Using eVisit Invitations (OTNinvites)

This guide contains instructions to help you understand the basics of inviting a participant, who is not a registered OTNhub user, to join an eVisit videoconference. This involves creating and sharing:

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

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For further assistance and technical support, contact OTN Technical Support

Phone: 1-855-654-0888  Email: techsupport@otn.ca

438 University Avenue, Suite 200, Toronto, ON, M5G 2K8
Understanding eVisit Invitations

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

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

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

You can also give your invitees a unique ‘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.

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

Recommend to the people you invite that they use a Chrome or Firefox browser for their videoconferencing. These browsers provide better support for videoconferencing features.

Invited users have the following limitations:
- They can only join conferences; they cannot start them.
- They can neither make direct calls nor can they receive direct calls.

Participant Requirements

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

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

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

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

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

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

eVisit Invitation Best Practices

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

Email considerations

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

Privacy and Security Incidents

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

General Privacy and Security Practices

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

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Setting or Updating Admin Contact Information

Before you start sending eVisit invitations, OTN recommends that you first set up your Administrative Contact. The administrative contact information identifies who videoconference participants should contact if they have questions about the event.

You can put your own contact information here or identify the person who manages your videoconferencing schedule. It is the only contact information that appears in email invitations for learning or meeting* events.

For all learning and meeting events (if an Admin Contact is provided):
  - The Administrative Contact is sent a copy of all invitations.
  - If the Administrative Contact changes per event, please remember to change the information in Self Serve.

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

<table>
<thead>
<tr>
<th>Clinical Events</th>
<th>Learning &amp; Meeting Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Invitation*</td>
<td>X</td>
</tr>
<tr>
<td>Patient Handout</td>
<td>✓</td>
</tr>
</tbody>
</table>

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 Services link. The Services screen appears.

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

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

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

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

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

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

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

3. To access invitation settings, click the Connect to selector or click Guest Via OTNinvite beside the toggle switch. The fields displayed within the form depend on which Call Purpose you select: clinical, learning, or meeting.

4. Fill in the fields as described below.

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

* Delegator names are listed alphabetically by last name.

Figure 4: “Connect to...” link

Figure 5: Clinical invitation form

Figure 6: Learning invitation form
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host PIN</td>
<td>The “host” PIN is required 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.)</td>
</tr>
<tr>
<td></td>
<td>• If you want the system to automatically create a Host PIN for the session, leave the number that appears by default in the field.</td>
</tr>
<tr>
<td></td>
<td>• If you want to specify a Host PIN yourself, type a 6 digit number in the field.</td>
</tr>
<tr>
<td>Guest PIN</td>
<td>To increase security, you can add a “guest” PIN that a participant must use to join the videoconference.</td>
</tr>
<tr>
<td></td>
<td>• If you want the system to automatically create a unique PIN for the session, leave the number that appears by default in the field.</td>
</tr>
<tr>
<td></td>
<td>• If you want to specify a PIN yourself, type a 6 digit number in the field.</td>
</tr>
<tr>
<td></td>
<td>For privacy and security reasons, the email invitation will not include the PIN. You must contact the invitee yourself and provide them with the PIN.</td>
</tr>
<tr>
<td>Call Purpose</td>
<td>Clinical events involve at least one health care provider and one or more patients who are discussed or participate in the call.</td>
</tr>
<tr>
<td></td>
<td>Learning events involve a speaker and an audience, such as conferences, workshops, interest group sessions, training programs, or lunch and learn sessions.</td>
</tr>
<tr>
<td></td>
<td>Meeting events involve organizational, operational, or management content such as committees, working groups, project status reports, or interviews.</td>
</tr>
<tr>
<td>Event Title</td>
<td>Required for learning and meeting events. (For clinical events, if you don’t provide a title, the default title is ‘Clinical Event’.)</td>
</tr>
<tr>
<td></td>
<td>Type a meaningful title in the field and to ensure readability use a title that is less than 100 characters.</td>
</tr>
<tr>
<td># of patients to be discussed or seen</td>
<td>Required for clinical events. Defaults to ‘1’.</td>
</tr>
<tr>
<td></td>
<td>Type the number of patients that will be seen (or discussed) during the call.</td>
</tr>
<tr>
<td>Patient Present?</td>
<td>Required for clinical events. Defaults to ‘present’.</td>
</tr>
<tr>
<td></td>
<td>If no patient will be present during the call, select ‘not present’.</td>
</tr>
<tr>
<td>‘I am’ or ‘a third party is’ the Consulting HCP</td>
<td>Required for clinical events. Defaults to ‘I am’.</td>
</tr>
<tr>
<td></td>
<td>Identify your role in the videoconference by selecting whether you, or a third party is the consulting health care professional.</td>
</tr>
<tr>
<td>Date* and Time</td>
<td><strong>Start now &amp; Send Invite:</strong> Select this option if you want the videoconference to start as soon as you click the Send Invite button.</td>
</tr>
<tr>
<td></td>
<td><strong>Schedule &amp; Send Invite:</strong> Select this option if you want the videoconference to occur at a future date or time.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.)</td>
</tr>
</tbody>
</table>

