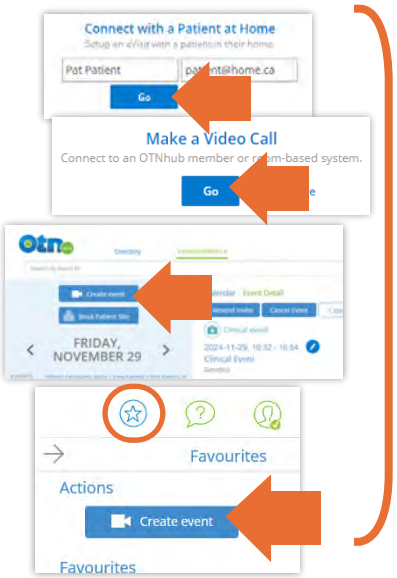
Quick Reference for Scheduling an eVisit

Scheduling an event and sending the email invitation



1 Different ways to access the eVisit feature

1. Log in at otnhub.ca:

- If you are on the landing page:
  - To invite a *non-member* (e.g., a patient), type their email address in the **Connect with a Patient at Home** panel, click Go.
  - To invite an *OTNhub member or room-based system*, in the **Make a Video Call** panel, click Go.
  - To access the Videoconference service, click **Videoconference** in the top navigation bar.
- If you are on the Videoconference **Calendar** screen:
  - Click Create event 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 Create event.

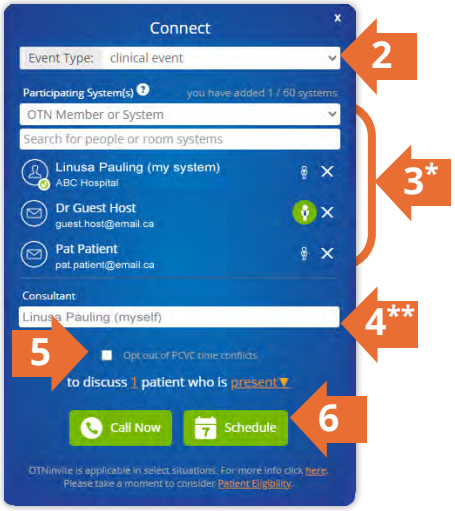
A **Connect to** pop-up appears.

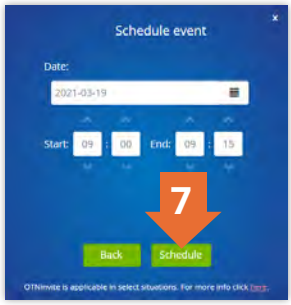
2. Select the Event Type (clinical, meeting, or learning).
3. For each participant*, select the type (OTN Member or System, Guest via email, or Non-OTN system) and fill in the required fields (*e.g.*, guest name, guest email, host PIN, guest PIN, etc.) and the event settings.

   Repeat for each additional person/system you want to invite. (Maximum participants: 60)
4. If a Consultant field** appears, select the **Consultant** (Host/Speaker/Chair).
5. If you are scheduling for a PCVC system and do not want OTNhub to check for scheduling conflicts, select **Opt out of PCVC time conflicts**.
6. Click Call Now or Schedule.

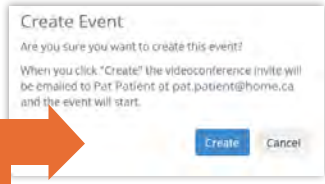
   If you are calling now, skip to step #8.
7. A Schedule pop-up appears. Select the desired Date, Start time, and End time and then click **Schedule**.

   A confirmation pop-up appears.
8. Review the confirmation details.
   i. If you are scheduling a future *clinical* event that includes an email guest, and you want to view a 'patient handout' summarizing the event details, select the "*View the patient handout...*" check box and review the "*Consent to personal health information in an OTNinvite email*" settings.
   ii. If all is correct, click **Schedule** or **Create**.

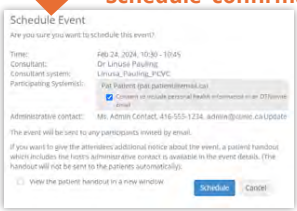




Call now' confirmation



'Schedule' confirmation



* When the Connect panel opens...

- If you do not schedule for another system, your system automatically appears in the Participating Systems list.
- If you schedule for only one other system, that system appears in the Participating Systems list (your own system does not appear).
- If you schedule for multiple systems, the Participating Systems list is empty, and you must add your delegator's system (and your own system if you will attend).

** Consultant field appears only if a non-OTN participant (email or non-OTN standards-based system) is identified as the host.

