This guide contains instructions to help you understand the basics of inviting a participant, who is not a registered OTNhub user, to join a clinical, learning or meeting videoconference.

This involves creating and sharing:

- A link to the videoconference.
- An optional Personal Identification Number (PIN)
- Contact information for use by the invitee if they have questions or need help.

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For further assistance and technical support, contact OTN Technical Support
Phone: 1-855-654-0888   Email: techsupport@otn.ca
Understanding OTNinvite

OTNinvite brings another level of convenience and choice to meet via video in non-traditional settings, easily and simply, making care and collaboration more accessible than ever.

With OTNinvite, you can send an eVisit invitation* to anyone in Ontario—both in and out of healthcare settings—privately and securely.

Your invitation email includes the date and time of the videoconference and a link.

You can also give your invitees a unique PIN to use when joining your videoconference. The PIN provides additional security, as only those with the PIN can join.

- Due to privacy regulations, when you invite someone to join a videoconference, the PIN is not included in the invitation email. You can give the PIN to your invitee during your initial consultation or over the phone. (If the latter, give them the PIN after you have validated their identity.)
- The PIN must be a 6 digit number.

OTN strongly recommends that when you communicate with patients via email, ensure they are informed of the risks and ask them to sign a consent form. (As per the Canadian Medical Protective Association (CMPA) guidelines.)

If a participant does not have the VidyoWeb plug-in installed on their computer, they will be prompted to download it the first time they try to join a videoconference.

Invited users have the following limitations:

- They can only join conferences; they cannot start them.
- They can neither make direct calls nor can they receive them.

Participant Requirements

A participant must have either of the following minimum requirements in order to participate:

- Personal computer with:
  - High definition camera
  - Headset
  - Speakerphone with echo cancelling microphone
  - High-speed internet connection
- Mobile device with:
  - Wi-Fi or 4G-LTE wireless connection

For full details about technical requirements, refer to the Technical Readiness and Recommended Peripherals guides available from eVisit (Videoconference) Help.

*If you are a delegate for another user you can schedule an OTNinvite event on their behalf.
Privacy and Security Best Practices

OTN recommends that you follow these privacy and security guidelines when you invite a non-registered user to an eVisit (Videoconference). These guidelines will assist you in ensuring a safe and secure event.

For a more information, refer to Privacy and Security Recommendations and other documents available at eVisit (Videoconference) Help and the OTN Training Centre.

OTNinvite Best Practices

- When inviting someone to a clinical event, set a PIN to increase security.
- Never include PIN information in an email notification for clinical events. (This ensures that an intercepted email will not include enough information for a third party to join a PIN-protected event.)
- When you create an invitation, confirm the name and email address of your invitee before clicking “Send”.
- At the beginning of every videoconference, take attendance and do a roll call to identify all participants.

Email considerations

- Ensure that you and the people you invite to your videoconference are fully aware of the risks when using email communications. This includes, but is not limited to the following:
  - The privacy and security of email communication cannot be guaranteed.
  - Emails can introduce viruses into a computer system, and potentially damage or disrupt the computer.
  - Email can be forwarded, intercepted, circulated, stored or even changed without the knowledge or permission of the physician or the patient. Email senders can easily mistakenly address an email, resulting in it being sent to many unintended and unknown recipients.
  - Email is indelible. Even after the sender and recipient have deleted their copies of the email, back-up copies may exist on a computer or in cyberspace.
  - Use of email to discuss sensitive information can increase the risk of such information being disclosed to Third Parties.
  - Email can be used as evidence in court.
  - There is no guarantee that email messages sent, would be received by the intended recipient. Emails may get caught in spam filters.

Privacy and Security Incidents

- Report any privacy or information-security related incidents to your Privacy or Information Security officer, respectively (e.g., theft of an iOS mobile device that has the OTNconnect app).
- Any breaches with the potential to affect other organizations should also be reported to OTN by calling 1-855-654-0888 (option 2) or emailing techsupport@otn.ca.
- If you inadvertently connect with the wrong site and/or system please email the OTN Privacy Team at privacy@otn.ca and your local privacy office/person acting in that capacity to inform them of the privacy breach.

