How to Schedule and Join a Video Visit

This document outlines the options for joining and scheduling using a personal computer, smart phone, or tablet and connecting with the assistance of a delegate.

Notes regarding patient consent to **Personal Health Information (PHI) in email**:

When patient consent is provided, the following PHI is included in the OTNinvite email:
- Patient's first and last names
- Consultant/Host's name
- Administrative contact phone (if one has been set in the host's Administrative Contact settings)

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1. Log in at otnhub.ca, go the **Videoconference** tab, and schedule an appointment using the **Create Event** feature
   (Click the "Create Event" button at the top of the Events List)

2. Select the **Event Type** (clinical, learning, or meeting),
   click in the **Participating Systems** field, and select a
   system type of **Guest via email (OTNinvite)**.

3. Add the patient's name or initials and email,
   indicate if the patient has provided consent to PHI in their email invitation,
   confirm the consent selection, and click Add.

4. Create a **Host PIN**. Click the Schedule button and set a date and time.
   Confirm that the appointment details are accurate.
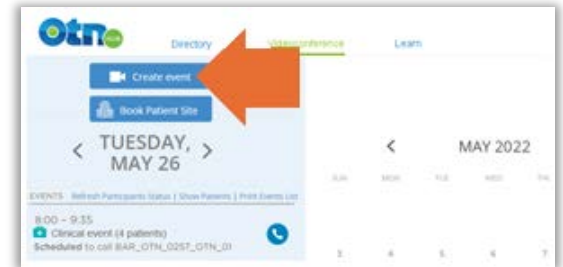
Joining a Videoconference

1. On the day of the appointment, log in at otnhub.ca, go the **Videoconference** tab and
   locate the appointment in the Events List.

2. To start the videoconference, click the **Call** button 📞.

Schedule a Videoconference using an iPad or Tablet

You **cannot schedule** a videoconference appointment using a smart phone.

You can schedule a videoconference appointment with a tablet or iPad, but there will be warning messages and less than ideal screen layouts.

1. Log in at otnhub.ca, go the **Videoconference** tab, and schedule an appointment using the **Create event** feature. (Click the "Create Event" button at the top of the Events List.)

2. Select the **Event Type** (clinical, learning, or meeting), click in the **Participating Systems** field, and select a system type of of **Guest via email (OTNinvite)**.

3. Add the patient's name or initials and email, indicate if the patient has provided consent to PHI in their email invitation, confirm the consent selection, and click Add .

4. Create a **Host PIN**. Click the [7 Schedule] button and set a date and time. Confirm that the appointment details are accurate.

   When the appointment is scheduled, the Event Details includes a "Host Link" (the event link needed to join) and the "Host PIN".

5. Copy/paste the Host Link and Host PIN from the Event Details into an email for yourself or into your calendar.

Connect with Your Patients using a Smart Phone or Tablet

Joining a Videoconference – Option 1– Smart Phone or Tablet

You **can join** a videoconference using either a smart phone or a tablet.

Everyone involved in the videoconference must have the **Pexip Infinity Connect** app installed
on their smart phone or tablet. ([iOS app](); [Android app]())

1. Open the email (or calendar entry) containing the Host Link and Host PIN and tap the **Host Link**.

2. Tap the **Open my eVisit event** button in the Welcome screen and allow access to your camera and microphone.

3. Enter your name in the "*You're invited to*" screen and then tap the **Video** option.

4. Enter the Host PIN.

Joining a Videoconference – Option 2 – Tablet Only

Everyone involved in the videoconference must have the **Pexip Infinity Connect** app installed
on their smart phone or tablet. ([iOS app](); [Android app]())

1. Open a browser, log in at [otnhub.ca](), go the **Videoconference** tab, and locate the event.

2. In the Event Details, tap the **Host Link**.

3. Enter your name in the "*You're invited to*" screen and then tap the **Video** option.

4. Enter the Host PIN.

Connect with Your Patients using a Smart Phone or Tablet with Help from an Administrative Support Person (Delegate)

Option 1 – Clinician Joins using "Event Link" Provided by Delegate

The clinician is the "delegator" and will be the "host" for the videoconference.
The clinician's administrative support is a "delegate" (*i.e.*, they are scheduling the delegator's system).

Delegate Schedules a Videoconference Appointment using OTNhub

As a delegate (*i.e.*, when scheduling for another system), follow these steps.

1. Log in at otnhub.ca using a personal computer, go to the **Videoconference** tab,
   and schedule an appointment using the **Create event** feature.
   (Click the "Create Event" button at the top of the Events List.)

2. Select the **Event Type** (clinical, learning, or meeting), click in the **Participating Systems** field,
   and select a system type of of **Guest via email (OTNinvite)**.

3. Add the patient's name or initials and email, indicate if the patient has provided consent to
   PHI in their email invitation, confirm the consent selection, and click Add.

4. Add the delegator's system.

5. Create a **Host PIN**. Click the ☐ Schedule button and set a date and time.
   Confirm that the appointment details are accurate.

   When the appointment is scheduled, the Event Details will include a "Host Link" (the link
   needed to join) and a "Host PIN".

6. Delegate copy/pastes the Host Link and Host PIN from the Event Details into an email
   and sends it to their delegator or enters the information into their delegator's calendar.

Clinician Joins the Videoconference Appointment using a Smart Phone or Tablet

Everyone involved in the videoconference must have the **Pexip Infinity Connect** app installed
on their smart phone or tablet. (iOS app; Android app)

1. Open the email (or calendar entry) containing the Host Link and Host PIN
   and tap the **Host Link** (event link).

2. Tap the Open my eVisit event button in the Welcome screen and allow access to your
   camera and microphone.

3. Enter your name in the "*You're invited to*" screen and then tap the **Video** 🎥 option.

4. Enter the Host PIN.

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Option 2 – Clinician Joins using the "Guest Email" Invitation

The clinician is the "delegator" and will be the "host" for the videoconference.
The clinician's administrative support is a "delegate" (*i.e.*, they are scheduling the delegator's system).

Delegate Schedules a Videoconference Appointment using OTNhub

As a delegate (*i.e.*, when scheduling for another system), follow these steps.

1. Log in at otnhub.ca using a personal computer, go to the **Videoconference** tab,
   and schedule an appointment using the **Create event** feature
   and the *Participant System* type of **Guest via email (OTNinvite)**.

2. Add the delegator's name and email as a guest.

3. Add the patient's name or initials and email, indicate if the patient has provided consent to
   PHI in their email invitation, confirm the consent selection, and click Add.

4. Create a Host PIN.

5. Click the 🗓 Schedule button and set a date and time.
   Confirm that the appointment details are accurate.

   When the appointment is scheduled, the **Event Details** will include a "Host Link" (the link
   needed to join) and a "Host PIN".

6. Delegate sends an email to the delegator with the **Host PIN** from the Event Details or enters the
   information into their delegator's calendar.

Clinician Joins the Videoconference Appointment using a Smart Phone or Tablet

Everyone involved in the videoconference must have the **Pexip Infinity Connect** app installed
on their smart phone or tablet. (iOS app; Android app)

1. Open the guest email and tap the **Start eVisit** button.

2. Have on hand the **Host PIN** given to you by your delegate.

3. Tap the Open my eVisit event button in the Welcome screen and allow access to your camera
   and microphone.

4. Enter your name in the "*You're invited to*" screen and then tap the **Video** 📹 option.

5. Enter the **Host PIN**.