Scheduling OTNinvite Video Visits

You can schedule one-on-one or group eVisits with OTN members (PCVC users), OTN systems (room-based), guests via email, or non-OTN systems (standards-based).

If an event includes one or more participants who are not OTN members or who use a non-OTN system, an email invitation (OTNinvite) is sent to those participants. When scheduling an eVisit, you can generate a Personal Identification Number (PIN) for added security.

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1 Understanding eVisits and Email Invitations

You can schedule* an event or start a video call that includes OTN members (personal user or room-based), people who are not OTN members, or non-OTN systems (standards-based).

The non-OTN participants will receive an email invitation, known as an OTNinvite.

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

You can also give your invitees a unique 'guest' 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.

Ontario Health (OTN) strongly recommends that when you communicate with patients via email, ensure they are informed of the risks. In Ontario Health (OTN)'s role, we do not manage patient consent, and ask that health care providers follow the patient consent policies and practices as established at their organization.

Recommend to your participants that they use a Chrome browser for their eVisit. This browser provides better support for videoconferencing features.

Invited non-OTN participants can only *join* conferences; they cannot start them.

Participant Requirements

A participant can use a device with the following minimum requirements:

- Personal computer
  - Windows 10+ or MacOS 12+ (Montery)
  - High definition camera
  - Headset or Speaker-phone with echo cancelling microphone
  - High-speed internet connection
- Mobile device
  - Apple iOS 12.2+ or Android 7+
  - Wi-Fi or 4G-LTE wireless connection
- Non-OTN room-based system
  - Must meet standards-based requirements 📄

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

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*If you schedule for another user's system (a delegate), you can create an eVisit event on their behalf, but cannot start an ad-hoc call on their behalf.

Privacy and Security Best Practices

Ontario Health (OTN) recommends that you follow these privacy and security guidelines when you send an email invitation. These guidelines will assist you in ensuring a safe and secure event.

For a more information, refer to the [Ontario Health (OTN) Training Centre](#) ⧉. and [Privacy Centre](#) ⧉.

Clinical Appointments and Personal Health Information (PHI) in OTNinvite emails

- 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 number (if one has been set in the host's [Administrative Contact settings](#))

- Ensure your patients are aware that their email is recorded and retained by Ontario Health (OTN) **every time they receive an email** scheduling a video visit and that Ontario Health (OTN) may, in some instances, act as an Agent of the Member Organization or healthcare provider.

eVisit Invitation Best Practices

- When inviting someone to a clinical event, set a 'guest 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.
- Any breaches with the potential to affect other organizations should also be reported to Ontario Health (OTN) by calling 1-855-654-0888 or emailing techsupport@otn.ca.
- If you inadvertently connect with the wrong site and/or system please email the Ontario Health (OTN) Privacy Team at privacy@otn.ca and your local privacy office/person acting in that capacity to inform them of the privacy breach.

2 Setting or Updating Admin Contact Information

Before you start scheduling eVisits, we recommend that you first set up your Administrative Contact.

The administrative contact information identifies who videoconference participants can 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.

This **contact information*** appears in email invitations for **learning or meeting** events and clinical events if the patient has provided consent for PHI in their email invitations.

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.**

When provided, the Admin Contact information appears in the following places:

	Clinical Events	Learning & Meeting Events
Email Invitation*	If patient consent provided	✔
Patient Handout	✔	✔

Figure 1: User panel menu

1. If you are not already logged in to the OTNhub, open a browser window, sign in at otnhub.ca⌐, and click the **User Panel** icon ⦿ in the top banner.

   The **User/Self Service** panel appears.

2. To access the OTNhub services screen, select the **Service Settings** link.

   The **Videoconference Settings** screen appears.

3. Go to the **OTNinvite administrative contact information** section and type the information in the appropriate fields (**Name**, **Phone**, and **Email**).

4. To save the settings, click the **Save** 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.

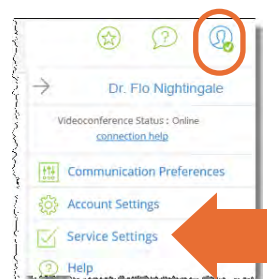5. If you change your mind and do not want to update the information, click the **Cancel** button.

Figure 2: Videoconference settings options

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* For clinical invitations, only the invitee receives an email. Neither the sender nor the Admin Contact receive an email.
For clinical events, you can find contact information in the Event Details or Patient Handout.
The OTNinvite can include PHI if the patient has provided consent.

3 Scheduling an Event or Calling Now

Accessing the Connect feature

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 address in the **Connect with a Patient at Home** panel, click **Go**.
  - To connect with an *OTN member* or *OTN 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** settings panel appears.

  After you identify the participants in the event, there are two ways to connect.
  - **Call Now** - The videoconference will start as soon as you click the Call Now button
  - **Schedule** - The videoconference will occur at a future date or time.

  If you are scheduling for yourself *and are not associated with another system (that is, you are not a delegate for another user), your personal (PCVC) system appears as the first participant and the consultant/host system.

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Figure 3: OTNhub landing page links
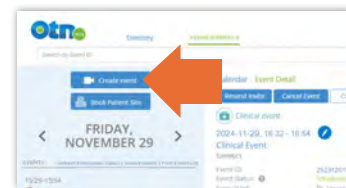
Figure 4: Create event in Events List
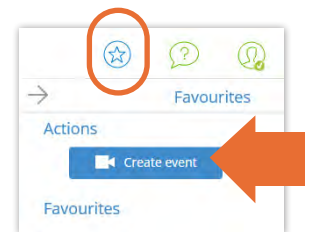
Figure 5: Actions & Favourites

Figure 6: Connect panel with clinical options

> **For training guides and videos**,
> click the link, "*For more info, click* here", at the bottom of the panel.
>
> **To see a checklist** that can help you decide if your invited guests are suitable for video visits, click the Patient Eligibility link at the bottom of the panel.
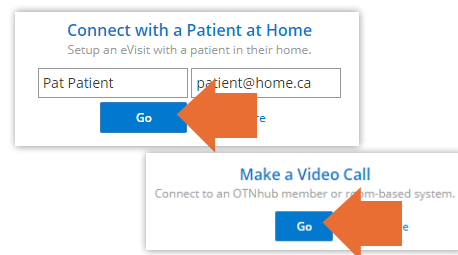
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* When the Connect panel opens...
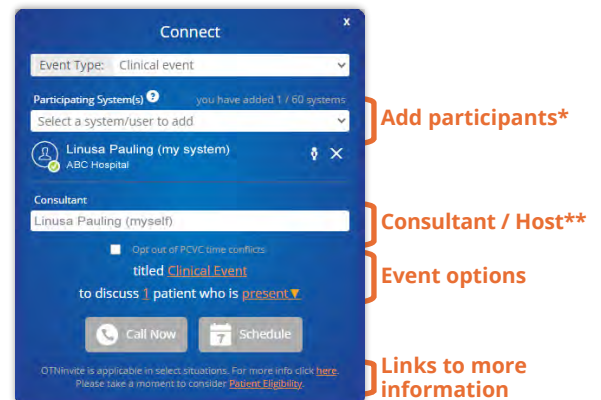- If you are not a delegate for another system, your system automatically appears in the Participating Systems list.
- If you are a delegate for only one other system, that system appears in the Participating Systems list (your own system does not appear).
- If you are a delegate for multiple systems, the Participating Systems list is empty, and you must add your delegator's system (and your own system if you will attend).