When you send the invitation, the following happens

If you selected an immediate start time (Call Now)*:

Invitee(s):

- OTNhub sends an email which includes the scheduled date and time and a link to the video visit.
  - If you specified a PIN, you need to give this to each participants yourself.
  - If the event includes multiple participants, each person is sent the email invitation via "blind cc".
- They can use the link in the invitation email to join your video visit. Instructions are available at eVisit Help Centre.

eVisit – Start Now

You:

- When connected, a "Welcome" video panel appears and you will see only yourself in the self-view picture-in-picture at the top-right of the video panel.
- Only after you connect will the other participant(s) be allowed into the video visit and the Welcome screen is replaced by a video image.
- The video visit is added to your **Events List** and its **Event Details** become available.
- You do not receive a copy of the invitation email.

Your Admin Contact (if set up in your Videoconference Settings):

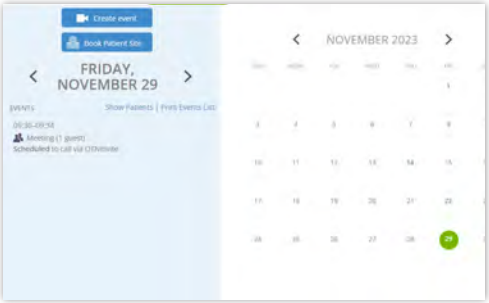
- For non-clinical events, the Admin Contact receives a copy of the email invitation.
- For clinical events, the Admin Contact does not receive a copy (only the invitee receives the email invitation).

If you selected a future start time (Schedule):

If you have not opted out of conflict checking, the system checks your eVisit calendar for conflicts.
If your system is already booked for the specified date and time, an error message appears at the top of the panel.
Select a different date or time and then click the **Schedule and Send Invite** button again.

If there are no conflicts:

eVisit – Scheduled Event



Invitee(s):

- OTNhub sends an email which includes the scheduled date and time and a link to the video visit.
  - If you specified a PIN, you need to give this to each participant yourself.
  - If the event includes multiple participants, each person is sent the email invitation via "blind cc".
  - Is sent a second copy of the email one day before their scheduled event. (It is sent between 5 am – 6 am the day before the event so they will have 24+ hours notice).

You:

- For clinical events, if you selected to view a patient handout, a new browser tab opens with the event's summary. If you did not select a patient handout, the eVisit (Videoconference) calendar displays the scheduled date.
- For non-clinical events, the eVisit (Videoconference) calendar displays the scheduled date.
- The video visit is added to your **Events List**.
- You do not receive a copy of the invitation email.
- If you are a delegate scheduling on behalf of the host, you receive a copy of the email invitation.

Your Admin Contact (if set up in your Videoconference Settings):

- For non-clinical events, the Admin Contact receives a copy of the email invitation.
- For clinical events, the Admin Contact does not receive a copy (only the invitee receives the email invitation).

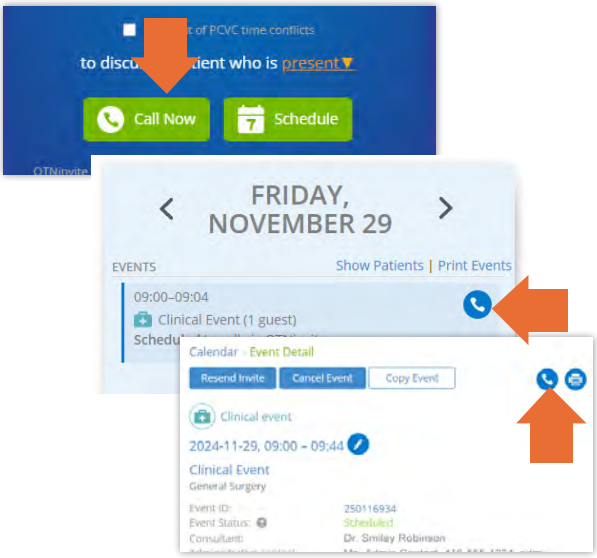
* If you are a delegate scheduling on behalf of another user, you can only schedule an event. The Call button is inactive.

Connecting as a Host from OTNhub

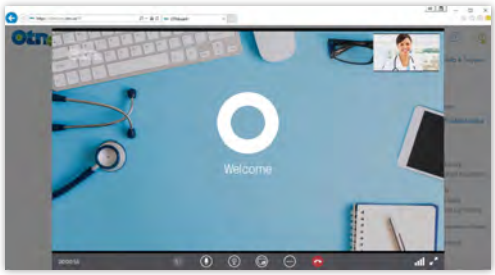
To start an unscheduled video visit that begins immediately, when you create the invitation, click the Call Now button.

