of a sponsoring organization. The following is the process of adding a sponsored enrolment or role.

> **Note:**   Before adding a sponsored enrolment, ensure that the eHealth Ontario portal is not suspended. If suspended, notify Ontario Health ONE ID Registration Agents before attempting to add a sponsored enrolment.
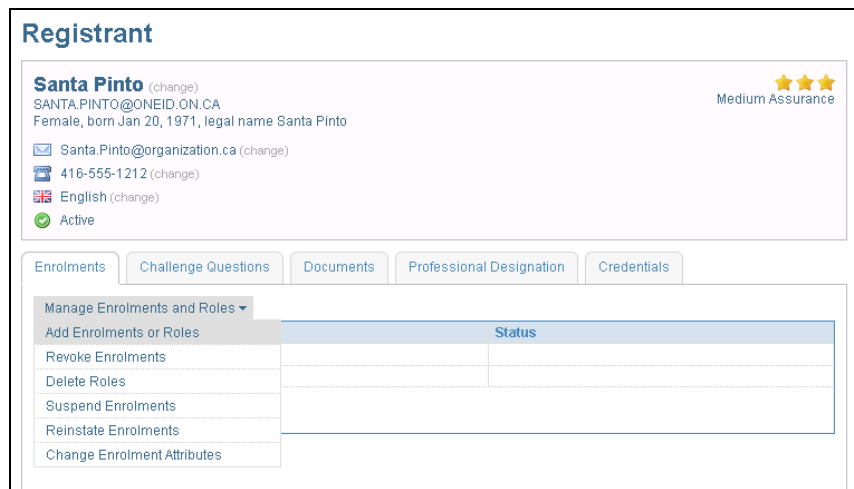
1.   From the **Enrolments** tab, click **Manage Enrolments and Roles**. This displays the enrolment modification options.

2.   Click on **Add Enrolments or Roles**. This takes you to the **Add Enrolments or Roles** screen.
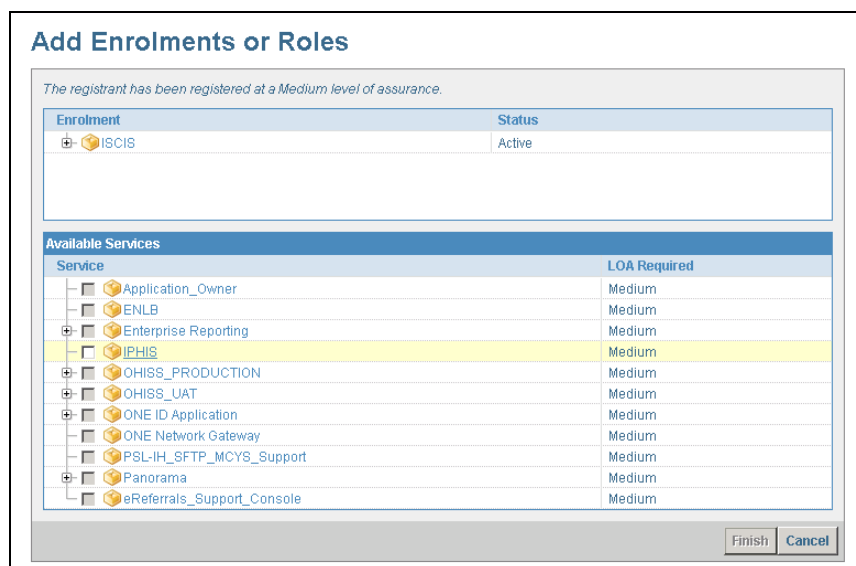
The top window displays a list of active services in which the user is currently enrolled in. All available services for the sponsoring organization are listed below. Some Services may appear greyed out. These Services are currently not available for selection and may be available for future releases of the ONE® ID System.

3.   From the list of Available Services, select the enrolment(s) and/or role(s) to be added.

> **Note:** To display a list of roles available for the selected enrolment, click +. Mandatory roles are not displayed as they are automatically provisioned

4.   The system presents the option of **Finish** if no attributes are required or **Next** if the enrolment contains attributes to be entered.

   a.   Click **Finish**, if there are no attributes to enter (proceed to step 7)

   b.   Click **Next**, if there are attributes for the selected enrolment that must be entered (proceed to next Step)
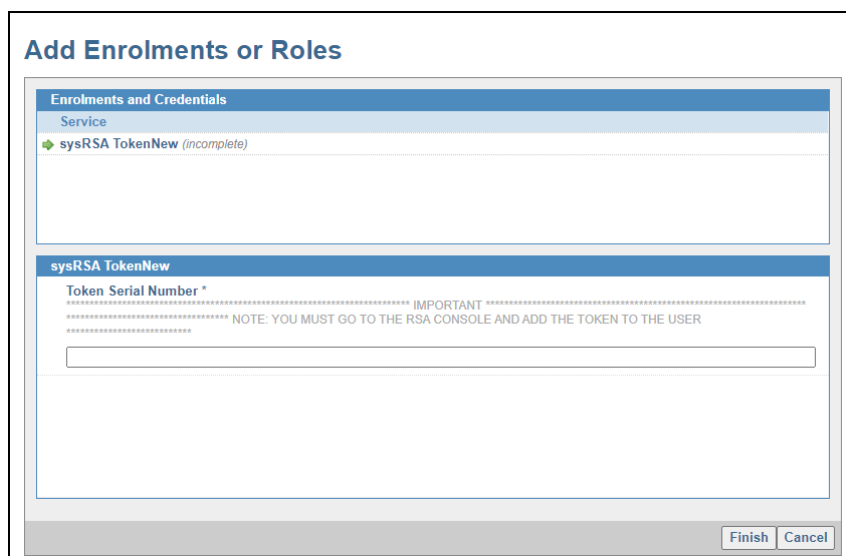
5. Enter the attributes associated to the selected enrolment.

> For enrolments requiring a token, enter the token serial number. You will need to assign the token to the user in the RSA Console, please refer to the RSA Console User Guide for ONE ID Local Registration Authorities for further details.

> If you are adding an enrolment that requires a token and the registrant has an existing token, you are not prompted to enter a token serial number.

> If you have run out of tokens, enter 00000000 in the Token Serial Number field and contact the Ontario Health ONE ID Registration Agents. See Appendix D – Requesting Replacement Tokens for more details.

6. Click **Finish**.
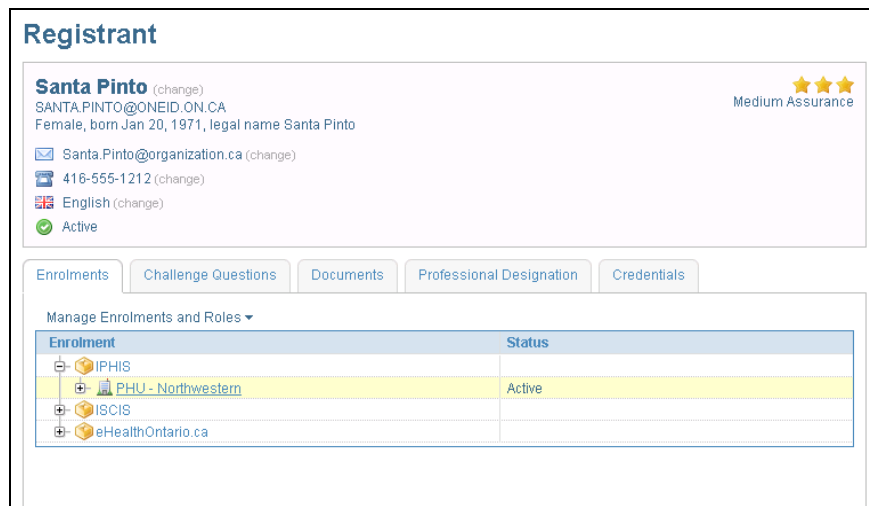
7. The updated **Registrant** profile screen displays. The new enrolment(s) are provisioned and you can view them in the **Enrolments** tab.