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

Setting up the Video Visit

1. To identify the event type, click the drop-down arrow and select one of the following types:

   - **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.

2. To identify participants, click the **Participating System(s)** drop-down field and select the type of participant (Guest via email (OTNinvite), OTN Member or System*, or Non-OTN system (standards-based).

   - If you are scheduling for yourself and are not associated with another system (that is, you are not a delegate for another user), your personal (PCVC) system appears as the first participant.
   - If you are scheduling (*i.e.*, 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).

Figure 7: Connect panel for users without delegator(s)

3. Fill in the fields as described below.

Field	Description
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 include PHI in an OTNinvite email* from the confirmation pop-up when you schedule the event.
	To invite an OTN member or 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 (See standards-based requirements .):
	• For the name of the person who is responsible for the system, type a few characters of the name and select from the drop-down list or type the name as free text.
	• Type the email address and click Add .
	Repeat for all desired participants.
	To remove a system from the Participating Systems list, click ✖ beside the system name**.
	eVisit events limit the number of participants that can attend, which includes the host, guests, and delegate. All events have a maximum of 60 participants.
	For events that involve an OTNinvite:
	• The invitee name appears in the OTNhub Event Details but it only appears in the email invitation if patient "*consent for PHI in email*" is selected.
	• 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.

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Figure 8: Connect panel for users with multiple delegators

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* To add an OTN room-based system, you must have scheduling permissions for at least one of the systems in the event.

** If you remove your own system from the Participating Systems list, you can only "Schedule" the event. (That is, you cannot "Call Now".)
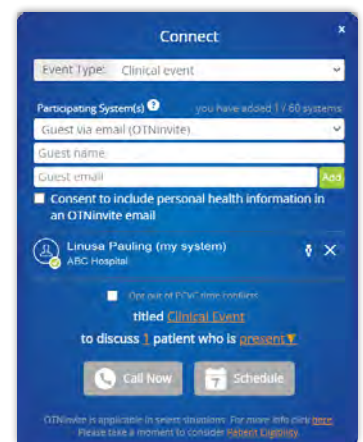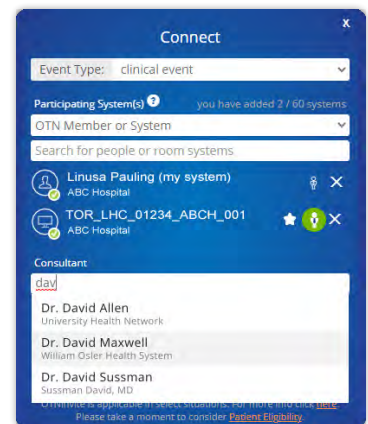
Field	Description
Consultant (clinical events) or Speaker or Chair (learning or meeting events)	Also known as the 'host'. The **host system** is identified with a Host icon 🟢 beside their name in the participating systems list. • If you are scheduling for yourself and do not have any associated systems (are not a delegate), your system is automatically marked as host. • If you are scheduling with an OTN-registered system (personal or room-based), no participant is marked as host and you must identify the host. • If you are scheduling with a non-OTN system, select a participant from the search results or input your own participant name. (See standards-based requirements 📕.) 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.*
Host PIN	The Host PIN is required for events scheduled in the future or when you join your event using the **Host URL** via the Event Details, via a delegate's email, or via the "Start eVisit" link in the invitation email. (You do not need the Host PIN when you join an event using the event's Call button.) • If you want the system to automatically create a Host PIN for the session, leave the number that appears by default in the field. • If you want to specify a Host PIN yourself, type a 6 digit number in the field.
Guest PIN	To increase security, you can add a "guest" PIN 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 all participants yourself and provide them with the PIN. Required for an event that includes a non-OTN system.

Continued next page....

Figure 9: Change consultant system

Figure 10: Consultant field drop-down list

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* 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
Event Options	
Opt out of PCVC time conflicts	If you do not want OTNhub to check for scheduling conflicts, select this option.
	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	Defaults to 'Clinical Event', 'Learning Event', or 'Meeting' based on the selected Event Type.
	To customize the title, 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'.

3. To initiate the invitation request:

- If the event will occur in the future, click [Schedule] and skip to page 10 for instructions.

- If you want the call to start immediately, click [Call Now] * and continue with the instructions on the next page..

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* If you are scheduling on behalf of another user (that is, you are associated with their system (a delegate), you can only schedule an event. The "Call Now" button is inactive.

If you selected "Call Now"

A **Create Event confirmation** panel appears with the invitation details.

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

ii.) To send the invitation, click the **Create** button.

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 at eVisit Help Centre⧉.

Videoconference Host (usually you, the person creating the invite):
- When connected, a "Welcome" video panel appears. If you are the first participant to enter the conference, 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 videoconference. (See Connecting as a Host in an Unscheduled Event from within OTNhub on page 19.
- In the background, the videoconference is added to your **Events List** and its **Event Details** become available. (See Viewing Event Details on page 13.)
- You do not receive a copy of the invitation email.

Your Admin Contact (if set up in your Videoconference Settings [page 4]):
- 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).
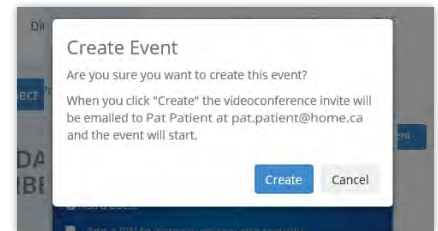
Continued next page...

Figure 11: Confirmation - call now

Figure 12: Event in Events List

Figure 13: Event details

If you selected "**Schedule**"

A **Schedule event with** panel appears.

i.) 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.

ii.) 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.)

A **Schedule Event confirmation** dialog box appears with the invitation details.

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

iv.) For "Guests via email (OTNinvite)" participants, you can change the **Consent to include personal health information in an OTN invite email**.

v.) The host or someone associated with their system (a delegate) can update the **Administrative Contact** information. To add or change admin contact info, click the "*update*" link and follow the on-screen prompts. Once saved, the contact will be remembered for the host's future events, and the host's videoconference settings will also be updated.

vi.) If a clinical event involves a "guest via email, to review a 'patient handout' with the event details, select the "*View the patient handout*" check box. (This is for your review only. The handout is **not sent** to the patient automatically. If needed, you can give it to the patient yourself.)

vii.) To send the invitation, click the **Schedule** button.

