

## OTNinvite Scheduling by Delegate

If you are a delegate for another OTN user, you can schedule an OTNinvite on their behalf.

A delegate can join the OTNinvite event on its scheduled date.

Events have a maximum of 20 participants, which includes the host/consultant, the invited participants, and the delegate.

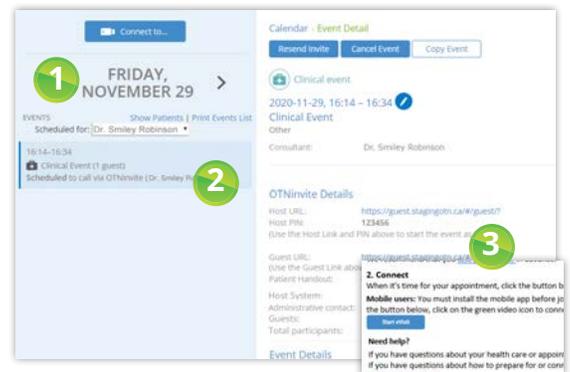
For more information about managing OTNinvite events, see the [Using OTNinvite](#) user guide.

### Table of Contents

- Viewing the Calendar and Event Details ..... 1
- Scheduling and Sending an Invitation ..... 2
- OTNinvite Fields ..... 3
- Joining an Event as a Delegate/Guest from an Email Invitation ..... 4
- Joining an Event as the Host ..... 5
  - Hosting via OTNhub ..... 5
  - Hosting via a Mobile Device ..... 6

## Viewing the Calendar and Event Details

- 1 Using the **Calendar** panel, navigate to the event's scheduled date, select your desired **Delegator\***, and locate the event in the **Events List** (which shows the Guest names).
- 2 To view the **Event Details**, click its Events List entry.
- 3 On the event's scheduled date, as a delegate you can:
  - [Join the event as a delegate \(via email invite link\).](#)
  - [Join the event as the host \(via the OTNinvite Host URL\).](#)



### OTNinvite event in delegate's calendar

15:00–15:30

Clinical event (3 patients)

**Scheduled** to attend (Host system name)

### OTNinvite event in delegator's calendar

15:00–15:30

Clinical event (3 patients)

**Scheduled** to call by OTNinvite

\* If you are a delegate, a "Scheduled for" field appears at the top of the Events List and delegator names are listed alphabetically by last name. If you are not a delegate, this field does not appear.

# Scheduling and Sending an Invitation

1. Log in at [otnhub.ca](https://otnhub.ca):

- If you are on the landing page:
  - To invite a *non-OTN member* (e.g., a patient), type their email address in the **Connect with a Patient at Home** panel, click **Go**.
  - To invite an *OTN member* or room-based system, in the **Make a Video Call** panel, click **Go**.
- Or from anywhere in the OTNhub, click **Videoconference** in the bottom navigation bar and then:
  - Click **Connect to...** at the top of the **Events List**, or
  - Click the **Actions & Favourites** icon in the top banner and in the Actions section of the panel, click **Connect to...**.

A **Connect to** pop-up appears.

2. Click **Guest Via OTNinvite** near the top right corner.

3. Fill in the required fields.

(See [OTNinvite Fields](#) on page 3.)

- Type the **Guest name(s)** and **Guest email(s)**.
- If the guest is a patient who will use video visits for the first time, consider [patient eligibility](#).
- Select the name\* of the person you're **Scheduling on behalf of**.
- Leave the auto-generated **Host PIN** or set your own custom Host PIN.
- If desired, set the optional **Guest PIN**.