Continued next page...
5. To initiate the invitation request, you have two choices:

- To select a future start time, click **Schedule & Send Invite** and skip to the next page for instructions.
- To select an immediate start time, click **Start Now & Send Invite**.

If you selected **Start Now & Send Invite**:
A Create Event confirmation dialog box appears which contains the invitation details (Figure 8 or Figure 9).

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 on page 14.)
- In the background, the videoconference is added to your Events List and its Event Details become available. (See Viewing Event Details on page 10.)
- You do not receive a copy of the invitation email.

Your Admin Contact (if set up in your Videoconference Settings):**
- For non-clinical events, the Admin Contact receives a copy of the email invitation.
- For clinical events, the Admin Contact does not receive a copy (only the invitee receives the email invitation).

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* If you are a delegate scheduling on behalf of another user, you can only schedule an event. The “Start Now & Send Invite” button is inactive.
If you selected a future start time, Schedule & Send Invite:

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, which contains the invitation details.

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

iv.) To view a ‘patient handout’ summarizing the event details, leave the “View the patient handout…” checkbox selected.

v.) To send the invitation, click the Schedule button.

The system checks your eVisit (Videoconference) calendar for conflicts. If your system is already booked for the specified date and time, an error message appears at the top of the panel. Select a different date or time and then click the Schedule and Send Invite button again.

If there are no conflicts:

Invitee:

- Is 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 (usually you, 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):

- 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).
Viewing the Events List

The Event List displays, by day, all of your pre-scheduled telemedicine events.

If you are a delegate, you can view the Events List for any delegator with whom you are associated.

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

   By default, an OTNinvite 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 a delegator’s Events List, click the Delegator drop-down field and select the desired name.

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

   Events for which you are a delegate appear with a grey Event Type icon (e.g., ☑️ clinical or 🔗 meeting) and will not include an active Call button.

*Figure 17: Events List with no delegators*

*Figure 18: Delegate’s Events List*
Viewing Event Details

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

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

To view the event details:

1. Using the **Calendar** panel, navigate to the event’s scheduled date and locate the event in the Events List.
2. To view the event details, click its **Events List** entry.
3. To return to the monthly calendar, click the **Calendar** link in the top left of the Event Details panel.