If you have not opted out of conflict checking, 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.

Continued next page...

Figure 14: Schedule panel

Figure 15: Confirmation - schedule and send invite (clinical)

If there are no conflicts:

Invitee:

- Is immediately 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 at eVisit Help Centre.
- 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).

Videoconference Host (the person creating the invite):

- 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 videoconference 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 [page 4]):

- 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).
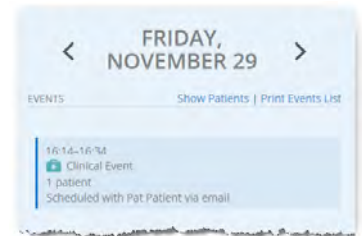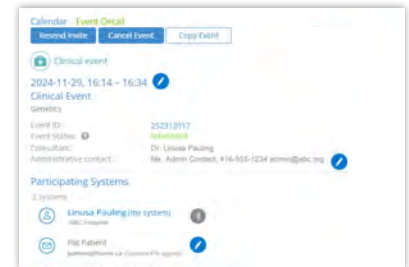

Figure 16: Event in Events List
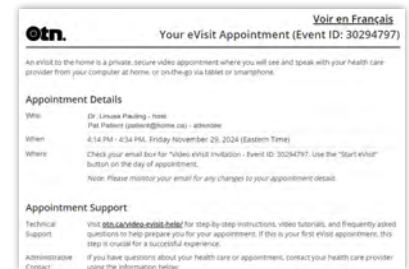

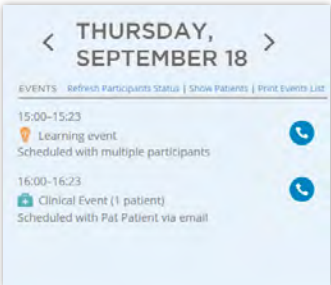**Figure 17:** Event details

Figure 18: Patient handout
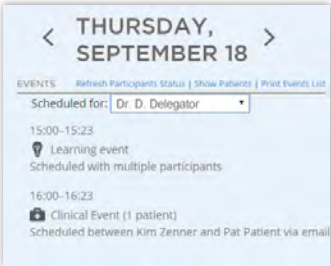
4   Viewing the Events List

The **Event List** displays all your video visit events for the selected day.

If you are associated with a system (a delegate), you can view the Events List for that system.

1. Sign in at otnhub.ca and access the **Videoconference** service.

    By default, an event appears in the Events list if it involves your eVisit (Videoconference) system or you are a consultant, organizer, requestor or presenter in the event.

2. To view an associated system's or delegator's **Events List**, click the **Scheduled for** drop-down field and select the desired name.

    The list refreshes to display events for your selected delegator's system.

3. To view the current status of guests in listed events, click **Refresh Participants Status** at the top of the list. See Viewing Participants' Status on page 18. (Appears only on the current date - not for past or future dates.)

Figure 19: Standard Events List (For example, as seen by a delegator.)

Figure 20: Delegate's Events List

5 Viewing Event Details

The **Event Details** page is where you can review the details and access more information about an event. After you schedule a video visit, 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 Field Descriptions 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.
    Or use the **Search by Event ID** field in the top navigation bar.
    (Enter the full Event ID and then click 🔍 or press Enter on your keyboard).

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

3. To return to the monthly calendar, click the **Calendar** link in the top left of the Event Details panel.
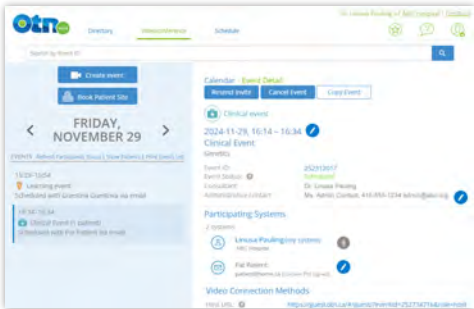

Figure 21: Event list and event details

Field Descriptions

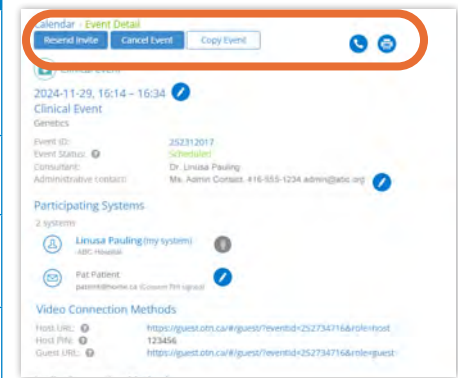| Field	Description
Call 📞	Appears at the top right of the details panel, only on the event's scheduled start date. See Hosting your Videoconference on page 19.
Print 🖨	Open your browser's print function to create a printer-friendly version of the Event Details.
Re-send Invite	Appears up until 11:59 p.m. of the event's scheduled date. See Re-sending an Email Invitation on page 29.
Cancel Event	When you cancel an event, an email is sent to your invitee notifying them of the cancellation. See Cancelling an Event on page 30.
Copy Event	You can create a new event (based on the details of an existing event) at any time. See Copying an Event on page 28.

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Figure 22: Event actions

Field Descriptions

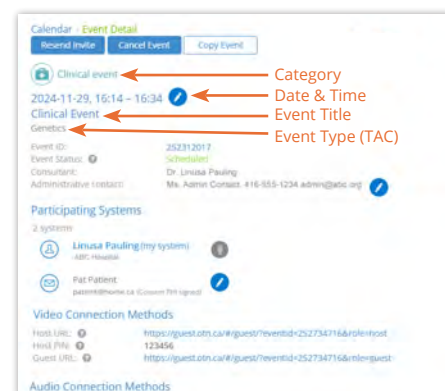| Field (in order of appearance)	Description
Event Summary Information	
Category	💡 **Learning** events involve a speaker and an audience, such as conferences, workshops, interest group sessions, training programs, or lunch and learn sessions.
	👥 **Meeting** events involve organizational, operational, or management content such as committees, working groups, project status reports, or interviews.
	🔵 **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.
Date, Start Time, and End Time ✏	The event's scheduled date (YYYY-MM-DD), and the start and end times in 24 hour format (HH:MM).
	You can change these fields up until 11:59 p.m. of the event's scheduled date. To update, click ✏ and follow the on-screen prompts. See Updating an Event on page 27.
	For scheduled calls, the time includes Setup time, which occurs before the event's official start time. For example, if an event starts at 8:00 a.m. with 10 minutes setup time, the reservation on your system begins at 7:50 a.m.
Event Title	The title given to the event by the person who created the event.
	If no title was provided, the default 'Clinical Event', 'Learning Event', or 'Meeting' appears.
Event Type or Therapeutic Area of Care (TAC)	Identifies the event's general subject matter. For example, cardiology or ophthalmology.
	This is set by the event type in the consultant's Videoconference Service settings. (See Managing Your eVisit Service Settings 📄.)
Event ID	A unique number assigned to every videoconference.
	If you need to contact the event's organizer or Ontario Health (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.
Event Status	For events scheduled using OTNhub, the status can be 'scheduled' or 'cancelled'.
	For events scheduled with a PAN site or using Ncompass, the status can be 'scheduled', 'cancelled', or 'pending'.
	A pending status means that the host site has not yet confirmed all the patient appointments.
Consultant, Speaker, or Char	Clinical events show the Consultant's name. Learning events show the Speaker's name. Meeting events show the Chair's name.
Administrative Contact ✏	Information identifying the person to contact for questions about the event. The host or their delegate can update this information.
	To add Administrative Contact information or change the contact information, click ✏ and follow the on-screen prompts.
	For more details about the Administrative Contact information, see Setting or Updating Admin Contact Information on page 4.