To start a scheduled video visit on the day of the event, click the **Call** button that appears in the Events List and in the Event Details.

1. When you click **Call Now** or the **Call** button, a video window appears.
   - You are automatically identified as the host.
   - When you initially enter the conference, you will see a "*Welcome*" image in the large panel with your self-view at the top right.
   - Only after you connect will the other participant(s) be allowed into the video visit and when they're connected the Welcome image will be replaced by a video image.
2. For multi-point calls, after all participants have joined the meeting, take a roll call and then lock the video visit. This helps prevent privacy incidents.
3. The video visit controls are the standard ones, as described in the user guide Using the Video Window.



Video welcome screen



Video in session

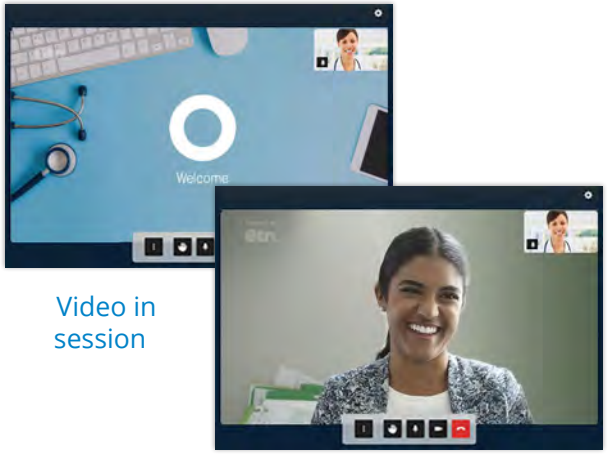
Connecting via Host URL from an email on a mobile device

Notes: You will need the Host URL and Host PIN.

The host's delegate* can copy [CTRL+C] these items from the OTNhub **Event Details** and paste [CTRL+V] them into an email,which they send to the event's host.

1. Open a browser window and enter the Host URL.
   Or if you received the Host URL in an email, tap the link.
2. Follow the on-screen prompts to open and access the app.
   - In the **Hello, What's your name** panel, enter the Name** you want shown to other participants.
   - If a **Permission** panel appears, allow the app to access your camera and microphone.
3. To join the eVisit, tap Join now.
4. If asked "**Are you the host?**", select Yes and enter the **Host PIN**.
5. When connected, a video window appears.
   - If you are the first participant to enter the conference, you will see a "*Welcome*" image in the large panel and your self-view at the top right.
   - After other participants join, you will be connected and see both them and your self-view.
6. To end the conference, tap anywhere in the video image to show the control bar and then tap the **End Call** button.

Event access screens



Video in session

* A delegate is someone who is associated with the host's system and has permission to schedule that system using OTNhub and Ncompass.

** The name entered is what others will see during the video visit. To protect your identity and limit what personal information will be seen by others, take the time to check that the name is correct and accurate.

Connecting via Host URL from OTNhub on Windows (PC) or Mac

In some circumstances, a delegate might need to join as a 'host.

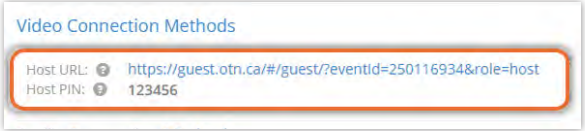
To do this they must use the Host URL because a Call button does not appear for delegates. For example, when a delegate notices that a patient has already joined an event and they want to temporarily join as a host to notify the patient about the doctor's pending arrival.

Always use the Host URL **from within OTNhub**. Do not email the link as this might cause privacy issues.

1. Using the **Calendar**, navigate to the date on which the video visit is scheduled and locate it in the **Events List**.
2. To view the video visit's **Event Details**, click its entry in the **Events List**.
3. You will need the **Host PIN** for step #8. 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.
5. A few panels will appear, where you can enter your name and check your equipment. Complete each panel and to continue, click **Next**.
   - In the **Hello, What's your name** panel, enter the Name* you want displayed to other participants.
   - If a **Permission** panel appears, allow the app to access your camera and microphone. (Permission is needed only for the first time you join an eVisit or after you clear your browser's cache.)
   - You can check that your equipment is working and change as needed.
     - Change the camera, microphone, or speakers using the drop-down lists.
     - You can also "Test your microphone" or "Test your sound".
6. To join the meeting, click Join now.
7. If the event does not have a Guest PIN, an "Are you a Host" pop-up appears. Select Yes.