> The status of the enrolment may be displayed as Temporarily Unavailable. The enrolment is in the process of being provisioned and appears as Active once the provisioning has been completed. Wait a few minutes and refresh the page to view the updated status. If the enrolment fails to provision after 30 minutes, contact the Ontario Health Digital Support Desk.

5.3.3   Suspend Sponsored Enrolment

Suspending a sponsored enrolment is the process by which one or more enrolments are suspended at the request of a sponsoring organization. Suspending an enrolment temporarily suspends the registrant's access to the service. A registrant's enrolments may be suspended due to extended leave or absence, compromised credentials, etc. Only the organization that authorized an enrolment may request that the sponsorship be suspended. The following is the process of suspending sponsorship.

1. On the **Enrolments** tab click **Manage Enrolments and Roles**. This displays the enrolment modification options.

2. Click **Suspend Enrolments**. This takes you to the **Suspend Sponsorship** screen.

3. From the list of enrolments:

   a. select the enrolment(s) to be suspended;

      or

   b. Click on **Select All Enrolments** if all enrolments are to be suspended.

4. Select the **Suspension Reason** from the drop down menu. See <u>Appendix A</u> for suspension reasons.

5. Enter the Flag as candidate for reinstatement date.

   Note: Flag date is for reporting purposes only. Enrolments are not automatically reinstated on that date.

6.   Click **OK**.
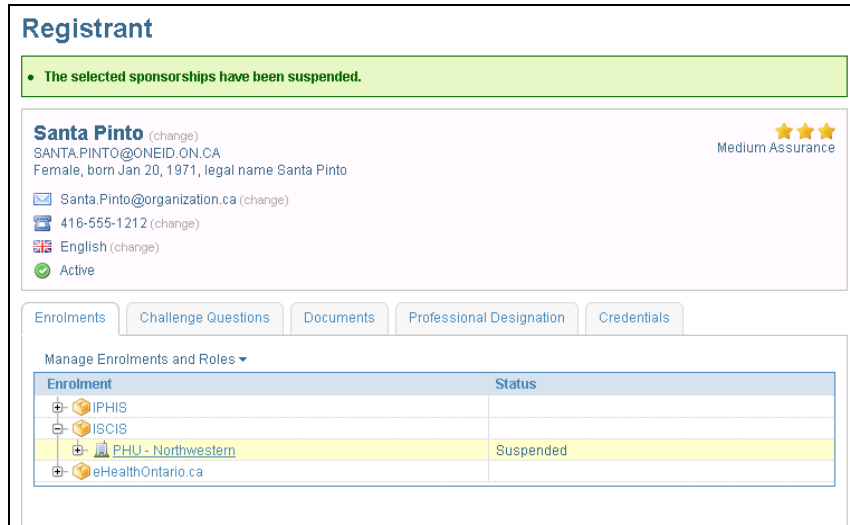
7.   The updated **Registrant** profile screen displays. The Enrolment(s) should now have a status of **Suspended**.

For suspended enrolments that use a token, the token is automatically disabled unless there are any other token-dependant enrolments.

The status of the enrolment may be displayed as Temporarily Unavailable. The enrolment is in the process of being provisioned and appears as Suspended once the provisioning has been completed. Wait a few minutes and refresh the page to view the updated status.

5.3.4   Reinstate Sponsored Enrolment

Reinstating a sponsored enrolment is the process by which one or more enrolments are reinstated at the request of a sponsoring organization. Reinstatement of an enrolment allows access to the service to which the registrant had access prior to the suspension. A registrant's enrolments may be reinstated due to the registrant returning from an extended leave of absence, etc. The following is the process of reinstating sponsorship.

1.   On the **Enrolments** tab, click **Manage Enrolments and Roles**. This displays the enrolment modification options.

2. Click **Reinstate Enrolments**. This takes you to the **Reinstate Sponsorship screen.**

3. From the list of enrolments:

    a. select the enrolment(s) to be reinstated;

    or

    b. Click **Select All Enrolments** if all enrolments are to be reinstated.

Note: Authorization must have been received prior to reinstating an enrolment.

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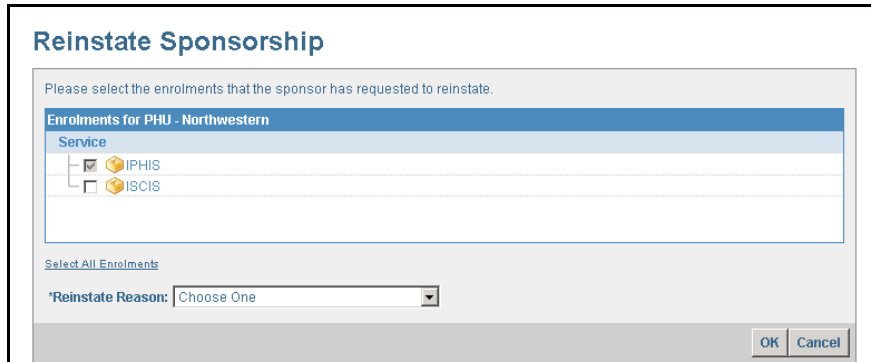
4. Select the **Reinstate Reason** from the drop down menu. See <u>Appendix A</u> for reinstatement reasons.

5. Click **OK**.
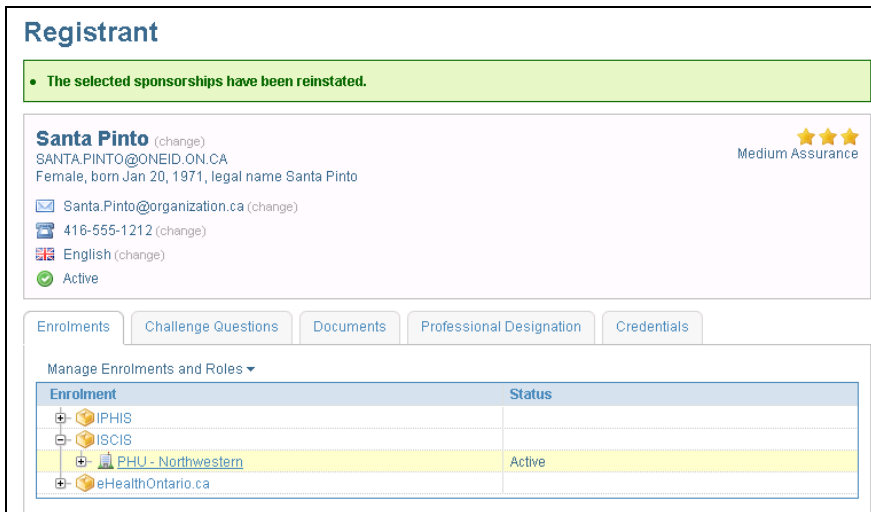
6. The updated **Registrant** profile screen is displayed. The Enrolment(s) should now have a status of **Active**.