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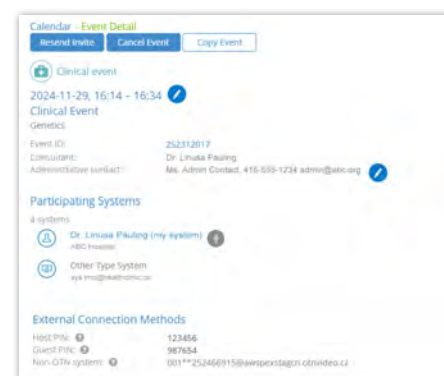

Figure 23: Clinical event details guest via email

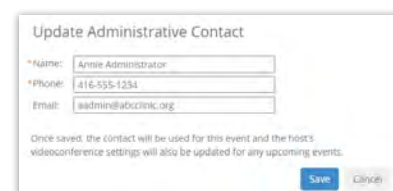**Figure 24:** Clinical event details non-OTN system

Figure 25: Update administrative contact

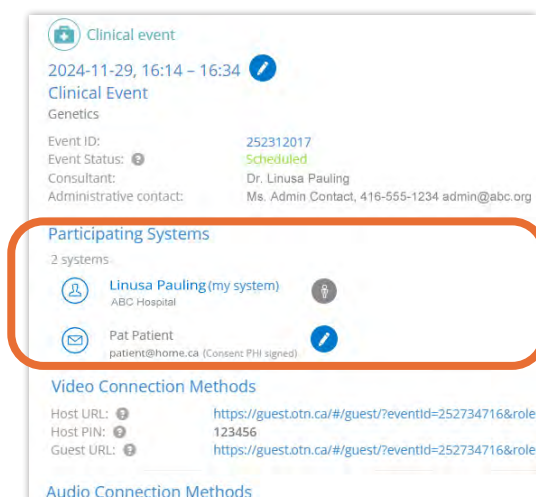| Field (in order of appearance)	Description
Participating Systems	
Type	Identifies what type of system the participant uses:
	👤 OTN personal user (PCVC)
	🖥 OTN room-based system
	✉ Guest via email (OTNinvite)
	🖥 Non-OTN system (standards-based)*
Name	For Guest via email (OTNinvite), the name and email address of the invited guest and, if selected, an indicator for consent to PHI in email.
	• To change the guest name or email or their choice for consent to PHI in email, click 🖊 and follow the on-screen prompts.
	For OTN systems, the system and organization names.
	For Non-OTN systems, the name and email address of the person responsible for the system.
Consultant	👤 Identifies the participant who is the consultant for the event.
	For Learning events, the speaker.
	For Meeting events, the chair.
Status	Appears only when there is at least one participant connected in an event on the current date.
	Before the host joins, the guest status is "waiting". After the host** joins, all participants show a status of "connected".
	The panel lists the time, name, and role of any participant who is waiting or connected. See Viewing Participants' Status on page 18.

Continued next page...

Figure 26: Clinical event details

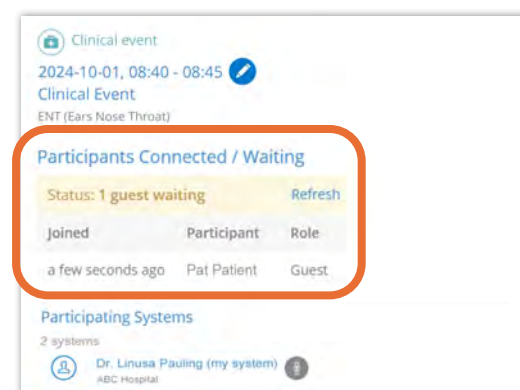**Figure 27:** Participants status

* See standards-based system requirements 📄.

** Or when a delegate joins the video visit as host.

Field (in order of appearance)	Description
Video Connection Methods	
Host URL	The host's link address for the virtual 'room' where the videoconference will take place. This is a unique link for each videoconference.
	If you are the **host** for the event, use this link to access the videoconference. Until the host joins, all other participants remain in the virtual "waiting room".
	If you are a **delegate** and you will also attend the event, open the invitation email and use the **Start eVisit link** to join the videoconference (or the Guest URL in the event details).
	You can use the Host link to test your videoconference setup, up to and including the day of the event.
	See Connecting as a Host via OTNhub – Using the Host URL on Windows (PC) or Mac on page 22
Host PIN	The eVisit (Videoconference) app uses this PIN to identify who is hosting the event. Each event can have only one host.
	When the host enters the videoconference using the Host PIN, it signals eVisit to connect all active participants.
Guest URL	For all participants who are not the host, the link for the virtual 'room' where the videoconference will take place. This is a unique link for each videoconference.
	This is an active link that can be used to test the participant's videoconference setup before the day of the event.
	See Connecting as a Delegate/Guest via an Email Invitation on Windows (PC) or Mac on page 24.
Guest PIN	The PIN set by the event's creator to add an extra layer of security to the event.
	Only appears if a PIN has been set by the event's creator.
	When a PIN is set, the invitee must 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 participant in a separate communication.
Audio Connection Methods	
Audio Phone No	The phone number to be used by participants who cannot join via video and participate via audio line only.
Audio Host PIN	A six digit number to be used by the host, if they will join via audio only.
Audio Guest PIN	A six digit number to be used by guest participants, if they will join via audio only.
Non-OTN System	Appears only when a participating system is a non-OTN system (standards-based).
	The participant can use this alias to dial in to the event using their standards-based system.

Continued next page...