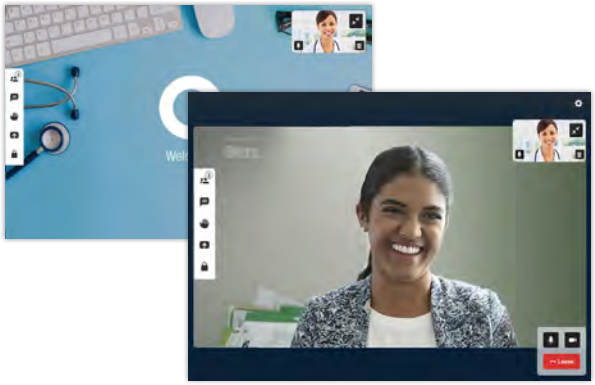
   "*What's the PIN for this meeting*" pop-up appears.
8. Enter the **Host PIN** and then click Next.
9. When connected, a video window appears.
   - When you initially enter the conference, you will see a "*Welcome*" image in the large panel with your self-view at the top right.
   - Only after you connect will the other participant(s) be allowed into the video visit and when they're connected the Welcome image will be replaced by a video image.
   - As host, you have access to several options for controlling the meeting. See Hosting Group Video Visits.

Host URL and Host PIN in event details



Event access screens

Video in session



* The name entered is what others will see during the video visit. To protect your identity and limit what personal information will be seen by others, take the time to check that the name is correct and accurate.

Re-sending an eVisit Invitation

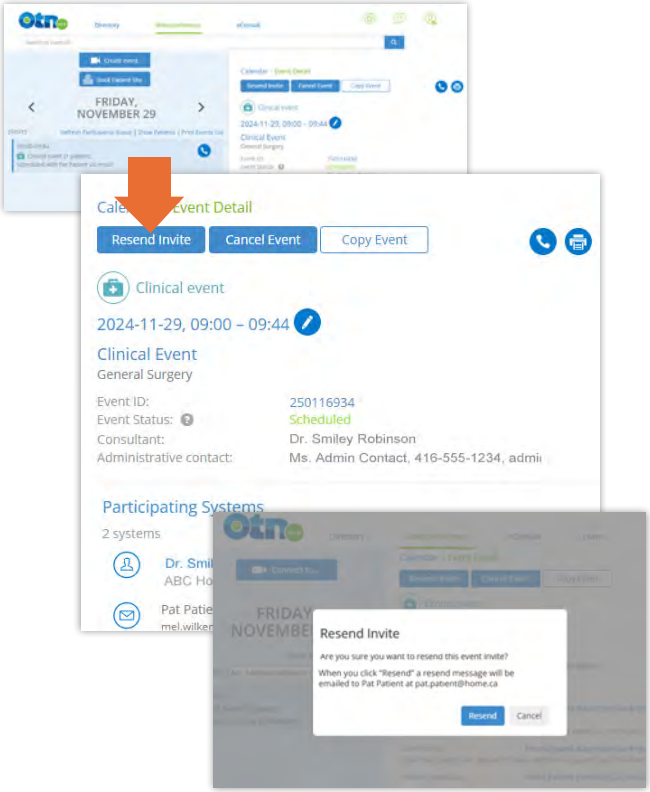
You can re-send an email invitation to a future scheduled video visit. For example, if your invitee cannot find their original invitation.

The re-sent invitation email contains exactly the same information as the original invitation.

1. Using the **Calendar** panel, navigate to the date on which the video visit is scheduled and locate its entry in the Events List.
2. To view the event details, click its **Events List** entry.

   The **Event Details** panel appears.
3. To re-send the invitation, click Resend Invite.

   A confirmation dialog box appears.
4. Review the names and email addresses to ensure that they are correct.
5. To confirm the re-sending, click Resend.
   - All invitees are sent an email notifying them of the video visit, which includes the scheduled date and time and a link to the video visit.
   - For non-clinical events, if you have set up an Admin Contact they are sent a copy of the email. (This does not happen for clinical events.)
   - If you are a delegate re-sending on behalf of the host, you will not receive a copy of the email.
   - A success message appears.



Copying an eVisit event

You can copy an eVisit event, including scheduled events which have occurred in the past, scheduled events planned for the future and cancelled events.

For example, if you need to create a follow up appointment that has the exact same information as the original event (guest name, guest email, consultant, etc.).

1. Using the **Calendar** panel, navigate to the date on which the video visit is scheduled and locate its entry in the Events List.

2. To view the event details, click its **Events List** entry.

   The **Event Details** panel appears.

3. To create the new event, click Copy Event.

   A **Copy Event** pop-up appears containing information from the original event.