    The status of the enrolment may be displayed as Temporarily Unavailable. The enrolment is in the process of being provisioned and appears as Active once the provisioning has been completed. Wait a few minutes and refresh the page to view the updated status.

> **Note:** If a new token is to be issued to the registrant as a result of the registrant's reinstated sponsored enrolment, you must assign the token to the user in the RSA Console or contact the Ontario Health Digital Support Desk.

5.3.5   Revoke Sponsored Enrolment

Revoking a sponsored enrolment is the process by which one or more enrolments are revoked at the request of a sponsoring organization. Once you have revoked an enrolment, you cannot reinstate it. If the registrant subsequently requires access, the enrolment must be added as a new enrolment, provided that the appropriate authorization has been received. A registrant's enrolments may be revoked if access to a service is no longer required; the registrant has left the organization, etc. The following steps describe the process of revoking sponsorship.
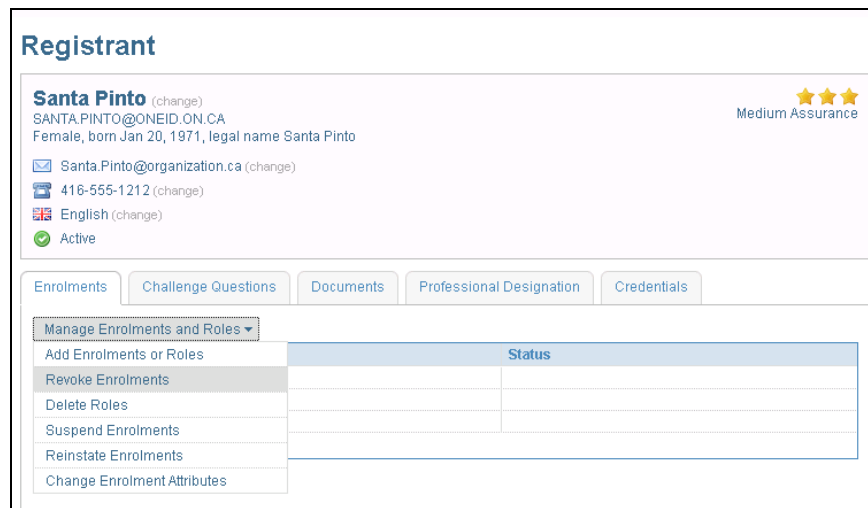
1.   On the **Enrolments** tab click **Manage Enrolments and Roles**. This displays the enrolment modification options.

2.   Click **Revoke Enrolments**. This takes you to the **Revoke Sponsorship screen**.

3.   From the list of enrolments:

   a.   select the enrolment(s) to be revoked;

        or

   b.   Click **Select All Enrolments** if all enrolments are to be revoked.

> **Note:** If the enrolment to be revoked is needed to maintain use of other active enrolments, the system notifies you, and then prompts you to confirm the revocation.
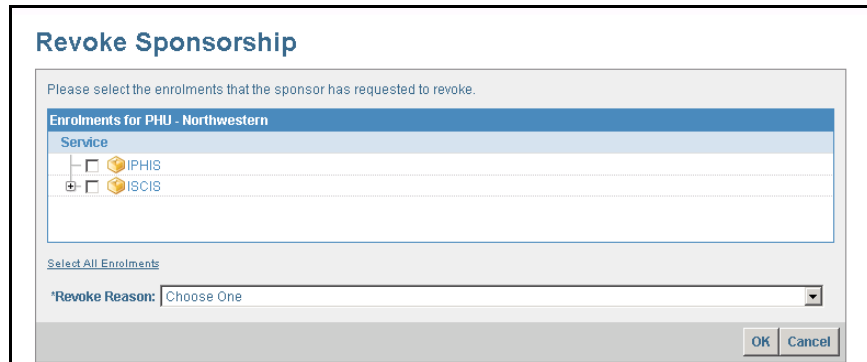
4. Select the **Revoke Reason** from the drop down menu. See <u>Appendix A</u> for revocation reasons.

5. Click **OK**.
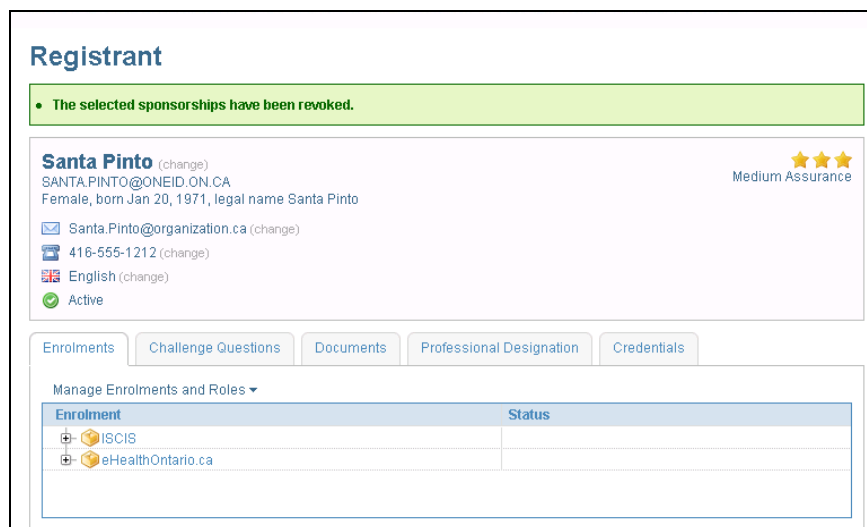
6. The updated **Registrant** profile screen is displayed and the revoked enrolment(s) is longer displayed in the enrolment listing.

For revoked enrolments using a token, the token is automatically unassigned within 24 hours unless there are any other token-dependant enrolments.

5.3.6 Delete Roles

Deleting a sponsored role is the process by which one or more roles are revoked at the request of a sponsoring organization. Once you have revoked a role, you cannot reinstate it. If the registrant subsequently requires the role, it must be added as a new role; provided that the appropriate authorization has been received. The role(s) may be revoked if the registrant no longer requires access to the role(s). The following is the process of revoking a role.
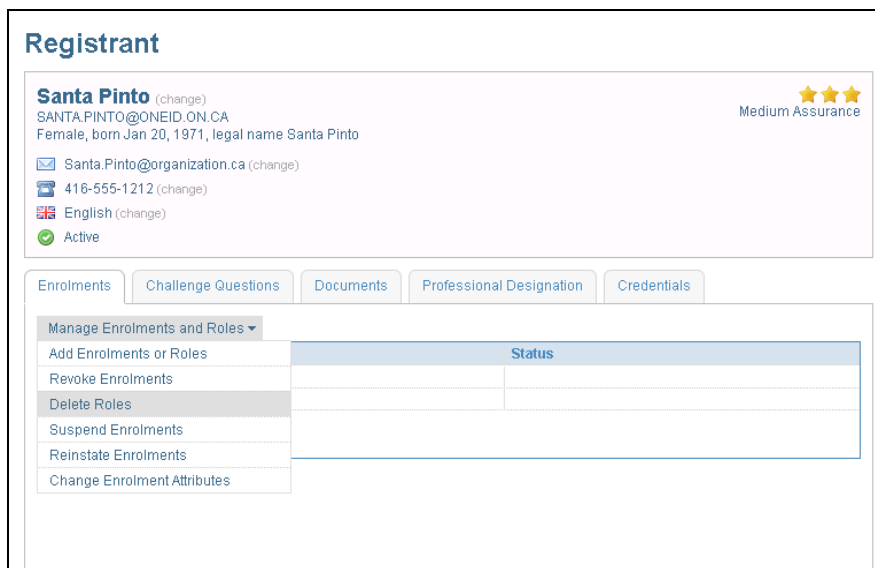
1. On the **Enrolments** tab click **Manage Enrolments and Roles**. This displays the enrolment modification options.