General Privacy and Security Practices

- Be aware of your surroundings. Never use personal and/or portable videoconferencing technology in a public or unsecured environment (e.g., airport, internet café or open area).
- Be mindful of the prevalence of malware and malicious apps. Ensure your device is secure with anti-virus, firewall, and an auto-lock screen saver.
- Do not share your username and password with anyone and Inform your invitee that they should not share their invitation email, event link URL or PIN with anyone.
- Do not leave your computer logged-in if you expect to be away from your desk for a long period of time. Lock your computer by pressing <Ctrl>+<Alt>+<Del> keys together and then selecting “Lock”.
- Review/update/familiarize your internal processes (where necessary & appropriate) to support Ontario privacy legislation: Personal Health Information Protection Act, 2004 (PHIPA), Freedom of Information and Protection of Privacy Act (FIPPA), and Municipal Freedom of Information and Protection of Privacy Act (MFIPPA).
Setting or Updating Admin Contact Information

Before you can start using OTNinvite, OTN recommends that you first set up your Administrative Contact.

The administrative contact information identifies who videoconference participants should contact if they have questions about the event.

You can put your own contact information here or identify the person who manages your videoconferencing schedule.

It is the only contact information that appears in email invitations for learning or meeting* events.

For all learning and meeting events (if an Admin Contact is provided):

- The Administrative Contact is sent a copy of all invitations.
- If the Administrative Contact changes per event, please remember to change the information in Self Serve.

1. If you are not already logged in to the OTNhub, open a browser window, sign in at otnhub.ca, and click the Profile icon (🔗) in the top banner.
   The Profile/Self Service panel appears (Figure 1).

2. To access the OTNhub services screen, select the Services link.
   The Services screen appears (Figure 2).

3. To view the Videoconference service settings, locate the row titled Videoconference and click its associated Settings icon (⚙).
   The Videoconference Settings options appear underneath the Videoconference row (Figure 3).
   To hide the settings, click the Settings icon (⚙).

4. Go to the OTNinvite - Administrative Contact Information section and type the information in the appropriate fields (Name, Phone, and Email).

5. To save the settings, click the Submit button.
   If all is okay, the Settings screen reloads and a success message appears.
   If there is an error, an error message appears. Correct the error and try again.

6. If you change your mind and do not want to update the information, click the Cancel button.

* For clinical invitations, only the invitee receives an email. Neither the sender nor the Admin Contact receive an email. For clinical invitation events, you can find all the information you need on the Event Details page.
Creating and Sending an Invitation

If this is the first time an invitee will use eVisit (Videoconference) on their computer, they will be prompted to install the plugin when they attempt to join the videoconference.

1. If you are not already logged in to the OTNhub, open a browser window, sign in at otnhub.ca, and click the Actions & Favourites icon (⭐) in the top banner.

2. To use the invitation feature, in the Actions section of the panel, click (Figure 4). A Call Settings panel appears with a default setting of OTN Member.

3. To access invitation settings, click the Connect to selector (👇) or click Guest Via OTNinvite beside the toggle switch.

The fields displayed within the form depend on which Call Purpose you select: clinical, learning, or meeting (Figure 5 or Figure 6).

4. Fill in the fields as described below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest name</td>
<td>Type the name and email address of the person you want to invite in the appropriate fields. If you want to invite more than one participant click Add guest for each additional person and provide their name and email address.</td>
</tr>
<tr>
<td>Guest email</td>
<td>OTNinvite limits the number of participants in an event, which includes the host, guests, and delegate.</td>
</tr>
<tr>
<td></td>
<td>• Clinical events have a maximum of eight.</td>
</tr>
<tr>
<td></td>
<td>• Non-clinical events have a maximum of twenty.</td>
</tr>
<tr>
<td></td>
<td>The invitee name appears in the OTNhub Event Details (but not in the email invitation). An email invitation will be sent to the addresses you provide. The email includes the scheduled date and time and a link to the videoconference.</td>
</tr>
<tr>
<td>Schedule...on behalf of</td>
<td>This field appears only if you are a delegate for another user (that is, you are associated with another OTNhub Videoconference system).</td>
</tr>
<tr>
<td></td>
<td>To view a list of available names, click in the field.</td>
</tr>
<tr>
<td></td>
<td>When you select a name other than your own, The Call button becomes inactive. You can only schedule an event for another user. (You cannot call on their behalf.)</td>
</tr>
</tbody>
</table>

See also, the quick reference guide OTNinvite by Delegate.

Continued on next page...
Add PIN

To increase security, you can add a Personal Identification Number that a participant must use to join the videoconference.

- If you want the system to automatically create a unique PIN for the session, leave the number that appears by default in the field.
- If you want to specify a PIN yourself, type a 6 digit number in the field.

For privacy and security reasons, the email invitation will not include the PIN. You must contact the invitee yourself and provide them with the PIN.

Call Purpose

**Clinical** events involve at least one health care provider and one or more patients who are discussed or participate in the call.