### Event Actions

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call</td>
<td>Appears only on the date when the event is scheduled to start. See <strong>Hosting your Videoconference</strong> on page 14.</td>
</tr>
<tr>
<td>Re-send Invite</td>
<td>Appears up until 11:59 p.m. of the event’s scheduled date. See <strong>Re-sending an Invitation</strong> on page 25.</td>
</tr>
<tr>
<td>Cancel Event</td>
<td>When you cancel an event, an email is sent to your invitee notifying them of the cancellation. See <strong>Cancelling an Invitation Event</strong> on page 26.</td>
</tr>
<tr>
<td>Copy Event</td>
<td>You can create a new event (based on the details of an existing event) at any time. See <strong>Copying an Invitation Event</strong> on page 24.</td>
</tr>
<tr>
<td>Change Date, Start Time</td>
<td>Appears up until 11:59 p.m. of the event’s scheduled date. See <strong>Updating an Invitation Event</strong> on page 23.</td>
</tr>
<tr>
<td>Change Number of Patients</td>
<td>Appears for clinical events. See <strong>Updating an Invitation Event</strong> on page 23.</td>
</tr>
<tr>
<td>Host URL</td>
<td>A link to access the invitation event as <strong>host</strong>. See <strong>Connecting as a Host Using the Host URL - via OTNhub &amp; a Web Browser</strong> on page 16.</td>
</tr>
<tr>
<td>Guest URL</td>
<td>A link to access the invitation event as a <strong>delegate</strong>. (That is, as an invited “guest”). See <strong>Joining a Videoconference as a Delegate/Guest</strong> on page 20.</td>
</tr>
<tr>
<td>Patient or Guest Handout</td>
<td>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 when they are visiting their provider, prior to their scheduled OTNinvite event.</td>
</tr>
</tbody>
</table>
## Field Descriptions

<table>
<thead>
<tr>
<th>Field (in order of appearance)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Event Information</strong></td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td>Learning events involve a speaker and an audience, such as conferences, workshops, interest group sessions, training programs, or lunch and learn sessions. <strong>Meeting</strong> events involve organizational, operational, or management content such as committees, working groups, project status reports, or interviews. <strong>Clinical</strong> events involve a consultant and either another health care professional (where one or more patients will be discussed) or a patient or patient’s family.</td>
</tr>
<tr>
<td>Date, Start Time, and End Time</td>
<td>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. See <a href="#">Updating an Invitation Event</a> on page 23.</td>
</tr>
<tr>
<td>Event Title</td>
<td>The title given to the event by the person who created and sent the invitation. If no title was provided, the default ‘Clinical Event’, ‘Learning Event’, or ‘Meeting Event’ appears. On the day the event is scheduled to start a <strong>Call</strong> button appears beside the title, and you can <a href="#">connect to and join the videoconference</a>.</td>
</tr>
<tr>
<td>Additional information</td>
<td>For clinical events, the Consultant’s name appears. For meeting or learning events, The Presenter/Speaker/Chair’s name appears and if provided a description of the event.</td>
</tr>
</tbody>
</table>

*Continued next page...*
Using eVisit Invitations (OTNinvites)

<table>
<thead>
<tr>
<th>Field (in order of appearance)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>eVisit Invitation Details</td>
<td></td>
</tr>
<tr>
<td>Host URL</td>
<td>The host's link address for the virtual 'room' where the videoconference will take place. This is a unique URL for each videoconference. If you are the <strong>host</strong> for the event, use this link to access the videoconference. Until the host joins, all other participants remain in the virtual &quot;waiting room&quot;. If you are a <strong>delegate</strong> and you will also attend the event, use the Start eVisit link in the invitation email to join the videoconference (or the Guest URL). This URL is an active link that you can use to test your videoconference setup, up to and including the day of the event.</td>
</tr>
<tr>
<td>Host PIN</td>
<td>The PIN that identifies to eVisit (Videoconference) 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.</td>
</tr>
<tr>
<td>Guest URL</td>
<td>For all participants who are not the host, the link address for the virtual 'room' where the videoconference will take place. This is a unique URL for each videoconference. This URL is an active link that you can use to test your videoconference setup, up to and including the day of the event.</td>
</tr>
<tr>
<td>Guest PIN</td>
<td>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 for the event by the event’s creator. When a PIN is set, the invitee will have to enter it before they can join the videoconference. The PIN is not included in the invitation email and the person sending the invitation must give the PIN to the invitee in a separate communication.</td>
</tr>
<tr>
<td>Patient or Guest Handout</td>
<td>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 when they are visiting their provider, prior to their scheduled OTNinvite event.</td>
</tr>
<tr>
<td>Host System</td>
<td>The system name of the eVisit (Videoconference) user who created and sent the invitation and who will be hosting the videoconference.</td>
</tr>
<tr>
<td>Guests</td>
<td>The name and email address belonging to each of the people invited to the videoconference and to whom the invitation email was sent.</td>
</tr>
<tr>
<td>Total participants</td>
<td>The total number of participants scheduled for the videoconference. This includes the host, invited guests, and the host's delegate.</td>
</tr>
</tbody>
</table>