4. Review the required fields and change as needed: participants, host PIN, guest PIN, Opt out option, and the event settings (event type, title, etc.).

   If you want to invite additional participants, select the participant type and complete the required fields. (Maximum participants: 60)

5. Click Call Now or Schedule.

   If you are starting now, skip to step #7.

6. If you are scheduling a future event, a Schedule pop-up appears. Select the desired Date, Start time, and End time and then click **Schedule**.

   A confirmation pop-up appears.

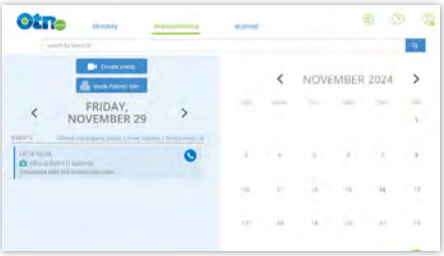
7. Review the confirmation details.

   i. For each OTNinvite participant, review the **Consent to include personal health information in an OTNinvite email** and change as needed.

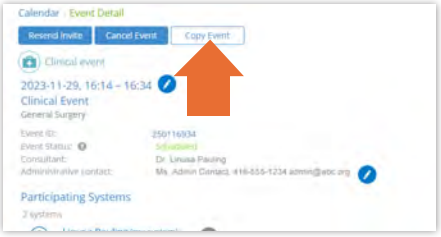
   ii. If you are scheduling a future *clinical* event that includes an email guest, and you want to view a 'handout' summarizing the event details, select the "*View the patient handout...*" check box.

   iii. If all is correct, click **Schedule** or **Create**. If you need to change something, click Cancel.

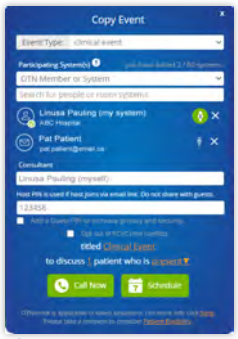
For descriptions of what happens next, see Call Now on page 2 or Schedule on page 2.



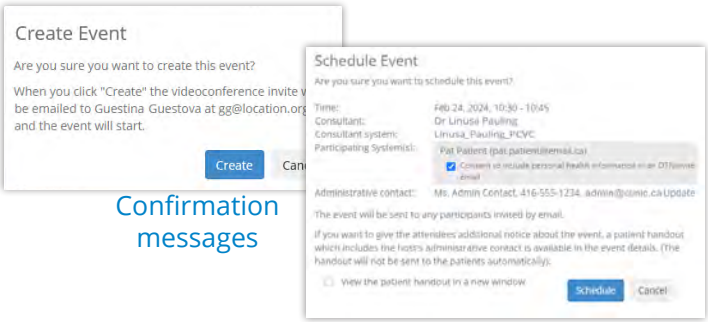
Events list invitation event



Event details



Copy event pop-up



Confirmation messages

Canceling an eVisit event

The event's creator or their delegate can cancel an eVisit.

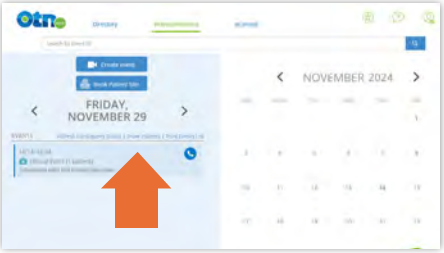
You can cancel a future-scheduled videoconference.
You cannot cancel a videoconference after you have connected to it, or completed it on the scheduled date.

> Always cancel an event **before** its scheduled start.
>
> Failing to cancel an event before its start time can lead to privacy incidents.
> For example, the event could launch while a consultation is taking place.

1. Using the **Calendar** panel, navigate to the date on which the videoconference is scheduled and locate its event listing.
2. To view the event details, click the Event List entry.

   The **Event Details** panel appears.
3. To cancel the invitation, click Cancel Event.

   A confirmation dialog box appears.
4. To confirm the cancellation, click Yes.
   - If the scheduled start date/time of the event is in the future, all invitees are sent an email notifying them
     that the videoconference is cancelled. (If you cancel an event from the past, no email is sent.)
   - A success message appears.
   - The event receives a 'cancelled' status in both Ncompass and in the Event List and Event Details.
   - You can no longer edit or re-send the invitation.
   - For non-clinical events, if you have set up an Admin Contact they are sent a copy of the email. (This does not happen for clinical events.)
   - If your are associated with a system (that is, a delegate) cancelling on behalf of the host, you will not receive a copy of the email.



Event list with invitation event

Event details before cancellation

Cancellation confirmation message