eVisit Scheduling by Delegate

A delegate is someone who schedules for (is associated with) one or more systems in addition to their own system. That system could be a personal system (PCVC) or a room-based system.

For example:

- A specialist can give their nurse permission to schedule their personal system for video visits with patients. The nurse is a delegate for the specialist's system.

- Or a Telemedicine Coordinator (TMC) can be set up to schedule a clinic's room-based system. The TMC is a delegate for the room-based system.

If you are a delegate for another OTNhub user or system, you can schedule an eVisit on their behalf.

Contact your organization's OTN Primary Contact* to become a delegate for a user within your organization.

A delegate can join the eVisit on its scheduled date.

Events have a maximum of 60 participants, which includes the host/consultant, the invited participants, and the delegate.

For more information about OTNinvites, see Scheduling eVisits (OTNinvite) 📄.

For instructions about scheduling with a Patient Access Network** (PAN) site, see Viewing and Scheduling PAN Sites 📄.

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**.
(Or use the "*Search by Event ID*" field in the top navigation bar.)

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 eVisit Host URL).
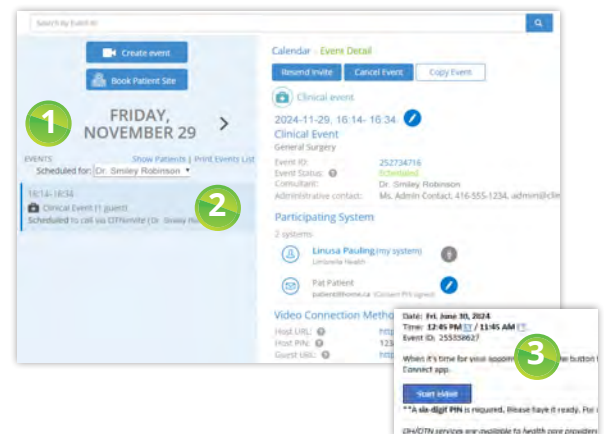
eVisit event in delegate's calendar

16:00–16:23
Clinical Event (1 patient)
Scheduled between Dr Pauling and Pat Patient via email

eVisit event in delegator's calendar

16:00–16:23
Clinical Event (1 patient)
Scheduled with Pat Patient via email

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* See Identifying Your Organization's Primary Contact for Service 📄 for instructions about finding your Primary Contact.

** PAN sites are designated physical locations for any patient in Ontario to attend a virtual visit in their own community. This enables equitable access to care when there are patients not able to access technology.

*** 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:

- If you are on the OTNhub home page:
  - To invite a *non-OTN member* (e.g., a patient), type their name and email 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`.
  - To access the Videoconference service, click **Videoconference** in the top navigation bar.

- 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** pop-up appears.

2. Fill in the required fields. (See eVisit Fields on page 3.)

- For each participating system, select the type of system (Guest via email (OTNinvite), OTN Member or System, or Non-OTN system) and fill in the required fields.
- Add your delegator's system as a participant*. (If you will also attend, add your system to the list.)
- Identify the Consultant/Host system 🔑 and if needed, provide the Consultant/Host name**.
- Leave the auto-generated **Host PIN** or set your own custom Host PIN.
- If desired, set the optional **Guest PIN**.
- 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**.

3. Click `Schedule`. A Schedule pop-up appears.

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

5. Review the confirmation details.

  i. If you are scheduling a clinical event and you want to view a 'patient handout' summarizing the event details, select the "*View the patient handout*" check box.

  ii. If you need to add or update **Administrative Contact** information, click the "**update**" link and follow the on-screen prompts.

  iii. If all is correct, click **Schedule**.

  - An email invitation is sent if the eVisit includes a guest via email or a non-OTN system.
  - If there is at least one OTN system, the eVisit will appear in your (the delegate's) calendar and anyone associated with the OTN system will be able to view the event in their OTNhub calendar.
  - If there is no OTN system, the event will appear only in your (the delegate's) OTNhub calendar.