Figure 28: Clinical event details Connection Methods

Field (in order of appearance)	Description
Patient or Guest Details	
Patient Letter or Guest Handout	Appears only for events created via OTNhub. A link to open a new browser window with a printer-friendly summary of the event details.
	This summary can be printed and given to the patient/guest prior to their scheduled eVisit.
Number of Patients ✏	Appears for only clinical events.
	The number of patients that will be seen or discussed during the videoconference.
	Change the **Number of patients** at any time by clicking ✏ beside the number and then type a new number, and submit. See Updating an Event on page 27.
	If you *scheduled the event with a PAN site or using Ncompass*, to change the number of patients, click the Event ID to open the clinic in Ncompass and edit there.
Patient Information	Appears for only clinical events scheduled using Ncompass or scheduled with a PAN site.
	Demographic information for patients who are scheduled and confirmed in the event (*i.e.*, who are not pending or cancelled).
	• If you are the consultant, you will see all the patient information listed.
	• If you are at the patient site, only patients scheduled for your specific system appear. Other scheduled patients appear as *****.
Event Details	
Appointment Requirements	If provided by the event creator, describes what type of assessment might be required in advance of the appointment or any other notes related to the event
Scheduled By	The name of the person who scheduled the event.
Last Edited By	The name of the person who last edited the event.
Last Edited	The date and time when the event was last updated (mm/dd/yy HH:MM AM or PM.)

Figure 29: OTNhub-scheduled event

Figure 30: Ncompass-scheduled event

Figure 31: OTNhub-scheduled Patient Host Site (PAN) event

Viewing Participants' Status

On the current date, an event's host and anyone associated with the host's system (a delegate) can see at a glance if any participants have joined a scheduled video visit.

The Events List displays a summary of participant status for each event.

1. To check the most recent status for all listed events,
   click the **Refresh Participant Status** link at the top of the list.

   • When participants have joined an event but the host has not yet joined, the number of *waiting* guests appears highlighted with yellow.

   • After participants have joined an event and the host is also present, the number of *connected* participants appears highlighted with green.

   The status includes both participants and the host.

2. To view details about the waiting or connected participants, click the event entry in the Events List.

   The Event Details displays a **Status** panel that lists for each participant:

   • The name entered when they joined the video visit.
   • Their role - either 'guest' or 'host'.
   • The time when they last joined.
     (If the time appears as text such as "a minute ago", to view a pop-up with the exact time, move your mouse over the text.)

3. To view the most current status details and refresh the Events List:

   • Click the **Refresh** link at the top-right of the Status panel in the Event Details.

   • Or click the **Refresh Participants Status** link at the top of the Event List.
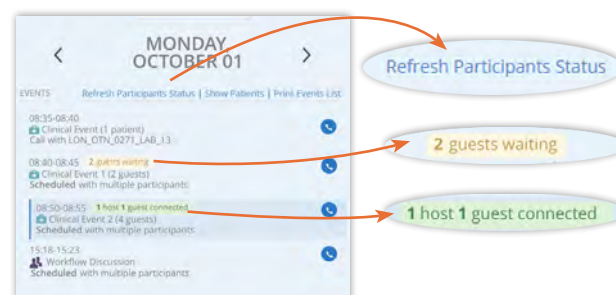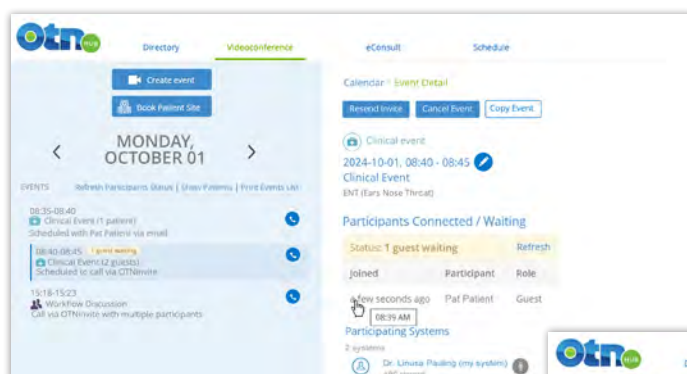

Figure 32: Status in Events List

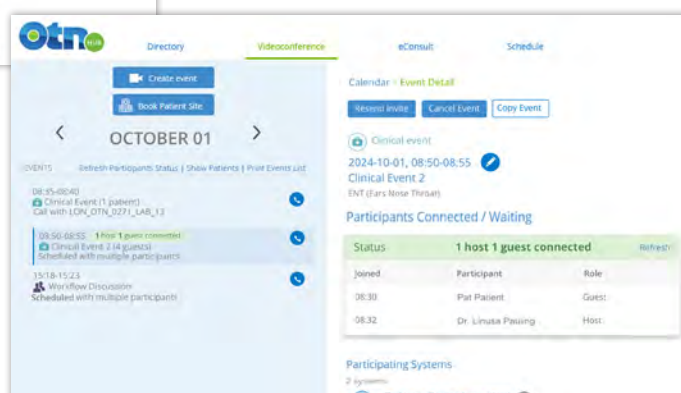**Figure 33:** Event details with 'waiting' status

Figure 34: Event details with 'connected' status

6 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.

As a host or as someone associated with the host's system (a delegate), you can connect to an eVisit in different ways. Follow the instructions that match your situation:

- Connecting as a Host in an Unscheduled Event from within OTNhub (see below)
- Connecting as a Host in a Scheduled Event from within OTNhub on page 20
- Connecting as a Host via a Mobile Device (not using OTNhub) on page 21
- Connecting as a Host via OTNhub – Using the Host URL on Windows (PC) or Mac on page 22
- Connecting as a Host via Email Invitation – Using the Host PIN on Windows (PC) or Mac on page 23
- Connecting as a Delegate/Guest via an Email Invitation on Windows (PC) or Mac on page 24

Only after the host connects will all participants be connected.

Connecting as a Host in an Unscheduled Event from within OTNhub

To start a videoconference that begins immediately, when creating the invitation, click [Call Now].

1. When you **Call Now**, a video panel 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 videoconference 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 videoconference. This helps prevent privacy incidents. See Locking an event joined via a Start Now invitation on page 26.

3. The videoconference controls are the standard ones, as described in the user guide Using the Video Window 🗒.
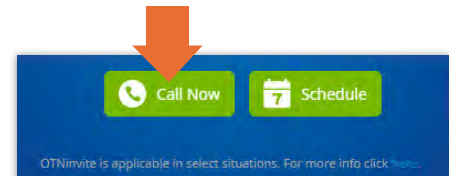
Figure 35: Create invite - start now button
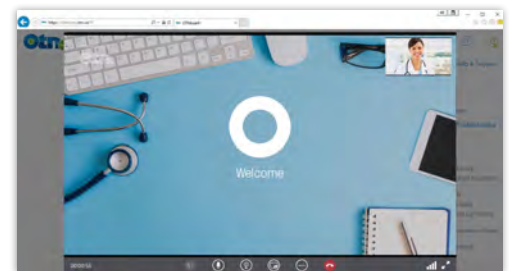
Figure 36: Video welcome screen

Figure 37: Video in session

Connecting as a Host in a Scheduled Event from within OTNhub

If you have previously scheduled the videoconference, *on the scheduled date* a blue **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. Locate the desired event.
   • Use the **Search by Event ID** field in the top navigation bar.
   • Or use the **Calendar** to 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 the **Call button** 📞 either in its Events List entry or in the details panel.