2. Click **Delete Roles**. This takes you to the **Delete Role** screen.
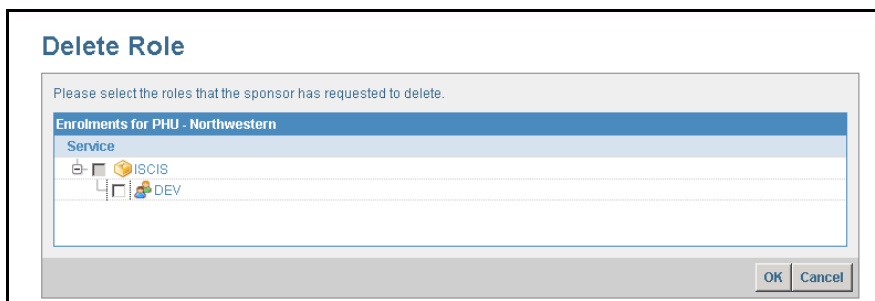
3. A list of all non-mandatory roles is displayed. Expand the enrolment to view the role to be deleted. Select the role(s) to be revoked.

4. Click **Ok**.
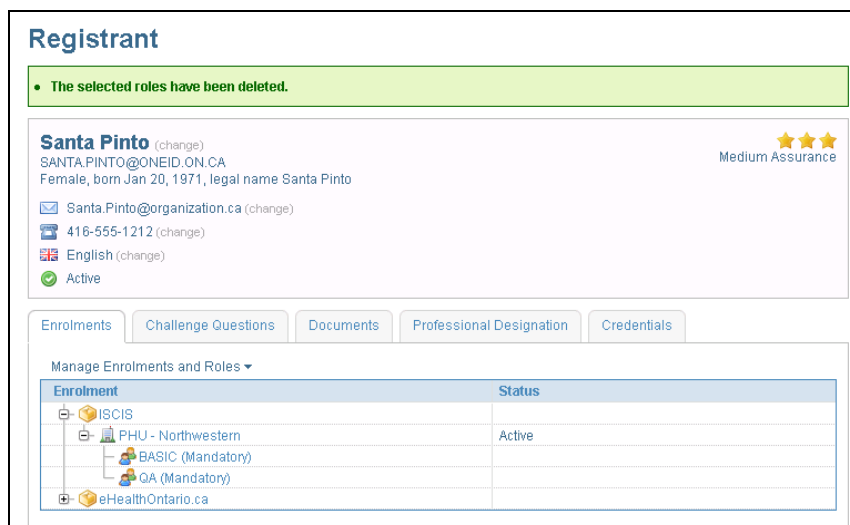
5. The updated registrant profile is displayed and the role no longer shows in the enrolment listing.

5.3.7   Change Enrolment Attributes

A sponsoring organization may request a modification to a registrant's enrolment attributes. A registrant's enrolment attributes may be modified as the result of a role change or if an incorrect value has been entered for the enrolment.

1. On the **Enrolments** tab, click **Manage Enrolments and Roles**. This displays the enrolment modification options.

2. Click **Change Enrolment Attributes**. This takes you to the Change Enrolment Attributes screen.

Only enrolments that have attributes that can be modified (and which the registrant has an active enrolment for) appears at the top of the window.

3. **Under the Enrolments and Credentials** window, select the enrolment for which the attributes need to be modified.

4. Modify the attributes and click **OK.**

The updated **Registrant** profile screen is displayed confirming that the registrant's enrolment attributes have been modified.

6.0 Guidelines to Protecting Personal Information

As an LRA, you are responsible for protecting the privacy and security of the Personal Information collected during the registration process

- Do not retain any of the identity documents – originals or photocopies

- Do not record any information about an individual other than the information requested in the ONE® ID system.

- Store any temporarily retained registration paperwork in a locked cabinet

- Log out of the ONE® ID system when not in use

- Use the screen lock functionality every time you leave your computer

- If available, make use of a privacy screen for your monitor

- Never share your password and/or RSA token

- Do not email completed registration forms

- Upon confirmation of user registration, handle all original forms in accordance with your organizations Privacy, Security and document management policies

7.0 Glossary

Term	Definition
Authentication	Validation of an individual's identity when the user attempts to access a health care application.
Authorization	Decision as to what services a user is entitled to access. An individual receives authorization to access a health care application though an enrolment process involving sponsorship by the custodians of the health care application or their delegates.
Challenge Question	A question chosen by a registrant with an answer that is known to the registrant and should be kept secret from others. The registrant's identity is assumed valid if the registrant can provide the answers that correspond to his or her questions.
Credential	A document, secret knowledge, or combination of which that allows its holder to be authenticated by another party. ONE® ID credentials may include a password, secure token, PKI certificate.
eHealth Service	Electronic health service offered to healthcare providers and patients in the province of Ontario for which ONE® ID registration is required.
Enrolment	The process of enrolling a Registrant as being authorized to access specific Service(s). Enrolment assumes that Registration has established identity to a specified Level of Assurance.
Identity Document	A document issued to an individual by an authoritative source that contains the information necessary to verify the individual's identity. ONE® ID specifies a list of acceptable identity documents and classifies them as Primary or Secondary.
Level of Assurance (LOA)	A classification assigned to each registrant that represents the rigour to which proof of the registrant's identity is gathered. The classification is used in determining the registrant's eligibility for access to services.
Login ID	An identifier that is unique in the system that is provided to the registrant to use to log in to use services.
Registrant	An Individual, Computer Application or Organizational Unit which has been registered and assigned a unique identity as an End User of the Ontario Health information infrastructure for purposes other than the management of the information infrastructure.
Registration	Process that establishes an individual's electronic identity and provides electronic credentials for the individual allowing them access to health care applications.
Sponsoring Organization	An organization that has entered into an agreement with Ontario Health to perform defined duties with respect to identifying Individuals, Organizational Units and Computer Applications for registration in the eHealth Ontario information infrastructure and for enrolment in a specific Service.