Different ways to access the eVisit feature

* If you are a **delegate for only one other system,** that system appears in the Participating Systems list (your own system does not appear). If you are a **delegate for multiple systems**, the Participating Systems list is empty, and you must add your delegator's system.

** Consultant field does not appear if an OTNhub PCVC user is selected as the host/consultant.

eVisit Fields

Field	Description
Event Type	**Clinical** events involve at least one health care provider and one or more patients who will be discussed or will participate in the call. **Learning** events involve a speaker and an audience, such as conferences, interest group sessions, workshops, 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.
Participating System(s)*	Click in the **Participating Systems** field and select a system type. **To invite a guest via email (OTNinvite)**, type the name and email address of the person you want to invite in the appropriate fields, indicate if the patient consents to PHI in the email invitation, confirm the consent choice, and click `Add`. • If you started from **Connect to a Patient at Home**, the name and email are added as a participant with the data you provided. You can indicate if the patient consents to PHI in the email invitation using the confirmation pop-up when you schedule the event. **To invite an OTN member/system**, type a few characters of the person's first or last names or their organization's name (or if it's a room-based system, a few characters of the system's name, its site name, or the organization's name) and select from the drop-down list of search results. **To invite a non-OTN system**, type the name and email address of the person who is responsible for the system and click `Add`. Repeat for all desired participants. eVisit events have a maximum of 60 participants, which includes the host, guests, and delegate. For events that involve an email invitation: • The invitee name appears in the OTNhub Event Details but is included in the email invitation only if patient consent is provided. • 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.
Consultant (clinical events) or Speaker or Chair (learning or meeting events)	Also known as the 'host'. When scheduling for another system (personal or room-based), no participant is marked as host and you must identify the host. The **host system** is identified with a Host icon 🔵 beside their name in the participating systems list. To identify/change the host system, click the Participant icon 👤 beside the desired name in the participating systems list. If the host is not an OTN personal user, you need to also provide a Consultant name. To provide the Consultant name, type a few characters of the name in the **Consultant/Speaker/Chair** field and select a name** from the drop-down list.

Continued next page…

* When the Connect panel opens…
- If you are a delegate for **only one other system**, that system appears in the Participating Systems list (your own system does not appear).
- If you are a delegate 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).
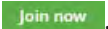
** Names are listed alphabetically by last name. If you cannot find the desired name, contact info@otn.ca to register your consultant/speaker/chair.

Field	Description
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.) • 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. • If you want to set a host PIN yourself, type a 6 digit number in the field.
Add Guest PIN	To increase security, you can add a "guest"' PIN that a participant must use to join the event. • 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. • If you want to set a guest PIN yourself, type a 6 digit number in the field. 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.
Opt out of PCVC time conflicts	If you do not want OTNhub to check for scheduling conflicts, select **Opt out of PCVC time conflicts**. For example, if you want to book 10-minute one-on-one clinical back-to-back appointments that overlap, which allows the consultant to join each event when they need to (similar to Outlook calendar event scheduling). This applies only to PCVC systems. Conflict checking remains in place for legacy / room-based systems.
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 **Clinical** 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'.
[Schedule] Schedule & Send Invite	Click this button to open a **Schedule event with** dialog box. 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.)

Joining an eVisit as a Delegate/Guest from an Email Invitation

If you schedule for another person's system (you are a delegate), you can join a video visit the same way that other invited participants join.

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

1. Open your email invitation and click ⟨ **Start eVisit** ⟩.

    Your default browser opens.

Email invitation

2. 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.)
    *   In the **Self-view & Join now** panel, 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".

Event access panels

Display name

Self view

PIN field

3. To join the meeting, click ⟨ **Join now** ⟩.

4. If the event does not have a Guest PIN, an "*Are you a Host*" pop-up appears. Select "No" and skip to step #6.

    A "*What's the PIN for this meeting*" pop-up appears.

5. Enter the **Guest PIN** and click **Next** .

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

6. 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.