4. When you 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.
   • When at least one other participant joins the event, the Welcome image will be replaced by a video image.
   • If the other participant(s) have started early, they will see the Welcome image until you join the call.

5. For multi-point calls, after all participants have joined the meeting, take a roll call and then lock the videoconference. This helps prevent privacy incidents. See Locking an event joined via a Start Now invitation on page 26.

6. The videoconference controls are the standard ones, as described in the user guide Using the Video Window 📄.

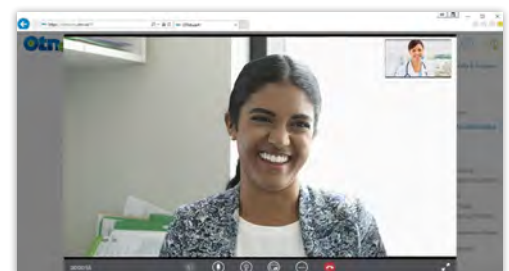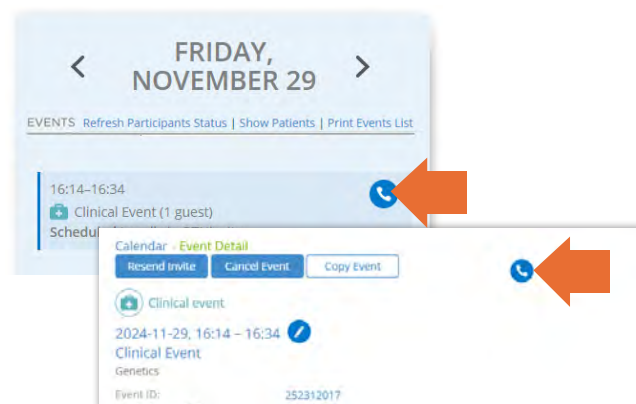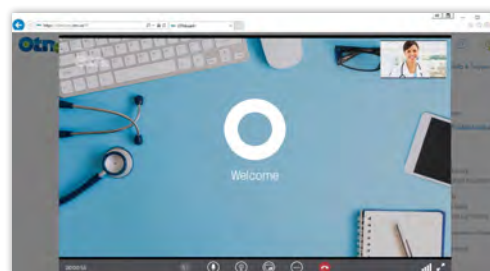**Figure 38:** Call button in Events List and Event Details

Figure 39: Welcome screen

Figure 40: Video in session

Connecting as a Host via a Mobile Device (not using OTNhub)

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

Figure 41: Event access screens

Hosting a **group meeting**?
If yes, see also Hosting Group Video Visits ▣.

Figure 42: 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 as a Host via OTNhub – Using the Host URL on Windows (PC) or Mac

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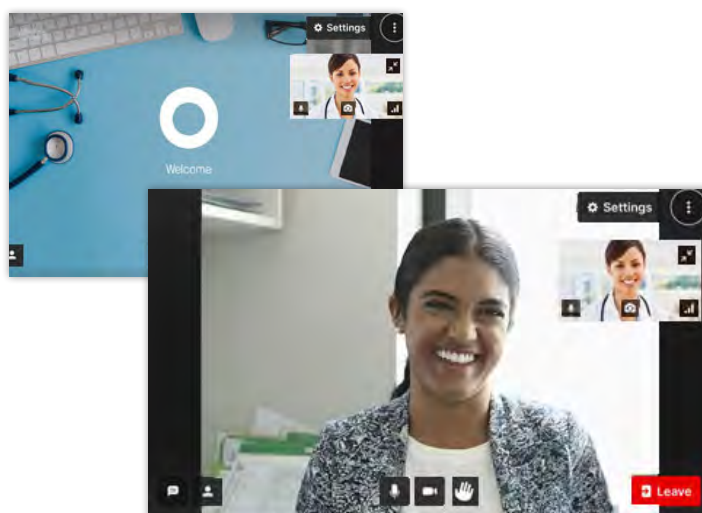
To do this they must use the Host URL because a Call button does not appear for delegates. For example, when a delegate notices that a patient has already joined an event and they want to temporarily join as a host to notify the patient about the doctor's pending arrival.

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

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

1. Locate the desired event.
   - Use the **Search by Event ID** field in the top navigation bar.
   - Or use the **Calendar** to 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 #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 , enter the **Host PIN**, and then click Next.

8. 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 [↗].

9. For multi-point calls, after all participants have joined the meeting, take a roll call and then lock the videoconference. This helps prevent privacy incidents. See Locking an event joined via a Host URL on page 25.
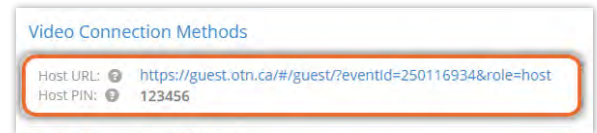
Figure 43: Host URL and Host PIN in event details

Figure 44: Event access screens

Figure 45: 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.

Connecting as a Host via Email Invitation – Using the Host PIN on Windows (PC) or Mac

An eVisit email contains a link for joining the videoconference.

> (!) **To join as the "host", you need the Host PIN**.

1. Open the event's email invitation and click **Start eVisit** .
(Note: Your browser must be set to allow pop-ups.)

   Your default browser opens.

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".

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 Yes.

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

5. Enter the **Host PIN** then click **Next**.
   - 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 🗎.

6. For multi-point calls, after all participants have joined the meeting, take a roll call and then lock the videoconference. This helps prevent privacy incidents. See Locking an event joined via a Host URL on page 25.

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.
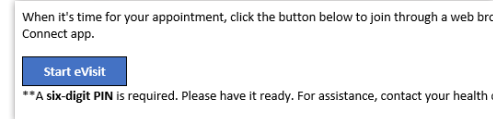

When it's time for your appointment, click the button below to join through a web br... Connect app.

Start eVisit

A **six-digit PIN is required. Please have it ready. For assistance, contact your health ...

Figure 46: Email invitation with Start button

Display name

Self view

PIN field

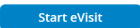**Figure 47:** Event access screens

Figure 48: Video in session

Connecting as a Delegate/Guest via an Email Invitation on Windows (PC) or Mac

If your are associated with a system (that is, a delegate), you can join an eVisit the same way that other invited participants join.

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

1. Open the email invitation and click **Start eVisit**.

   Your default browser opens.

Figure 49: Email invitation with Start button

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".

Figure 50: Event access screens

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.

Figure 51: 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.
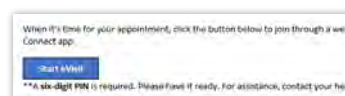
Locking your videoconference

When you first join your videoconference, it is unlocked.

For one-on-one calls, you do not need to lock the videoconference.

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

The "lock" process is available only for the host and is different depending on how the host joined the videoconference:

* Locking an event joined via a Host URL (see below)
* Locking an event joined via a 🟢 Start Now invitation or via the Call button (page 26).