8.0 Appendix A – Valid Values

8.1 Service Desk Challenge Questions

1. What was your nickname as a child?

2. Who was your first employer? (e.g. name of company)

3. What year did you leave home?

4. What was your mother's first job?

5. What is the middle name of your father?

6. What is your oldest sibling's middle name?

7. What school did you attend for sixth grade?

8. What was the name of your first stuffed animal?

9. What city or town was your mother born in?

10. What was your maternal grandfather's profession?

11. Name of first pet?

12. What is your paternal grandmother's maiden name?

13. What was the first movie you ever saw?

8.2 Titles

- Dr

- Miss

- Mrs

- Ms

- Mr

- (blank)

8.3 Preferred Languages

- English

- French

8.4 Identity Documents

8.4.1 Acceptable Primary Identity Documents

Identity Document Name	Expiry Date	Photo
Birth Certificate issued by a Canadian Province or Territory	No	No
Canadian Certificate of Birth Abroad	No	No
Canadian Certificate of Indian or Métis Status	Yes	Yes
Canadian Permanent Resident Card	Yes	Yes
Certificate of Canadian Citizenship	No	Yes
Certification of Naturalization	No	No
Citizenship Identification Card issued by a foreign jurisdiction	Unknown	Unknown
Confirmation of Permanent Resident (IMM 5292)	Yes	No
CANPASS	Yes	Yes
Nexus	Yes	Yes
Firearm Registration License	Yes	Yes
Permanent Resident Card	Yes	Yes
Driver's License	Yes	Yes
Canadian Passport	Yes	Yes
Foreign Passport	Yes	Yes
Statement of Live Birth from Canadian Province (Certified Copy)	No	No
Citizenship and Immigration Canada Refugee Protection Claimant Document	Yes	Yes
Ontario Photo Card	Yes	Yes

8.4.2 Acceptable Secondary Identity Documents

Identity Document Name	Expiry Date	Photo
Old Age Security Card	No	Unknown
Certificate issued by a government ministry or agency	No	Unknown
Canadian Convention Refugee Determination Division Letter	No	Unknown
Canadian Employment Authorization	Yes	Unknown
Canadian Minister's Permit	Yes	Unknown
Canadian Immigrant Visa Card	Yes	Unknown
Canadian Student Authorization	Yes	Unknown
Record of Landing (IMM 1000)	Yes	Unknown
Change of Name Certificate	No	Unknown
Current Registration Document from the College of a Health Profession	Unknown	Unknown
Current Professional Association License/Membership Card	Unknown	Unknown
Federal, Provincial, or Municipal Employee Card	Unknown	Unknown
Current Employee Card from a Sponsoring Organization	Unknown	Unknown
Union Card	Unknown	Unknown
Other Federal Id Card, including Military	Unknown	Unknown
Ontario Ministry of Natural Resources Outdoors Card	Unknown	Unknown
Judicial ID Card	No	Unknown
Student Identification Card	No	Unknown
BYID Card (Formerly Age of Majority Card)	Unknown	Unknown
CNIB Photo Registration Card	Unknown	Unknown
Canadian Police Force Identification Card	Unknown	Unknown
Blind Persons Right Act ID Card	Unknown	Yes

8.5 Sponsorship Suspend Reasons

- This registrant is on a leave of absence from this organization.

- This registrant no longer has the level of assurance necessary to be enrolled in this service.

- Other

8.6 Sponsorship Reinstate Reasons

- This registrant has returned from leave.

- Other

8.7 Sponsorship Revoke Reasons

- This registrant no longer requires access to this service.

- This registrant is no longer associated with this sponsoring organization.

9.0 Appendix B – Verification and Sponsorship

The following are the functions that can be performed based on selection of Authorized Sponsor on the Verification and Sponsorship screen.

Authorized by Sponsor Selected						
Function	**Registrant Profile**	**Preferences**	**Enrolments**	**Challenge Questions**	**Documents**	**Professional Designation**
New Registration	• Add	• Add • Change	• Add enrolments	• Add • Change	• Add • Change	• Add • Change
Modify Registration	• Change	• Add • Change	• Add enrolments or roles • Revoke enrolment • Delete roles • Suspend enrolments • Reinstate enrolments • Change enrolment attributes	• Change	• Add • Change	• Add • Change
Authorized by Sponsor Not Selected						
Function	**Registrant Profile**	**Preferences**	**Enrolments**	**Challenge Questions**	**Documents**	**Professional Designation**
New Registration	NO	NO	NO	NO	NO	NO
Modify Registration	• Change	• Add • Change	• Read Only	• Change	• Add • Change	• Add • Change

10.0   Appendix C – Enrolments

The following table lists enrolments that are in the ONE® ID system. Only those enrolments used at your organization are available to you for registration and/or enrolment. For LRA Registrations and/or Enrolments, submit the LRA registration and enrolment form to Ontario Health ONE ID Registration Agents for processing.

Enrolment Name	Attributes	Roles
Application Owner	Title/Position E-Mail	User*
CCO Site		User* eClaims eReports Ectas iPort iPort Access ORRS
DPV	Physician Pharmacist Pharmacy Technician Nurse Administrative Clerical MOHLTC Employee Other	User*
ENLB	Facility ID Initial Effective Date	User*
eHealth Services Portlet		Lab Diagnostic Imaging
IPHIS		User*
ISCIS		Basic* QA* Dev
OHISS_ Production (OHISS_UAT must also be provided)	Business Phone Number Business E-Mail	Token User (must be selected)
OHISS_ UAT	Business Phone Number Business E-Mail	Token User (must be selected)
ONE Mail Direct	Email Prefix	User Room
Panorama	Health Unit Organization User Role(s) User Services Delivery Location(s)	User CCM-BI Inventory Training
Panorama (Subsidiary Account)	Health Unit Organization User Role(s) User Services Delivery Location(s)	User CCM-BI Inventory
RSA Lab Automation		User*

* Indicates a mandatory role.

11.0   Appendix D – Requesting Replacement Tokens

11.1 No tokens for New Registration or enrolment

If you have performed a registration and/or enrolment but have run out of RSA SecurID tokens, complete the following steps.

1.   Enter a serial number of 00000000 in the Token Serial Number field to complete the enrolment.

2.   Contact Ontario Health ONE ID Registration Agents at ONEIDRegistrationAgents@ontariohealth.ca advising that a registration and/or enrolment has taken place using the following template.

Subject:
New Registration Token Assignment

Body:
Assign a token for new *<state enrolment>* user
Name: FirstName LastName
Login Name: First.Last@oneid.on.ca

Also, kindly send me replacement tokens as we no longer have any on site.

Your Name
Your Organization and Site Name
Address
Phone number

Ontario Health assigns a token to the registrants and couriers it along with the requested replacements to you.

11.2 Replacement tokens for Lost, Damaged or Reinstated Enrolments

If you are replacing a token due to lost or damaged tokens, or a new token is being issued due to reinstatement of a sponsored enrolment

1.   Telephone or email the Ontario Health Digital Support Desk at 1-866-250-1554 or OH-DS_servicedesk@ontariohealth.ca asking to replace the registrants token using the following template.

Subject:
Assign Replacement Token

Body:
Assign replacement token *<provide serial number>* to *<state enrolment>* user
Name: FirstName LastName
Login Name: First.Last@oneid.on.ca

Your Name
Your Organization and Site Name
Address
Phone number

12.0   Appendix E – Account Status

The following describes the various statuses a registrant's account can have.

Pending Self-Complete
This status indicates that the registrant has yet to log in for the first time and self-complete their registration either after an initial account creation or password reset. The registrant must self-complete their registration prior to accessing their services.