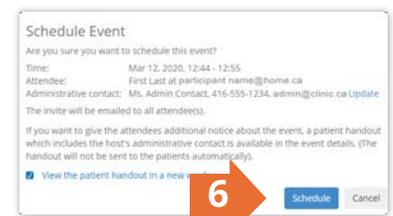
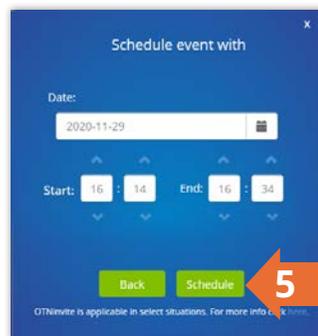
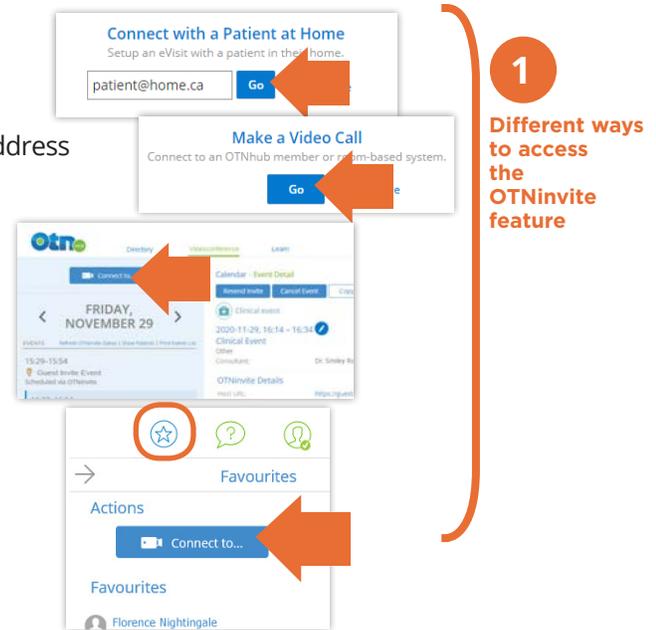
4. Click the **Schedule & Send Invite** button. A Schedule pop-up appears.

5. Select the desired Date, Start time, and End time and then click **Schedule**.

6. Review the confirmation details.

- If you are scheduling a clinical event and you want to view a 'patient handout' summarizing the event details, leave the "View the patient handout..." checkbox selected.
- If you need to add or update **Administrative Contact** information, click the "update" link and follow the on-screen prompts.
- If all is correct, click **Schedule**.

- The videoconference is scheduled.
- An email invitation is sent and the OTNinvite event will appear in both your and the delegator's calendar Events List.
- Using the Event Details, you can edit the date, start and end times, and the number of patients.



\* If you are a delegate, the field appears and delegator names are listed alphabetically by last name.

## OTNinvite Fields

Field	Description
Guest Name and Guest Email	Type the name and email address of the person invited to the videoconference. If you want to invite more than one participant click <a href="#">Add guest</a> for each additional person and provide their name and email address. Events have a maximum of nineteen guests (plus one host). The invitee name appears in the Event Details (but not in the email invitation).
Patient Eligibility	A <a href="#">checklist</a> that can help you determine if a patient has the right equipment, skills, and knowledge for using video visits.
Schedule... on behalf of	Appears only if you have delegate permissions for another OTNhub user. When you select a name other than your own, the <b>Call</b> button becomes inactive. You can only schedule an event for another user (you cannot start an ad-hoc call).
Add Host PIN	The “host” PIN is required when you join an event using the Host URL from the Event Details or the “Start eVisit” link in the invitation email. (You do not need this PIN when you join an event using the event’s Call button.) <ul style="list-style-type: none"> <li>If you want the system to automatically create a unique host PIN for the session, leave the number that appears by default in the field.</li> <li>If you want to set a host PIN yourself, type a 6 digit number in the field.</li> </ul>
Add Guest PIN	To increase security, you can add a “guest” PIN that a participant must use to join the event. <ul style="list-style-type: none"> <li>If you want the system to automatically create a unique guest PIN for the session, leave the number that appears by default in the field.</li> <li>If you want to set a guest PIN yourself, type a 6 digit number in the field.</li> </ul> For privacy and security reasons, the email invitation does not include the PIN. You must contact the invitee yourself and provide them with the PIN.
Call Purpose	<b>Clinical</b> events involve at least one health care provider and one or more patients who will be discussed or will participate in the call. <b>Learning</b> events involve a speaker and an audience, such as conferences, interest group sessions, workshops, training programs, or lunch and learn sessions. <b>Meeting</b> events involve organizational, operational, or management content such as committees, working groups, project status reports, or interviews.
Event Title	Required for learning and meeting events. (For clinical events, if you don’t provide a title, the default title is ‘Clinical Event’.) Type a meaningful title in the field and to ensure readability use a title that is less than 100 characters.
# of patients to be discussed or seen	Appears for <b>Clinical</b> events. If more than one patient will be seen (or discussed) during the call, type the number of patients. You can edit this field after the event has occurred.
Patient Present?	Required for clinical events. Defaults to ‘present’. If no patient will be present during the call, select ‘not present’.
‘I am’	Required for clinical events. Leave the default value ‘I am’. The name you selected in the “Schedule on behalf of” field will appear as the consulting Health Care Provider (HCP) in the Event Details.
 Schedule & Send Invite	Click this button to open a <b>Schedule event with</b> dialog box. To select a date, click in the <b>Date</b> field and use the <b>Calendar pop-up</b> or type a date using the format YYYY-MM-DD. Select the desired <b>Start</b> and <b>End Times</b> or type the time using 24 hour format (e.g., type 14:00 for 2:00 p.m.)