Locking an event joined via a Host URL

As your invited participants join the videoconference, the name that they entered when joining appears in the Participants panel.
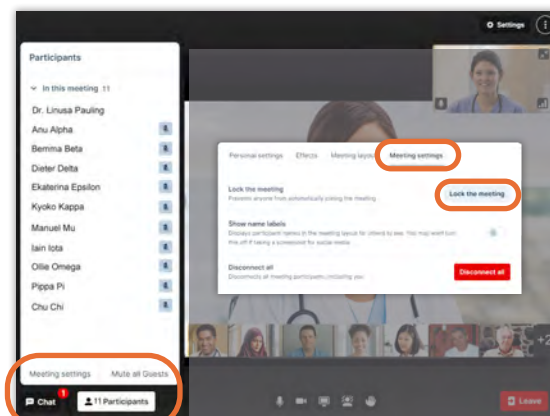
The **Participants panel** appears on the left side of the video window. The participant list is sorted based on when a participant joined the videoconference (most recently joined at the top of the list).

1. Monitor the participants list and after everyone has joined, perform a roll call. After you have confirmed who is in the call, you can lock the video visit.

2. To show or hide the **Participants Panel**, click 👤 Participants in the bottom-left of the video image.

3. Click the **Meeting settings** link at the bottom of the panel.

   A control panel appears with the **Meeting settings** tab open:

4. Click the **Lock meeting** button.

   While the videoconference is locked, the host sees an indicator on the right side of the video panel.

5. To hide the Meeting settings panel, click anywhere outside the panel.

6. To unlock the videoconference, access the Meeting settings again and click the **Unlock meeting** button.
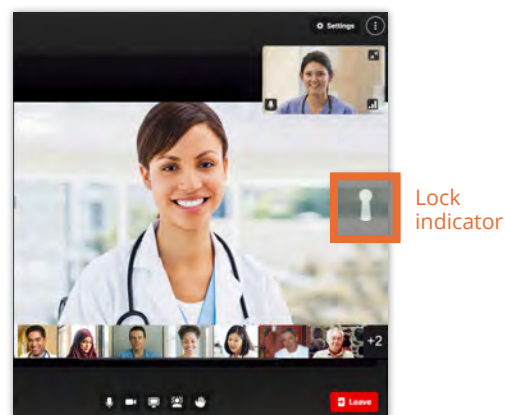
ⓘ **If a participant needs to reconnect or join late:**
* You must unlock the videoconference to allow them to join the event
* Or open the Participants panel and click "**Admit**" for the person waiting.

Figure 52: Participant panel and Meeting settings tab

Figure 53: Lock indicator

Locking an event joined via a Start Now invitation (or via the Call button)

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 ⬤.

4. To unlock the videoconference, click the red Lock ⬤ button in the Participants panel.

    While the videoconference is unlocked, the Lock button appears blue ⬤.

Figure 54: Video window with participants panel

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

7 Updating an Event

> ⚠️ **Invited participants are notified when the Date, Start Time, Email*, or PHI consent** changes.**
>
> **Invited participants are not automatically informed when you update the End Time or Patient Number (you can** re-send **the invitation if you need to inform participants about these updates).**

The event's creator, the event's host, or someone associated with their system (a delegate) can update a future-scheduled eVisit OTNinvite event. You cannot edit a cancelled event.

You can change the scheduled date, start time, and end time up until the end of the day (23:59) on which the event is scheduled to occur. For example, if you mistakenly blocked off too much time when creating the original invitation.
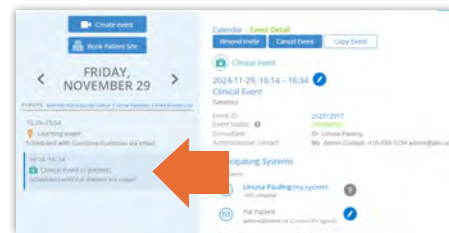
For clinical events you can update the number of patients before or after the event has occurred.
For example, if you originally planned to discuss two patients, but ended up discussing an additional case.
(The accuracy of this number is important because it is used for reporting purposes, both for Ontario Health (OTN) and the Ontario Ministry of Health.)

If you need to change a field not available for editing 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. Locate the desired event.
   - Use the **Search by Event ID** field in the top navigation bar.
   - Or use the **Calendar** to navigate to the date on which the videoconference is scheduled and locate it in the **Events List**.

3. To view the event details, click the event listing.

   The **Event Details** panel appears.

4. To edit the **Date**, **Start Time**, **End Time**, **Number of Patients**, or a **guest name, email*** or **PHI consent****, click 🖉 beside the field.

   The displayed value(s) are replaced by text field(s) with **Submit** (or **Save**) and **Cancel** buttons.

5. Select or type the new values and click **Submit** (or **Save**).

   If you changed the **Date** or **Start Time**:
   - A confirmation pop-up appears. Confirm the information is correct and click **Reschedule**.
   - Participants are automatically sent an email notification with the new information.

6. To add or update **Administrative Contact** information, click 🖉 beside the field and follow the on-screen prompts.

   If you changed the **End Time**, **Patient number**, or **Administrative Contact**, no confirmation appears and the invited guests are not sent an automatic notification.

   Since no notification is auto-sent when the **End Time** changes, the host or someone associated with their system (a delegate) can re-send the invitation to notify participants.

Figure 55: Event list invitation item
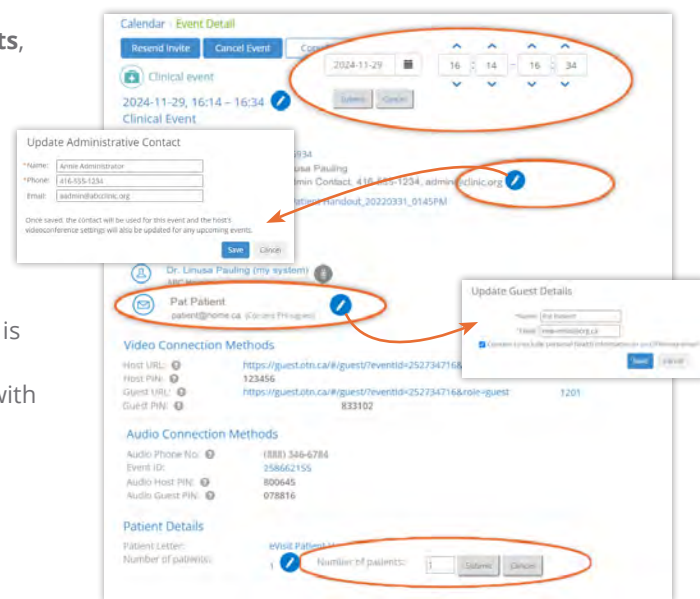
Figure 56: Event details field edits

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*   If you change a participant's email address, an OTNinvite email invitation is sent to the new email address.