Revoked
This status indicates that the registrant's account and all enrolments have been revoked. The registrant's profile is read only and cannot be modified.

Suspended
A suspended status indicates that a registrant's account, including all enrolments, has been temporarily suspended. The registrant cannot access any of their services while their account is suspended. The registrant's profile is read only and cannot be modified. To reinstate a registrant's account, the request must be submitted to Ontario Health ONE ID Registration Agents.

Locked
The status of an account appears as locked if there has been a maximum number of failed password attempts, or the account password has been expired for more than 180 days. Assurance Level Two (AL2) users cannot access their account and must obtain a password reset from the Ontario Health Digital Support Desk. Assurance Level One (AL1) users may recover their password at any time and unlock their account without calling the Ontario Health Digital Support Desk.

Active
This status indicates that the registrant has self-completed their registration and has activated their account. The account is available to be modified.

13.0   Appendix F – Panorama

13.1 Sponsorship

The following organizational units are currently the only sponsors for the Panorama service.

a) Public Health Units (PHUs)

b) Ministry of Health and Long Term Care - Health Services Cluster

c) Ministry of Health and Long Term Care - Ontario Government Staff (includes Ontario Government Pharmacy (OGP) staff).

13.2 Registration

Existing ONE® ID registrants who have been authorized for enrolment to Panorama; must have the minimum level of assurance (LOA) required for access to the Panorama service i.e. Assurance Level 2 (AL2) also known as Medium LOA.

Existing ONE® ID registrants with Assurance Level 1 (AL1) (Rudimentary LOA), must meet with their LRA to undergo additional identity validation to upgrade their ONE® ID account to AL2. Upgrades to an assurance level and/or updates to Panorama user information should be applied to the user's existing ONE® ID account without resulting in multiple ONE® ID accounts for the same user (Some exceptions do apply, if you are unsure, please contact the Ontario Health Digital Support Desk). For further information on how to update a user's identity documents, please refer to section 5.2.4 Modify Identity Documents.

The **only** scenario that warrants a separate ONE® ID account (i.e. multiple ONE® ID accounts for the same user) is for existing users who require access to the Panorama Training environment. The Login ID format will be created distinctively so registrants can identify their account FirstName.LastNameTR@ONEID.ON.CA. For further details on the Panorama Training enrolment, please refer to section 13.3.3 Enrolling a User in Panorama with Training Role.

A registrant's account can only contain the Panorama enrolment for one Sponsoring Organization. Once this enrolment has been added to a registrant's profile, it will not be available for selection again in the ONE® ID Online System.

13.3 Enrolment

To add the Panorama enrolment and applicable role(s) using the ONE® ID Online System, please follow the below steps:

1. Log into the ONE® ID Online System, and the Home Page opens. From here, select **New Request, Individua**l and you will be directed to the **Verification and Sponsorship** screen.

2. The system will display your name as the LRA performing the registration and/or enrolment, enter the **Verified On** date (Date selected should be the same date you verified the registrants identity information).

3. Confirm that sponsorship has been received for the request. If the request has been authorized, put a check in the box next **to Authorization for this request was received from a recognized sponsor.**

1. Select the Sponsoring Organization

2. In the list of available services, verify that the service enrollment being requested (Panorama) is available for the selected sponsoring organization. If the requested service is not listed, contact the Ontario Health Digital Support Desk at 1 866 250 1554.

3. Click **Next**.

4. Identify the registrants ONE® ID account to be enrolled and/or modified by performing a search. Enter the **Login ID** (first.last@oneid.on.ca) or **Regulatory College** to search for an existing registrant. If you do not have this information, enter the full identity information for the registrant under **Provide Identity Information**.

5. Click **Search**.

6. Select the radio button next to the registrant's profile you wish to modify (existing users only).

7. Click **Modify Registration** for an existing account or select **New Registration** if the applicant is new.

> **Note:** For new registrants, please follow steps **4.3 View Registrant Profile** to **4.7 Add Identity Documents** before continuing with the below steps.

8. From the registrants profile page, navigate to the Enrolments tab and click **Add Enrolments or Roles**. This takes you to the **Add Enrolments or Roles** screen.

> **Note:** If authorization from a recognized sponsor was not selected on the Verification and Sponsorship screen, you cannot add any enrolments.

9. Select the Panorama enrolment and applicable role(s) that have been authorized for the registrant. There are several roles available for the Panorama enrolment (CCM-BI, Inventory and User). Select the checkbox next to the role(s) the registrant has been authorized for and click **Next**.

10. Enter the enrolment information and additional attributes as specified in the sponsorship request from the authorized sponsor directly in the required fields in the system (the information may also be found under Part 1 – Applicant Details in the enrolment form where a form has been completed).

11. Incomplete is indicated next to each enrolment that requires attributes to be entered, fill in the enrolment attributes for Panorama enrolment; these are user Health Unit organization, role(s) and services delivery location(s).

Role(s) indicated on the enrolment attribute screen is used by the administrator to create the user account directly in the Panorama application. If a modification is required for these attributes, please contact the Panorama Administrator directly at the Ministry.*

Access to the Panorama application from the eHealth Ontario portal requires second factor Authentication in the form of a secure token along with the user's ONE® ID Login ID and password.

12. Enter the **Token Serial Number** in the field, click **Finish**. Note: You must also complete the token enrolment in RSA i.e. You will need to assign the token to the user in the RSA Console, please refer to the RSA Console User Guide for ONE ID Local Registration Authorities for further details. **(step 3, under 4.8 Add Enrolments)**

> **Note:** If the registrant already has an RSA token for one or more of their other services e.g. the Integrated Public Health Information System (IPHIS), you will not be prompted to add a token as the user can use their existing ONE® ID token.

In the event that you have run out of tokens, enter 00000000 in the Token Serial Number field and contact the Ontario Health Digital Support Desk to assign a token. **See Appendix D** for Details.

> ➤ For existing users you will see a message in highlighted in green confirming that the registrant has been successfully enrolled into the Panorama service with authorized roles under the sponsoring organization you have selected.

> ➤ For new Registrants, click **Save** at the bottom of the page. Confirmation that the registrant record has been successfully saved is displayed along with the Login ID and temporary password. The registrant receives an automatic enrolment into the eHealth Ontario Portal.

If you entered a token that you have on hand, please provide it directly to the user along with their Login ID and/or temporary password (if applicable).

13.3.1 Panorama Administrator

When a user is enrolled into Panorama or their enrolment is modified in the eHealth Ontario ONE® ID Online system, the Panorama Administrator will receive a system generated email notification with the enrolment information. This information is used by the authorized Panorama Administrator to create user accounts and configure role-based access permissions within the Panorama application itself.

> ➤ If the registrant is a new Panorama user and is being enrolled in any of the roles, the enrolment attributes will be requested. I.e. Health Unit organization, role(s) and service delivery location(s).

> ➤ If a registrant already has a Panorama enrolment/role in their profile and a new role is being added to the profile, the enrolment attributes will not be requested again.

> ➤ An email notification will be generated for the following Panorama enrolment/role modifications:

> > o Panorama enrolment added to a new or existing Registrant.