Continued next page...
Using eVisit Invitations (OTNinvites)

<table>
<thead>
<tr>
<th>Field (in order of appearance)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Details</td>
<td></td>
</tr>
<tr>
<td>Event ID</td>
<td>A unique number assigned to every videoconference. If you need to contact the event's organizer or OTN Customer Care, quote this number to identify the event. If you are a registered Ncompass user and the 'host system' of the event, the Event ID is an active link to open the Ncompass Event Details.</td>
</tr>
<tr>
<td>Number of Patients</td>
<td>The number of patients that will be seen or discussed during the videoconference. You can change the <strong>Number of patients</strong> for an event at any time. To change the <strong>Number of patients</strong>, click beside the number, type a new number, and submit.</td>
</tr>
<tr>
<td>Scheduled by</td>
<td>Only appears if the event was scheduled by a delegate on behalf of another person. Displays the name of the delegate who scheduled the event.</td>
</tr>
<tr>
<td>Last Edited by</td>
<td>Displays the name of the person who last edited the event.</td>
</tr>
</tbody>
</table>

**Figure 24:** Clinical event details
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 delegate, you can connect to an OTNinvite videoconference in different ways. Follow the instructions that suit your situation:

- Connecting as a Host in an Unscheduled Event (see below)
- Connecting as a Host Using the Call Button on page 15
- Connecting as a Host Using the Host URL - via OTNhub & a Web Browser on page 16
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Only after the host connects will all invited participants be connected.

Connecting as a Host in an Unscheduled Event (on-demand or ad-hoc)

To start a videoconference that begins immediately, when creating the invitation, click the Start Now & Send Invite button.

1. When you click Start Now & Send Invite, 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 22.

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

Figure 25: Create invite - start now button

Figure 26: Video welcome screen

Figure 27: Video in session
Connecting as a Host Using the Call Button

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. Using the Calendar, navigate to the date on which the videoconference is scheduled and locate it in the Events List.

2. To view the videoconference's Event Details, click its entry in the Events List.

3. To start the call, click 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.
   - Only after you connect will the other participant(s) be allowed into the videoconference and then connected the Welcome image will be replaced by a video image.

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 22.

6. The videoconference controls are the standard ones, as described in the user guide Using the Video Window.
Connecting as a Host Using the Host URL  
- via OTNhub & a Web Browser

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

1. Using the Calendar, navigate to the date on which the videoconference is scheduled and locate it in the Events List.
2. To view the videoconference's Event Details, click its entry in the Events List.
3. You will need the Host Pin for step #7. 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. A Welcome to OTN screen appears briefly followed by an OTN Log In screen.
5. In the OTN Log In screen, type your name in the Name field and then click CONNECT. (The name you enter appears in the Participants list.) A Select your camera and microphone panel appears with your default devices selected.
6. Leave the default devices selected or change as desired and then click START. A PIN pop-up* appears.
7. Paste (Ctrl+V) the Host PIN you earlier copied from the Event Details (step #3) into the PIN field and then click CONNECT.
8. When connected, a video window appears.
   • When you initially enter the conference, you will see a "Welcome" image in the large panel and 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.
   • As host, you have access to additional videoconference controls via the Menu ( ) button at the top left of the video screen. These include:
     • Add a new participant (Do not use; Not applicable with OTNhub)
     • Lock conference
     • Mute all guests
     • Disconnect all participants
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 21.

* The PIN pop-up’s appearance depends on how many PINs the event requires.
  • If the event requires both a Host PIN and Guest PIN, a simple PIN pop-up appears with just the PIN field. Enter the Host PIN.
  • If the event requires only a Host PIN, the PIN pop-up contains both “Select your role” radio buttons and a PIN field. Leave the role “Host” selected and enter the Host PIN.
Connecting as a Host Using the Host URL
- via a Mobile Device

**Note:** You must have the **Pexip Infinity Connect** app (iOS, Android) installed on your mobile device before accessing the Host URL.