## Joining an Event as a Delegate/Guest from an Email Invitation

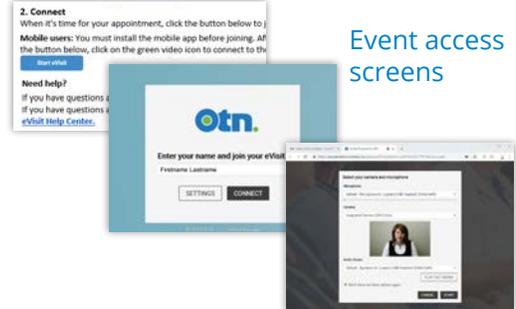
As a delegate, you can join an OTNinvite videoconference the same way that other participants join.

**Note:** The “permissions” pop-ups are different, depending on which browser you use.

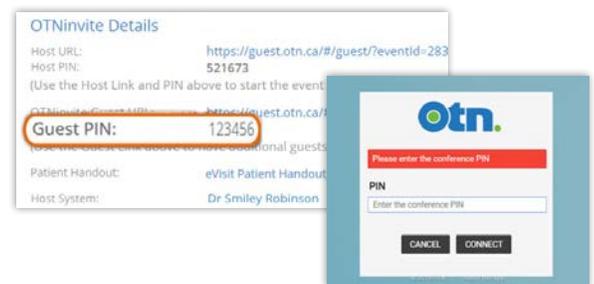
1. Open your email invitation and click **Start eVisit**.  
(Note: Your browser must be set to allow pop-ups.)  
An **OTN Log In** screen appears.
2. In the **OTN Log In** screen, type your name in the **Name** field and then click **CONNECT**.  
A **Select your camera and microphone** panel appears with your default devices selected.
3. Leave the default devices selected or change as desired and then click **START**.  
If no guest PIN is required, skip to step #5.
4. If a guest PIN is required, a **PIN code** pop-up appears. Type the **Guest PIN** identified in the Event Details and then click **CONNECT**.

**Note:** This is not the Host PIN. It is the *guest's* PIN created by the person who sent the invitation.

5. When connected, a video panel appears.
  - If you are the first participant to enter the conference, you will see a “*Waiting for the host...*” image in the large panel and your self-view at the top right.
  - If the host has already joined, you will see a video image as well as your self-view.



Event access screens



Guest PIN



Video in session

## Joining an Event as the Host

### Hosting via OTNhub

**Note:** As a delegate, you will not see a Call button for an event. Therefore, if you want to join as a “host” you need to use the Host URL in the Event Details.

1. Using the **Calendar**, navigate to the date on which the videoconference is scheduled and locate it in the **Events List**.

2. To view the videoconference’s **Event Details**, click its entry in the **Events List**.

3. You will need the **Host Pin** for step #7. Therefore, select the Host PIN text and copy [CTRL+C] to your system clipboard.