> > o Additional Panorama role added to an existing registrant

> > o Panorama enrolment is revoked

> > o Panorama role is deleted

13.3.2 Enrolling a User in Panorama with Inventory Role

Ministry of Health and Long Term Care - OGPMSS was the initial organization sponsoring users for Panorama inventory role however all PHUs can now sponsor eligible users for the service. The appropriate organization must be selected in the ONE® ID system for enrolment purposes.

13.3.3 Enrolling a User in Panorama with Training Role

If a user has been authorized to access the Panorama Training Environment, a new and separate ONE® ID account must be created for the user, even if they have an existing ONE® ID account. The registration information from the existing ONE® ID account i.e. personal information must be used to create the new account.

A distinct ONE® ID Login ID must be created for access to the Panorama training environment so it can be easily identified. The Login ID that must be created for the Panorama training ONE® ID account is **FirstName.LastNameTR@oneid.on.ca**.

> **Note:** Only the Panorama Training role can be added to the FirstName.LastNameTR@ONEID.ON.CA account. If any other service enrolment or Panorama role is added to this account, access to the service will be denied.

The initial steps to select the correct sponsoring organization for the user's enrolment will follow the general process outlined above; however creating the actual training user account will entail the following steps:

13.3.4 Identify the individual

1. Enter and complete all the mandatory fields with the personal information for the user, note that the information entered in the last name field automatically populates to the legal last name field. Then add **TR** to the last name field only and ensure that the legal last name field <u>does not contain</u> **TR,** otherwise modify the legal last name field to contain only the Legal Last name.

2. Click **Search**.

13.3.5 Potential matches for the individual's identity

3. If the user already has a ONE® ID account, the system will alert on possible matches found with existing records, check the box for double checked and click the new registration button.

13.3.6 Enter the individual's preferences and registration information

4. Complete the registrant screen with all the required information to bring the account to AL2 (also known as medium level of assurance). Information from an existing account should be reused where possible.

However professional designation numbers **must not** be added to the TR account created for training access; this is to prevent the account from being auto enrolled to other services that provide access to users who have professional designation numbers added to their account. Training account must be used specifically for access to the training environment.

Registration has been completed at assurance level 2 (medium level of assurance).

Note: Professional designation numbers **must not** be added to the TR account since it is specifically created for access to the training environment; this is to prevent the account from being auto enrolled to other services that provide access to users who have professional designation number in their profile.

13.3.7 Add the enrolment and role to the registrant's profile

5. Click the **Enrolments** tab and click **Add Enrolments or Roles.**

6. Select **Panorama** as the enrolment and **Training** as the role.

While other roles are available for selection, only the training role can be added to the account since it is exclusively for access to the training environment, any other service enrolment or Panorama role will not work on this account.

13.3.8 Enter the Enrolment Attributes

7. These are mandatory information which must be entered before clicking the finish button. A token is not required to be entered.

Click **Save** to complete the registration and enrolment process.

8. The registrant's account is now saved, provide the user with their credentials and have them self-complete the account to activate it.

- Users will access the Panorama Training environment via the eHealth Ontario portal with their TR account credentials .i.e. Username and Password.

- A token is not required for access to the Panorama Training environment; instead, users will are required to answer two out of their three online Challenge Questions for the second factor authentication. (These can be the same as the questions the user has entered in their current ONE® ID account).

- In other words a user accessing the training environment will require their ONE® ID login ID, password and be able to provide the correct answers to their challenge questions when prompted to do so.

13.4 Requesting multiple enrolments for a user's access

Panorama is a single sponsor enrolment; in other words only one Panorama enrolment can be associated with a user's ONE® ID account regardless of the sponsoring PHU. When a user needs to access Panorama application at multiple public health units (e.g. a nurse who works in more than one public health unit) a parent and subsidiary account must be set up for the user rather than create multiple registration records.

To achieve this:

- User must have a parent ONE® ID account and be enrolled for Panorama access at the primary PHU where the user operates with this parent account. The LRA can create the initial account if it does not already exist.

- LRA can send a request by email with the enrolment form to Ontario Health ONE ID Registration Agents to provision a unique user ID for access at other PHU location(s) where the user is eligible and has been sponsored for access. A subsidiary account will be created by the Registration Agent to accommodate the request.

  - As an example, if the user operates at two PHUs – Peel and Toronto, with Peel being the primary location of operation, the user's parent ONE® ID account will contain the Panorama enrolment sponsored by Peel while the subsidiary account will contain the secondary enrolment sponsored by Toronto.

  - The administrator will configure each of the two user accounts to have access to the data for only Peel or Toronto respectively so that the user cannot view both sets of data at the same time, in other words the user cannot view Toronto's data when they located at Peel and vice versa.

- The user will have to manage multiple accounts and each account will have its own RSA token.

- Existing ONE® ID user ID format of **firstname.lastname@oneid.on.ca** from the parent account will be replicated for the subsidiary account; however with a number added to the prefix to create a new unique user ID.

Example:

To represent the parent vs subsidiary structure for a user it will look like the following:

User's Name	Master -Primary PHU Account	Subsidiary -2nd PHU Account	Subsidiary-3rd PHU Account
Jane Doe	jane.doe@oneid.on.ca	jane.doe1@oneid.on.ca	jane.doe2@oneid.on.ca

In the event that there is a second Jane Doe she will get the following user IDs:

User's Name	**Master -Primary PHU Account**	**Subsidiary -2nd PHU Account**	**Subsidiary-3rd PHU Account**
Jane Doe	jane.doe**3**@oneid.on.ca	jane.doe**4**@oneid.on.ca	jane.doe**5**@oneid.on.ca

In the future if the first Jane Doe requires additional new sub account, she will get jane.doe**6**@oneid.on.ca

13.4.1 Create the parent account under the primary sponsoring organization

As an example a parent account will be created for Lulu Bright (LULU.BRIGHT@ONEID.ON.CA) under the primary sponsoring organization - Health Services Cluster if the account does not already exist.

Send a request to Ontario Health ONE ID Registration Agents to create the subsidiary account for additional subsequent ID requested under a different sponsoring organization. (Sample enrolment form template is further below)

13.4.2 Enrolment and role added to the subsidiary account

A subsidiary account LULU.BRIGHT1@ONEID.ON.CA has been created for the user under the new PHU by Ontario Health ONE ID Registration Agents and Panorama enrolment has been added to the account.
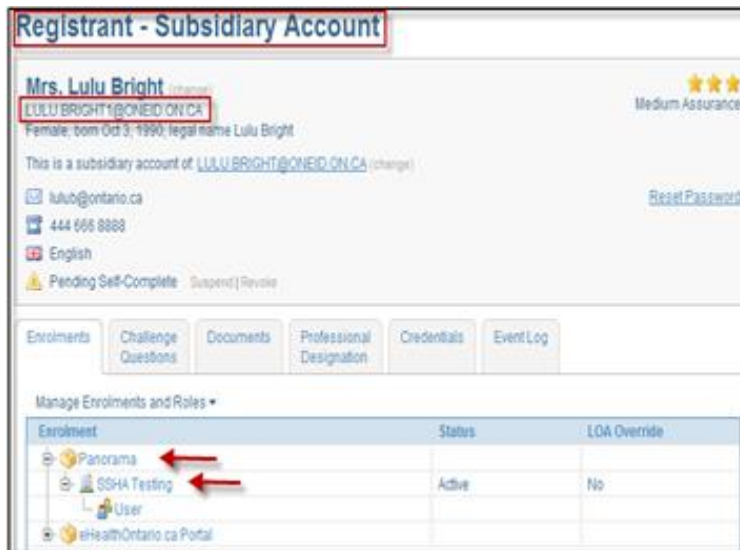
Primary account

Subsidiary account

13.4.3   Receive completion notification from Ontario Health ONE ID Registration Agents

Upon completion of creating additional ID(s) for a user, Ontario Health ONE ID Registration Agents will send a notification to inform the LRA and associated token with each respective ID will be couriered to the LRA.