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 the email with the Host URL and Host PIN and tap the Host URL.
   A **Welcome to eVisit** screen appears.

2. Click **Open my eVisit event**.
   A **Pexip** screen appears and a couple of permission pop-ups.

3. Tap **OK** to permit access to your camera and calendar.
   A Pexip app “You’re invited to” video screen appears with your self-view and three options.

4. Type your name in the **Name** field.

5. Tap the **Video** option.
   A **PIN** dialog box appears.

6. Type the **Host PIN** and then tap **Join**.

7. 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.

8. To end the conference:
   i.) Tap anywhere in the video image to view the control bar and then tap the **End Call** icon ( ).
   ii.) Click **Disconnect** in the confirmation pop-up.
   iii.) Tap your device’s Home button to exit the app.
Joining as a Host Using an eMail Invitation When Event Requires Both a Guest PIN and a Host PIN

An event’s OTNinvite email contains a link for joining the videoconference. To join as the “host”, you need the Host PIN.

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

1. Open the event’s email invitation and click **Start eVisit**. (Note: Your browser must be set to allow pop-ups.)
   An OTN Log In screen appears.
2. In the OTN Log In screen, type your name in the Name field and then click **CONNECT**.
   A Select your camera and microphone panel appears with your default devices selected.
   If you use Internet Explorer, the image inset might show an Adobe Flash Settings pop-up*, select both Allow and Remember and then click **Close** in the pop-up.
3. Leave the default devices selected or change as desired and then click **START**.
4. A PIN code pop-up appears. Type the Host PIN and then click **CONNECT**.
5. 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 videoconference and when they’re connected the Welcome image will be replaced by a video image.
   - As host, you have access to additional videoconference controls via the **Menu ( )** button at the top left of the video screen. These include:
     - Add a new participant (Do not use; Not applicable with OTNhub)
     - Lock conference
     - Mute all guests
     - Disconnect all participants
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 21.
7. To end the conference, click the **End Call** button ( ) in the toolbar at the bottom of the video window.

* If you ignore the Adobe Flash Settings, you will successfully connect. However, your audio/video will not be enabled and the Flash pop-up message will appear again in the middle of the video screen, asking for permission to access your camera and microphone.
Joining as a Host Using an eMail Invitation When Event Requires Only a Host PIN

An event’s OTNinvite email contains a link for joining the videoconference. To join as the “host”, you need the Host PIN.

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

1. Open the event’s email invitation and click .
   (Note: Your browser must be set to allow pop-ups.)
   An OTN Log In screen appears.

2. In the OTN Log In screen, type your name in the Name field and then click .
   A Select your camera and microphone panel appears with your default devices selected.
   If you use Internet Explorer, the image inset might show an Adobe Flash Settings pop-up*, select both Allow and Remember and then click .

3. Leave the default devices selected or change as desired and then click .
   A “Waiting for the host...” screen appears.

4. Move your mouse over the video image to view the Controls toolbar. Click the keypad icon .

5. Use the keypad to enter the Host PIN. Wait a few seconds.
   (Click outside the keypad to hide it.)
   A message, “You just became a host” appears, your name appears in the participants list with a “Host” tag underneath, and a “Welcome” screen appears 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.
   - As host, you have access to additional videoconference controls via the Menu button at the top left of the video screen. These include:
     - Add a new participant (Do not use; Not applicable with OTNhub)
     - Lock conference
     - Mute all guests
     - Disconnect all participants

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 21.

7. To end the conference, click the End Call button in the toolbar at the bottom of the video window.

* If you ignore the Adobe Flash Settings, you will successfully connect. However, your audio/video will not be enabled and the Flash pop-up message will appear again in the middle of the video screen, asking for permission to access your camera and microphone.
Joining a Videoconference as a Delegate/Guest

As a delegate, you can join an OTNinvite videoconference 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](#).
   (Note: Your browser must be set to allow pop-ups.)
   An **OTN Log In** screen appears.