Video in session

7. To end the conference:
    i.   If the video control bar is not visible, move your mouse over the video image to show it.
    ii. Click ⟨ **Leave** ⟩.
    iii. Close the browser.

* 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.
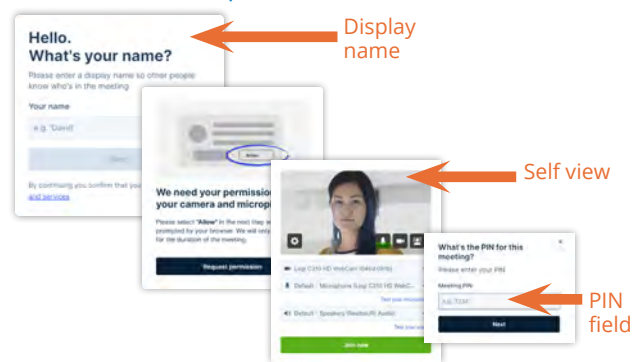
Joining an eVisit as the Host

Hosting via OTNhub using the Host URL on Windows (PC) or Mac

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**.**

(!) 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 videoconference is scheduled and locate it in the **Events List**. Or use the **Search by Event ID** field in the top navigation bar to find the event.

2. To view the videoconference'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.
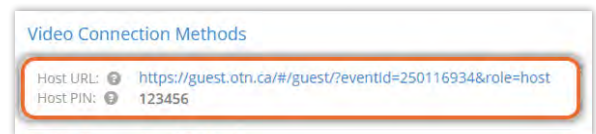
   "*What's the PIN for this meeting*" pop-up appears.

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 panels

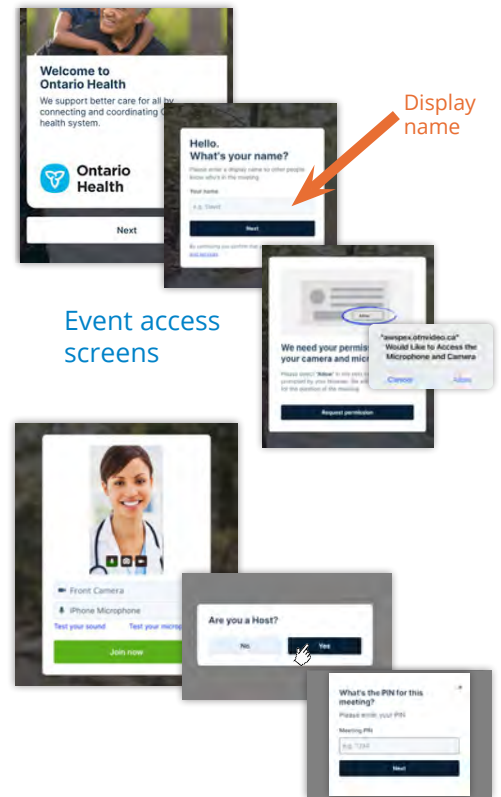Display name

Self view

PIN field

Video in session

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* 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.
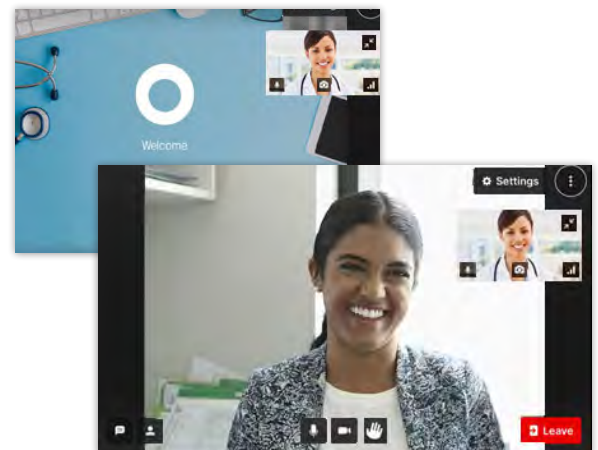
Hosting via a Mobile Device

Note: 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 .

Display name

Event access screens

Video in session

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* 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.