13.4.4   Verify enrolment and role added to the subsidiary account

Search the user's profile and ensure that accounts have been created and provisioned appropriately
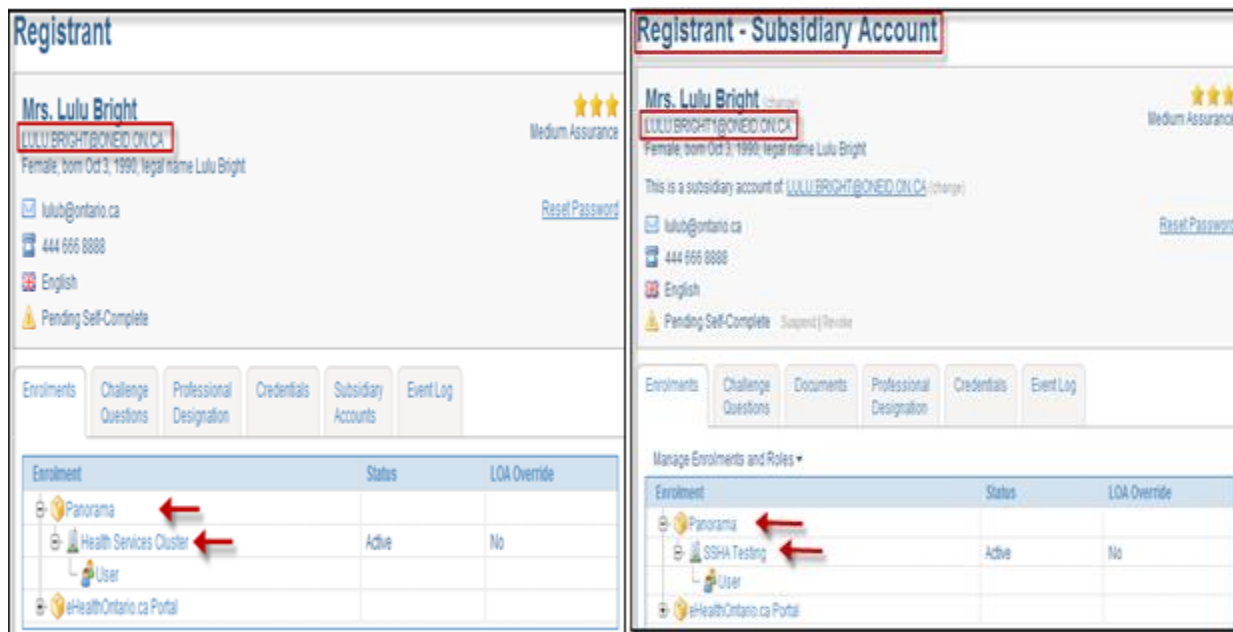
Primary account   **Subsidiary account**

13.4.5 Information to include in email request

Send e-mail request (along with the completed Panorama enrolment form) for additional unique username for a user to Ontario Health ONE ID Registration Agents at ONEIDRegistrationAgents@ontariohealth.ca with the following information:

For the user's existing ONE® ID account (parent account), please specify the username and the name of PHU the user is currently enrolled under.

For the new additional account being requested, specify the following:

a) User's First Name

b) User's Last Name

c) Requesting Organization Name (sponsoring organization)

d) Sponsor's Name and Designation

e) LRA Name

f) Type of enrolment/role (**Note: User and Inventory are the only roles available for the subsidiary account)**

g) List attributes (Health Unit organization, role(s) and service delivery location(s))

Panorama Service Enrolment for Existing Registrants

Ontario
eHealth Ontario

Form Completion Instructions

Before proceeding with the enrolment request, the user must be registered with an @oneid.on.ca account. If the user is not registered, please do so using the ONE ID LRA online tool.

1. This form must be completed for each existing registrant who:
   a) requires enrolment into any of the specified Panorama roles
   b) is working at more than one PHU concurrently (subsidiary account is required)
2. All fields <u>must</u> be completed as specified.
3. The Local Registration Authority must email the completed form to registration.agents@ehealthontario.on.ca for processing.
   Do not submit any personal information via email including: Gender, Date of Birth, and Identity Document Information

Part 1 – Registrant Information

First Name	Last Name

Login ID (firstname.lastname@oneid.on.ca)

Part 2 – Sponsor Information

Sponsoring Organization Name and Location* Health Unit Name (e.g. Twin Falls Health Sciences Network – ABC General Hospital)

Sponsor's First Name	Sponsor's Last Name

Sponsor's Business Telephone *(incl. Extension)*	Sponsor's Business Email

This request was authorized by the above sponsor via: ☐ Email ☐ Memo ☐ Other (specify):

Does the user require a subsidiary account for multiple PHU access? ☐ Yes (complete B below) ☐ No (complete A below)

A. Complete this section for enrolment into Panorama	B. Complete this section if a subsidiary account is required
Service Enrolment* ☐ Panorama	**Service Enrolment *** ☐ Panorama
Role(s)* ☐ User ☐ CCM-BI ☐ Inventory ☐ Training	**Role(s)*** ☐ User ☐ CCM-BI ☐ Inventory

Panorama Role(s)* (Required by Panorama administrator to create user account in Panorama application, check applicable role(s))

☐ Immunization View Only   ☐ Immunization Management   ☐ Immunization Full Clinical   ☐ Immunization Provider

☐ Immunization Full Administrative ☐ Immunization Reminder/Recall ☐ Immunization Data Entry ☐ Immunization Data Import/Export

☐ Immunization Duplicate Management   ☐ Immunization PHU Superuser ☐ Inventory PHU Clerk 1 ☐ Inventory PHU Clerk 2

☐ INVENTORY Customer Service Clerk 1 ☐ INVENTORY Customer Service Clerk 2 ☐ INVENTORY Warehouse Service Clerk 1

☐ INVENTORY Warehouse Service Clerk 2 ☐ INVENTORY Procurement Clerk 1   ☐ INVENTORY Procurement Clerk 2

☐ INVENTORY Superuser Role

Part 3 – Local Registration Authority Information

First Name	Last Name

Login ID (firstname.lastname@oneid.on.ca)

Sample of email enrolment form to request a subsidiary account

14.0   Appendix G – Diagnostic Imaging Enrolments

The eHealth Services Portlet-Diagnostic Imaging enrolment requires further provisioning once you have added the enrolment to a users ONE ID account. This step is completed based on the enrolment you the LRA has taken, and does not require any further action on your part. Please advise the user that they must allow up to 7 Business days before they can access the Diagnostic Imaging Portlet.