4. To start the call, click the **Host URL** in the Event Details.

A **Welcome to OTN** screen appears briefly followed by an **OTN Log In** screen.

5. In the **OTN Log In** screen, type your name in the **Name** field and then click **CONNECT**.

A **Select your camera and microphone** panel appears with your default devices selected.

6. Leave the default devices selected or change as desired and then click **START**.

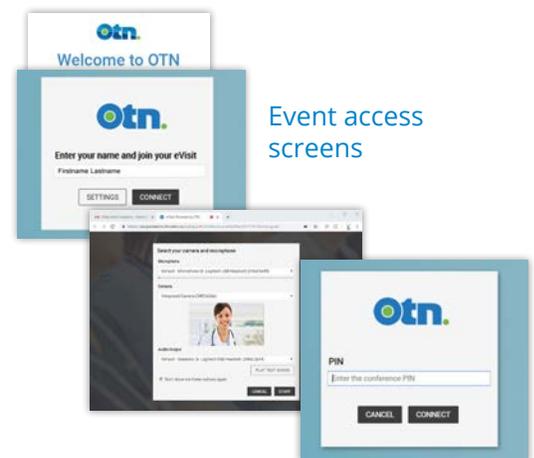
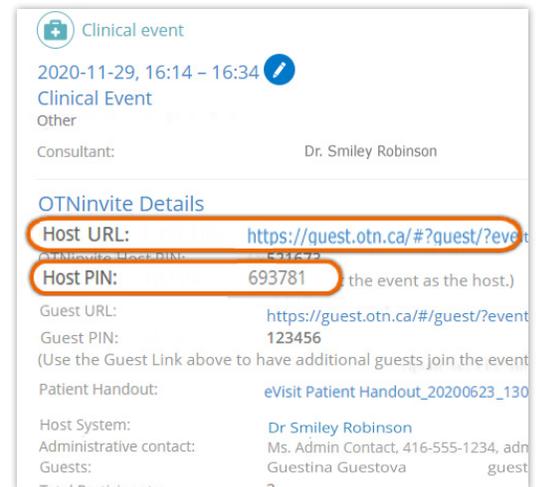
A **PIN** pop-up\* appears.

7. Paste [CTRL+V] the **Host PIN** you copied earlier from the Event Details into the PIN field, and then click **CONNECT**.

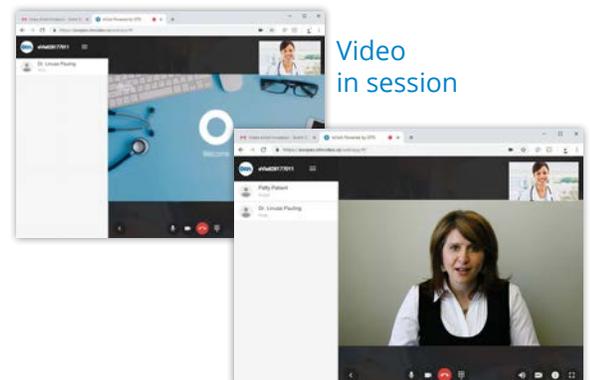
8. When connected, a video window appears.

- When you initially enter the conference, you will see a “Welcome” image in the large panel and your self-view at the top right.
- Only after you connect will the other participant(s) be allowed into the videoconference and when they’re connected the Welcome image will be replaced by a video image.
- As host, you have access to additional controls via the **Menu** (☰) button at the top left of the video screen. These include:
  - Add a new participant (Do not use; not applicable with OTNhub)
  - Lock conference
  - Mute all guests
  - Disconnect all participants

### Host URL and Host PIN in event details



### Event access screens



### Video in session

\* The PIN pop-up’s appearance depends on how many PINs the event requires.

- If the event requires both a Host PIN and Guest PIN, a simple PIN pop-up appears with just the PIN field. Enter the Host PIN.
- If the event requires only a Host PIN, the PIN pop-up contains both “Select your role” radio buttons and a PIN field. Leave the role “Host” selected and enter the Host PIN.