** If PHI Consent is already checked, you cannot change the consent setting unless the email address is also changed.
    If PHI Consent is not already checked, you can change consent to yes and then a new OTNinvite email with PHI included
    is sent to the email address.

8   Copying an Event

You can copy an 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. Locate the desired event.
   - Use the **Search by Event ID** field in the top navigation bar.
   - Or use the **Calendar** to navigate to the date on which the videoconference is scheduled and locate it in the **Events List**.

Figure 57: Events list invitation event

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: guest name, guest email, host PIN and guest PIN if desired, and the event settings (event type, title, etc.).

   Add or remove participants as needed.
   (Maximum participants: 60)
   For details, see [Setting up the Video Visit](#) on page 6.

Figure 58: Event details

5. Click Call Now or Schedule .

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

6. If you are scheduling a future event, a Schedule event 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, and want to view a 'patient handout' summarizing the event details, leave the **View the patient handout** check box selected.

Figure 59: Copy event pop-up

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

   For information about what happens next, see [Connect Now](#) description on page 9, or [Schedule Events](#) description on page 10.
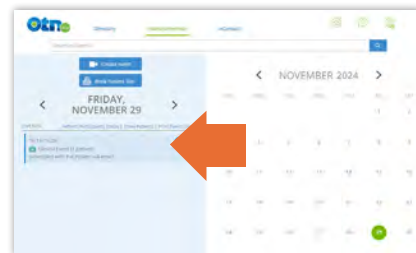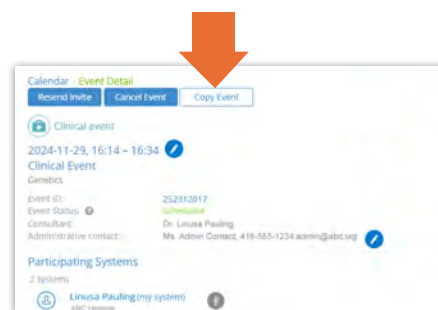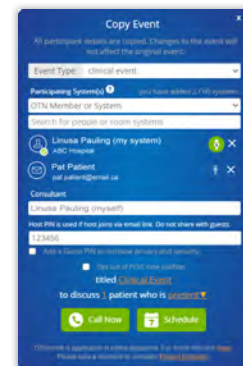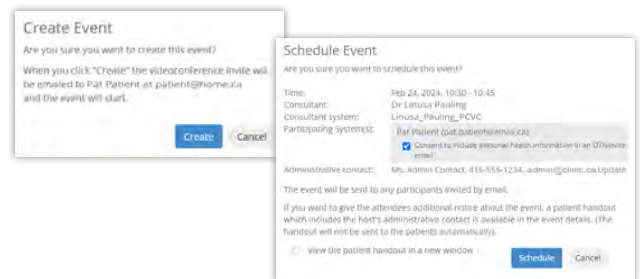

Figure 60: Confirmation messages

*Events created in Ncompass can be copied or modified only in Ncompass.

9 Re-sending an Email Invitation

You (the event's creator) or someone associated with your system (a delegate) can re-send an email invitation for 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. Locate the desired event.
   - Use the **Search by Event ID** field in the top navigation bar.
   - Or use the **Calendar** to navigate to the date on which the videoconference is scheduled and locate it in the **Events List**.

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

   The **Event Details** panel appears.

4. To re-send the invitation, click `Resend Invite`.

   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 `Resend`.
   - 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.)
   - If your are associated with a system (that is, a delegate) re-sending on behalf of the host, you will not receive a copy of the email.
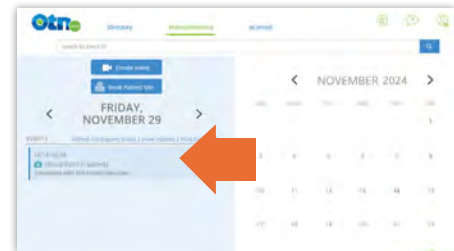   - A success message appears.
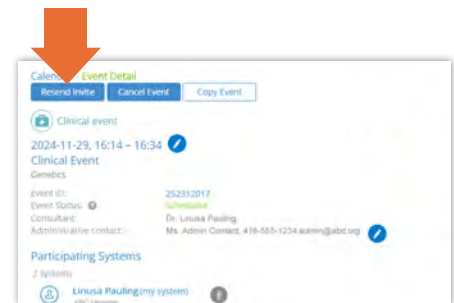

Figure 61: Events list invitation event
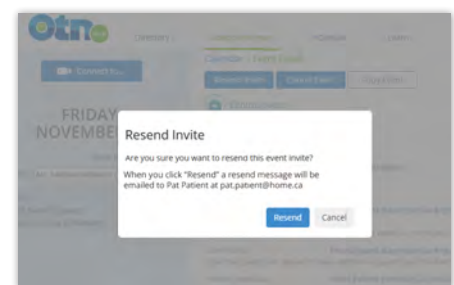

Figure 62: Event details

Figure 63: Re-send confirmation message

10 Cancelling an Event

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

You can cancel a future-scheduled videoconference that you previously created.
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. 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. Locate the desired event.
   - Use the **Search by Event ID** field in the top navigation bar.
   - Or use the **Calendar** to navigate to the date on which the videoconference is scheduled and locate it in the **Events List**.

Figure 64: Event list with invitation event

3. To view the event details, click the Event List entry.

   The **Event Details** panel appears.

4. To cancel the invitation, click Cancel Event .

   A confirmation dialog box appears.

Figure 65: Event details before cancellation

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.)
   - 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.
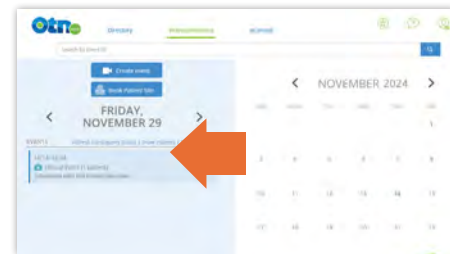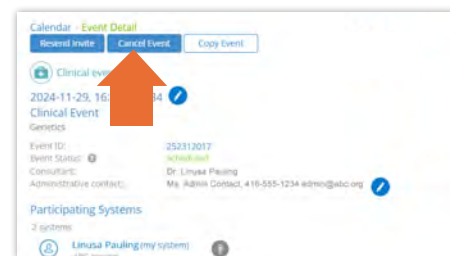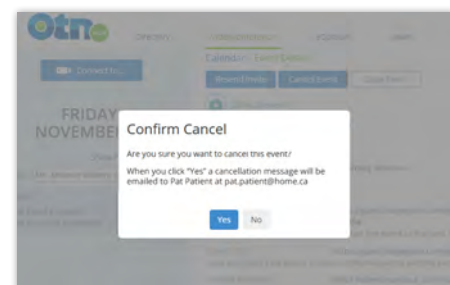

Figure 66: Cancellation confirmation message