**Learning** events involve a speaker and an audience, such as conferences, workshops, interest group sessions, training programs, or lunch and learn sessions.

**Meeting** 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

Required for clinical events. Defaults to ‘1’.

Type the number of patients that will be seen (or discussed) during the call.

Patient Present?

Required for clinical events. Defaults to ‘present’.

If no patient will be present during the call, select ‘not present’.

‘I am’ or ‘a third party is’ the Consulting HCP

Required for clinical events. Defaults to ‘I am’.

Identify your role in the videoconference by selecting whether you, or a third party is the consulting health care professional.

Date* and Time

**Start now**: Select this option if you want the videoconference to start as soon as you click the Send Invite button. When selected, the Date and Start Time fields become read-only and display the current date and time.

By default, the End Time is 30 minutes after the Start Time. If your event will have a different duration, select a time or type an End Time using 24 hour format (e.g., type 14:00 for 2:00 p.m.).

**Schedule & Send Invite**: Select this option if you want the videoconference to occur at a future date or time.

To select a date, click in the Date field and use the Calendar pop-up or type a date using the format YYYY-MM-DD.

Select the desired Start and End Times or type the time using 24 hour format (e.g., type 14:00 for 2:00 p.m.).
5. To initiate the invitation request, click either **Schedule & Send Invite** or **Send Invite & Start Now**.

A **Confirmation** dialog box appears (Create Event or Schedule Event), which contains the invitation details (Figure 8).

6. Review the name, email address, and other information to ensure that everything is correct.

7. To send the invitation, click **Create** or **Schedule**.

**If you selected an immediate start time**

*(Send Invite & Start Now)*:

**Invitee:**
- Is sent an email which includes the scheduled date and time and a link to the videoconference.
  - If you specified a PIN, you need to give this to them 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 videoconference. Instructions are available in the **Joining a Videoconference via an Email Invitation** guides (for **PC** or **Mac**) available from eVisit (Videoconference) Help.

**Videoconference Host** (usually you, the person creating the invite):
- When connected, a video window appears. If you are the first participant to enter the conference, you will see only yourself.
- The videoconference 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 & Send Invite)*:

The system checks your eVisit (Videoconference) 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:

**Invitee:**
- Is sent an email which includes the scheduled date and time and a link to the videoconference.
  - If you specified a PIN, you need to give this to them yourself.
  - If the event includes multiple participants, each person is sent the email invitation via “blind cc”.

**Videoconference Host** (usually you, the person creating the invite):
- The eVisit (Videoconference) calendar displays the scheduled date.
- The videoconference is added to your **Events List**.
- 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 are a delegate scheduling on behalf of another user, you can only schedule an event. The Call button is inactive.
Viewing Event Details

The Event Details page is where you can review the details and access more information about the event. After you send an email invitation, the event appears in your* Events List.

You can perform various actions on an event depending on the date and the event’s status. For more information, see Event Actions below.

To view the event details:
1. Using the Calendar panel, navigate to the event’s scheduled date and locate the event in the Events List.
2. To view the event details, click its Events List entry.

Event Actions

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call</td>
<td>Appears only on the date when the event is scheduled to start.</td>
</tr>
<tr>
<td></td>
<td>See <a href="#">Hosting your Videoconference on page 11</a>.</td>
</tr>
<tr>
<td>Re-send Invite</td>
<td>Appears up until 11:59 p.m. of the event’s scheduled date.</td>
</tr>
<tr>
<td></td>
<td>See <a href="#">Re-sending an Invitation on page 14</a>.</td>
</tr>
<tr>
<td>Cancel Event</td>
<td>Appears up until:</td>
</tr>
<tr>
<td></td>
<td>• The start time of the event, or</td>
</tr>
<tr>
<td></td>
<td>• When you click the event’s Call button.</td>
</tr>
<tr>
<td></td>
<td>When you cancel an event, an email is sent to your invitee notifying them of the cancellation.</td>
</tr>
<tr>
<td></td>
<td>See <a href="#">Cancelling an Invitation Event on page 15</a>.</td>
</tr>
<tr>
<td>Change End Time</td>
<td>Appears up until 11:59 p.m. of the event’s scheduled date.</td>
</tr>
<tr>
<td></td>
<td>See <a href="#">Updating an Invitation Event on page 13</a>.</td>
</tr>
<tr>
<td>Change Number of Patients</td>
<td>For clinical events, appears up until 11:59 p.m. of the event’s scheduled date.</td>
</tr>
<tr>
<td></td>
<td>See <a href="#">Updating an Invitation Event on page 13</a>.</td>
</tr>
</tbody>
</table>