2. In the **OTN Log In** screen, type your name in the **Name** field and then click [CONNECT](#).
   A **Select your camera and microphone** panel appears with your default devices selected.

3. Leave the default devices selected or change as desired and then click [START](#).
   If no guest PIN is required, skip to step #5.

4. If a guest PIN is required, a **PIN code** pop-up appears.
   Type the **Guest PIN** identified in the Event Details and then click [CONNECT](#).
   **Note:** This is not the Host PIN. It is the guest’s PIN created by the person who sent the invitation.

5. 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.

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**Figure 41:** Event access screens

**Figure 42:** Guest PIN

**Figure 43:** Video in session
Securing (locking) your videoconference

When you first join your videoconference, it is unlocked.

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

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 22).

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.

2. After you have confirmed who is in the call, to view additional video controls, click the Menu button at the top left of the video screen and click Lock conference in the menu drop-down list.

While the videoconference is locked:

• For both the host and all participants, a lock icon appears with the OTN logo in the top left banner.
• For the host, a lock-keyhole icon appears on the left side of the large video pane.

3. To unlock the videoconference, click the Menu button at the top left of the video screen and click Unlock conference in the menu drop-down list.

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

"If a participant needs to reconnect or join late, you must unlock the videoconference to allow them to join the event."
Updating an Invitation Event

Invited participants are notified only when the date or start time changes. They are not automatically informed when you update the end time or patient number. To notify participants about an update, you can re-send the invitation.

You (the event’s creator) or your delegates can update a future-scheduled eVisit Invitation 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 OTN and the Ministry of Health and Long Term Care.)

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

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

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

3. To view the event details, click the event listing. The Event Details panel appears.

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

5. Select or type the new value and click Submit.

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

   If you changed the End Time or Patient number, no confirmation appears and no notification is sent. To notify participants about either of these changes, re-send the invitation.

The Event Details refreshes and appears with the new information.
Copying an Invitation Event

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

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

1. Using the Calendar panel, navigate to the date on which the videoconference is scheduled and locate its entry in the Events List.
2. To view the event details, click its Events List entry. The Event Details panel appears.
3. To create the new event, click Copy Event. A Copy Event pop-up appears containing information from the original event.
4. Review the required fields and change as needed: guest name, guest email, host PIN and guest PIN if desired, and the event settings (event type, title, etc.). If you want to invite additional participants, click Add guest for each additional person and provide their name and email address. (Maximum participants: Clinical 8; Non-clinical 20) For details, see Field Descriptions on page 5.
5. Click Schedule & Send Invite or Start Now & Send Invite. If you are starting now, skip to step #7.
6. If you are scheduling a future event, a Schedule pop-up appears. Select the desired Date, Start time, and End time and then click Schedule. A confirmation pop-up appears.
7. Review the confirmation details.
   i.) 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...” checkbox selected.
   ii.) If all is correct, click Schedule or Create. If you need to change something, click Cancel.

For descriptions of what happens next, see Start Now & Send Invite on page 7, or Schedule & Send Invite on page 8.

* Events created in Ncompass can be copied or modified only in Ncompass.
Re-sending an Invitation

You (the event’s creator) or your delegates can re-send an eVisit Invitation event.

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

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

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

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

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

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

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

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

6. To confirm the re-sending, click Yes. 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 you are a delegate re-sending on behalf of the host, you will not receive a copy of the email.

   • A success message appears.
Cancelling an Invitation Event

You (the event’s creator) or your delegates can cancel an eVisit Invitation event.
You can cancel a future-scheduled videoconference that you previously created via an invitation.
You cannot cancel a videoconference after you have connected to it or completed it on the scheduled date.

1. If you are not already logged in to the OTNhub, open a browser window, sign in at otnhub.ca and access the Videoconference service.
2. Using the Calendar panel, navigate to the date on which the videoconference is scheduled and locate its event listing.
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.
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 you are a delegate cancelling on behalf of the host, you will not receive a copy of the email.