* Unless you are creating the invite on behalf of a delegator. In which case, it will appear in the delegator’s Events List.
### Field Descriptions

<table>
<thead>
<tr>
<th>Field (in order of appearance)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Field Information</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Category</strong></td>
<td></td>
</tr>
<tr>
<td>Learning events involve a speaker and an audience, such as conferences, workshops, interest group sessions, training programs, or lunch and learn sessions.</td>
<td></td>
</tr>
<tr>
<td>Meeting events involve organizational, operational, or management content such as committees, working groups, project status reports, or interviews.</td>
<td></td>
</tr>
<tr>
<td>Clinical events involve a consultant and either another health care professional (where one or more patients will be discussed) or a patient or patient’s family.</td>
<td></td>
</tr>
<tr>
<td><strong>Time</strong></td>
<td></td>
</tr>
<tr>
<td>The event’s scheduled start and end times, in 24 hour format (HH:MM).</td>
<td></td>
</tr>
<tr>
<td>You can change the End Time of an event, up until 11:59 p.m. on its scheduled date.</td>
<td></td>
</tr>
<tr>
<td>To change the End Time:</td>
<td></td>
</tr>
<tr>
<td>1. Click beside the times, select a new time, and submit.</td>
<td></td>
</tr>
<tr>
<td>2. Re-send the invitation to notify your invitee about the changed time.</td>
<td></td>
</tr>
<tr>
<td><strong>Event Title</strong></td>
<td></td>
</tr>
<tr>
<td>The title given to the event by the person who created and sent the invitation.</td>
<td></td>
</tr>
<tr>
<td>If no title was provided, the default ‘Clinical Event’, ‘Learning Event’, or ‘Meeting Event’ appears.</td>
<td></td>
</tr>
<tr>
<td>On the day the event is scheduled to start a Call button appears beside the title, and you can connect to and join the videoconference.</td>
<td></td>
</tr>
<tr>
<td>Field (in order of appearance)</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>OTNinvite Details</strong></td>
<td></td>
</tr>
<tr>
<td>URL</td>
<td>The link address for the virtual ‘room’ created by eVisit (Videoconference) (where the videoconference will take place). This is a unique URL for each videoconference. It is an active link that you can use to test your videoconference setup, up to and including the day of the event. Your invitee receives the same link in their invitation.</td>
</tr>
<tr>
<td>Host System</td>
<td>The system name of the eVisit (Videoconference) user who created and sent the invitation and who will be hosting the videoconference.</td>
</tr>
<tr>
<td>Guests</td>
<td>The name and email address belonging to each of the people invited to the videoconference and to whom the invitation email was sent.</td>
</tr>
<tr>
<td>Total participants</td>
<td>The total number of participants scheduled for the videoconference. This includes the host, invited guests, and the host’s delegate.</td>
</tr>
<tr>
<td>PIN</td>
<td>Only appears if a PIN has been set for the event. When a PIN is set, the invitee will have to enter it before they can join the videoconference. The PIN is not included in the invitation email and the person sending the invitation must give the PIN to the invitee in a separate communication.</td>
</tr>
<tr>
<td><strong>Event Details</strong></td>
<td></td>
</tr>
<tr>
<td>Event ID</td>
<td>A unique number assigned to every videoconference. If you need to contact the event’s organizer or OTN Customer Care, quote this number to identify the event. If you are a registered Ncompass user and the ‘host system’ of the event, the Event ID is an active link to open the Ncompass Event Details.</td>
</tr>
<tr>
<td>Number of Patients</td>
<td>The number of patients that will be seen or discussed during the videoconference. You can change the Number of patients for an event at any time. To change the Number of patients, click beside the number, type a new number, and submit.</td>
</tr>
<tr>
<td>Scheduled by</td>
<td>Only appears if the event was scheduled by a delegate on behalf of another person. Displays the name of the delegate who scheduled the event.</td>
</tr>
</tbody>
</table>
Hosting your Videoconference

At the scheduled date and time of your videoconference, log in, connect, and wait for your invited participants to join. After all participants have joined the videoconference and you have taken attendance, be sure to ‘lock’ the videoconference. This helps prevent privacy breaches. When you lock your videoconference, no one else can join.

Connecting in an unscheduled event (on-demand or ad-hoc)
To start a videoconference that begins immediately, when you create the invitation click the (Send Invite & Start Now) button (Figure 15). Skip to step #4 below.

Connecting in a scheduled event
If you have previously scheduled the videoconference, on the scheduled date a Call ( ) button appears in the Events List and in the Event Details.

   Note: You will not receive an automatic notification about a scheduled event. You must log in to the OTNhub and manually connect.

   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. To start the call, click (Call) either in its Events List entry (Figure 16) or in the details panel (Figure 17).

   4. When you click (Call) or (Send Invite & Start Now), a video window appears.
      • If you are the first participant to connect, you will see yourself in two video images - a ‘Self View’ image and the other labeled with your eVisit (Videoconference) system name.
      • When an invitee clicks on the link in their email invitation, they will be connected and will replace your system name image.
Securing (locking) your videoconference

When you first join your videoconference, it is unlocked.

For one-on-one calls, you do not need to lock the videoconference and you can skip to the next section (Controlling your videoconference).

For multi-point calls, after all participants have joined the meeting, take a role call and then lock the videoconference. This helps prevent privacy incidents.

As your invited participants join the videoconference, the name that they entered when joining appears in the Participants panel.

1. To view the participants panel, click the More button ( ) and then click the Participants button ( ) in the video control bar.
   The Participants panel appears on the left side of the video window. The participant list is sorted based on when a participant joined the videoconference (last to join, last in the list).

2. Monitor the participants list and, after everyone has joined, perform a roll call.

3. After you have confirmed who is in the call, to lock the videoconference, click the blue Lock ( ) button in the Participants panel.
   While the videoconference is locked, the Lock button appears red ( ).

If a participant needs to reconnect or join late, you must unlock the videoconference to allow them to join the event.

To unlock the videoconference, click the red Lock ( ) button in the Participants panel.
While the videoconference is locked, the Lock button appears blue ( ).

Controlling your videoconference

1. While in a videoconference, to control the audio/visual streams, see a participant list, or share your screen, use the controls in the video window toolbar. (Refer to the user guide, Using the Video Window.)

2. If one of the participants is a room-based system, you can manipulate their camera movement using the Far End Camera Controls ( ) in the Participants panel.

3. To disconnect, click the End Call icon ( ) in the video window toolbar.
6 Updating an Invitation Event

You can update a couple of fields within an invitation event up until the end of the day (23:59) on which the event is scheduled to occur.

For clinical, learning, and meeting events, you can change the scheduled end time. For example, if you mistakenly blocked off too much time when creating the original invitation.

For clinical events you can update the number of patients. For example, if you originally planned to discuss two patients, but ended up discussing an additional case. (The accuracy of this number is important because it is used for reporting purposes, both for OTN and the Ministry of Health and Long Term Care.)

Participants you have invited to the videoconference are not automatically informed about these updates. If you want to notify participants about the update, you can re-send the invitation.

If you need to change the email address or other information in the email, you must first cancel the original event and then create and send a new invitation.

1. If you are not already logged in to the OTNhub, open a browser window, sign in at otnhub.ca and access the Videoconference service.

2. Using the Calendar panel, navigate to the date on which the videoconference is scheduled and locate its event listing (Figure 21).

3. To view the event details, click the event listing.
   The Event Details panel appears (Figure 22).

4. To edit the End Time or Number of Patients, click beside the field.
   The displayed value(s) are replaced with text field(s) and Submit and Cancel buttons.

5. Select or type the new value and click Submit.
   The Event Details refreshes and appears with the new information.
Re-sending an Invitation

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

The re-sent invitation email contains exactly the same information as the original invitation. If you need to change an email address or other information in the email, you must first cancel the original event and then create and send a new invitation.

1. If you are not already logged in to the OTNhub, open a browser window, sign in at otnhub.ca and access the Videoconference service.

2. Using the Calendar panel, navigate to the date on which the videoconference is scheduled and locate its entry in the Events List (Figure 21).

3. To view the event details, click its Events List entry. The Event Details panel appears (Figure 22).

4. To re-send the invitation, click Re-send. A confirmation dialog box appears.

5. Review the names and email addresses to ensure that they are correct.

6. To confirm the re-sending, click Re-send.
   - All invitees are sent an email notifying them of the videoconference, which includes the scheduled date and time and a link to the videoconference.
   - 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.)
   - A success message appears.
Cancelling an Invitation Event

You can cancel a future-scheduled videoconference that you previously created via an invitation. You cannot cancel a videoconference after you have connected to it or completed it on the scheduled date.

1. If you are not already logged in to the OTNhub, open a browser window, sign in at otnhub.ca and access the Videoconference service.

2. Using the Calendar panel, navigate to the date on which the videoconference is scheduled and locate its event listing (Figure 24).

3. To view the event details, click the Event List entry. The Event Details panel appears (Figure 25).

4. To cancel the invitation, click CancelEvent. A confirmation dialog box appears.

5. 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.)