DENTALXPAND LEARNING CENTER / WORK HUB

Schedule and Manage Meetings

A complete guide to access, calendar and list views, scheduling, participants, RSVP, notifications, recurring meetings, organizer actions, join links, live video or audio, recording safeguards, tenant boundaries, troubleshooting, and verification.

VERSION	1.0	AUDIENCE	Authorized meeting users and organizers
FORMAT	Website + PDF	UPDATED	July 2026

Every person, organization, provider, patient, meeting, participant, date, status, and count shown in this guide is fictional. Never use live patient, provider, employee, credential, password, token, recording, or unredacted third-party data in training material.

Contents

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How to use this guide
Read access, tenant context, and meeting-record rules first. Then practice calendar and list views, scheduling, participants, RSVP, organizer actions, joining, recording safeguards, boundaries, troubleshooting, and completion verification.

01 / PURPOSE

Use Meetings to organize authorized conversations

Purpose	What it means
Schedule	Create a meeting with safe purpose, date, start and end time, type, organizer, and selected participants
Coordinate	Use Calendar and List views, search, filters, quick filters, statuses, and RSVP state to locate current authorized meeting records
Connect	Join scheduled or in-progress video or audio meetings using the current session and live-room authorization
Close	Use organizer-owned edit, cancellation, and end behavior with the correct operational follow-up

Meetings are not the source record
Confirm payer, patient, provider, claims, credentialing, task, financial, clinical, and compliance outcomes in their owning module after the conversation.

02 / ACCESS

Confirm page access, organization, and role behavior

Context	Current behavior	Boundary
Authorized page user	Can open the protected workspace when granted pages:meetings.	Organization, practice, API, and RLS determine returned rows.
Organizer	Sees edit and cancel actions for meetings they organize.	UI ownership is not backend mutation authorization.
Participant	Can RSVP while invited and can see Join for scheduled/in-progress cards.	Current membership and live-room checks still apply.
Super Admin	Can see the current local recording control in the live overlay.	Consent, policy, device permission, and scope still apply.

> Confirm workspace first
> A visible card, button, notification, or copied URL is not a security boundary. Verify signed-in account, organization, practice, role, API authorization, and tenant-aware row policy before acting.

Review roles and permissions | Review organization and practice context

03 / MEETING RECORD

Understand types, statuses, ownership, and RSVP

Field or state	Current use	Correct response
Title and description	Operational purpose and safe context	Keep detail minimal and point to the authorized source workflow.
Type	Video, audio, or in person	Choose intended participation mode before invitation.
Scheduled	Future or ready-to-join meeting	Confirm date, time, organizer, and status before joining.
In progress	Active live meeting	Use a current authorized card or link.
Completed/cancelled	No longer an active session	Record legitimate follow-up in the owning workflow.
Organizer/host	Organizer is added as accepted host on creation	Use organizer controls only for owned meetings.
Participant RSVP	Invited, accepted, or declined state	Respond to the current invitation, not an old calendar event.

04 / COMMAND CENTER

Use the Meetings command center

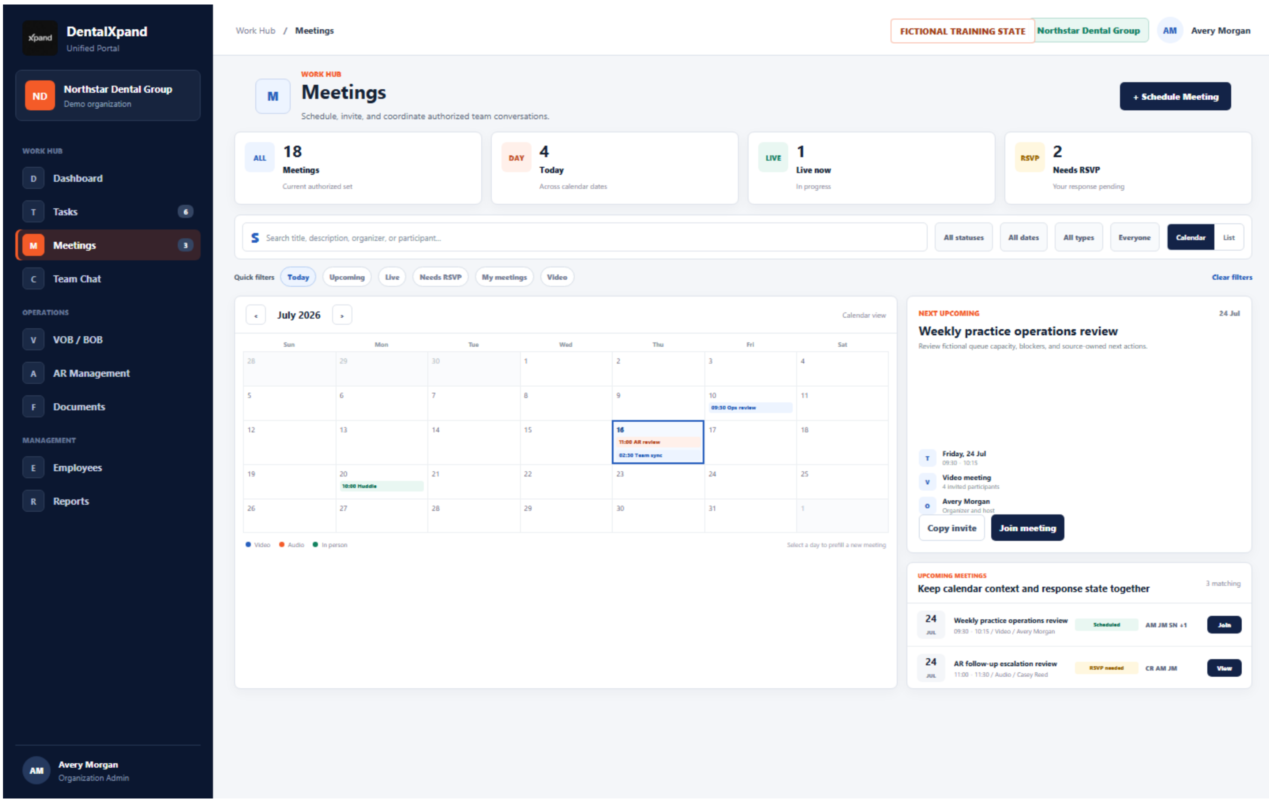

Figure 1. Fictional Meetings command center with metrics, search, filters, Calendar view, upcoming meeting detail, participant state, and Join actions.

1. Confirm account, organization, and practice context.
2. Use metrics only as orientation, not as the source record.
3. Search and filter the authorized meeting set.
4. Open the selected card and confirm title, time, type, organizer, participant state, and status.
5. Use RSVP, Join, edit, or cancellation only when current context allows it.

05 / FIND AND FILTER

Search, filter, and review the current set

Control	Current behavior	Before escalating
Search	Checks title, description, status, type, organizer name/email, and participant names	Clear spelling, title shortcuts, and participant names
Status	All, scheduled, in progress, completed, cancelled	Clear status while searching for closed meetings
Time	All, today, upcoming, past	Check calendar day and local time expectation
Type	Video, audio, in person	Remove type filtering if meeting mode is uncertain
Relationship	Everyone, mine, hosting, invited, accepted	Confirm current organizer/participant membership
Quick filters	Today, upcoming, live, needs RSVP, my meetings, video	Clear active quick filters before reporting missing

Presentation is not entitlement

Search and filters change presentation of already returned rows. They do not grant organizer control, participant membership, API access, or records outside the authorized tenant scope.

06 / VIEWS

Use Calendar and List views on one authorized set

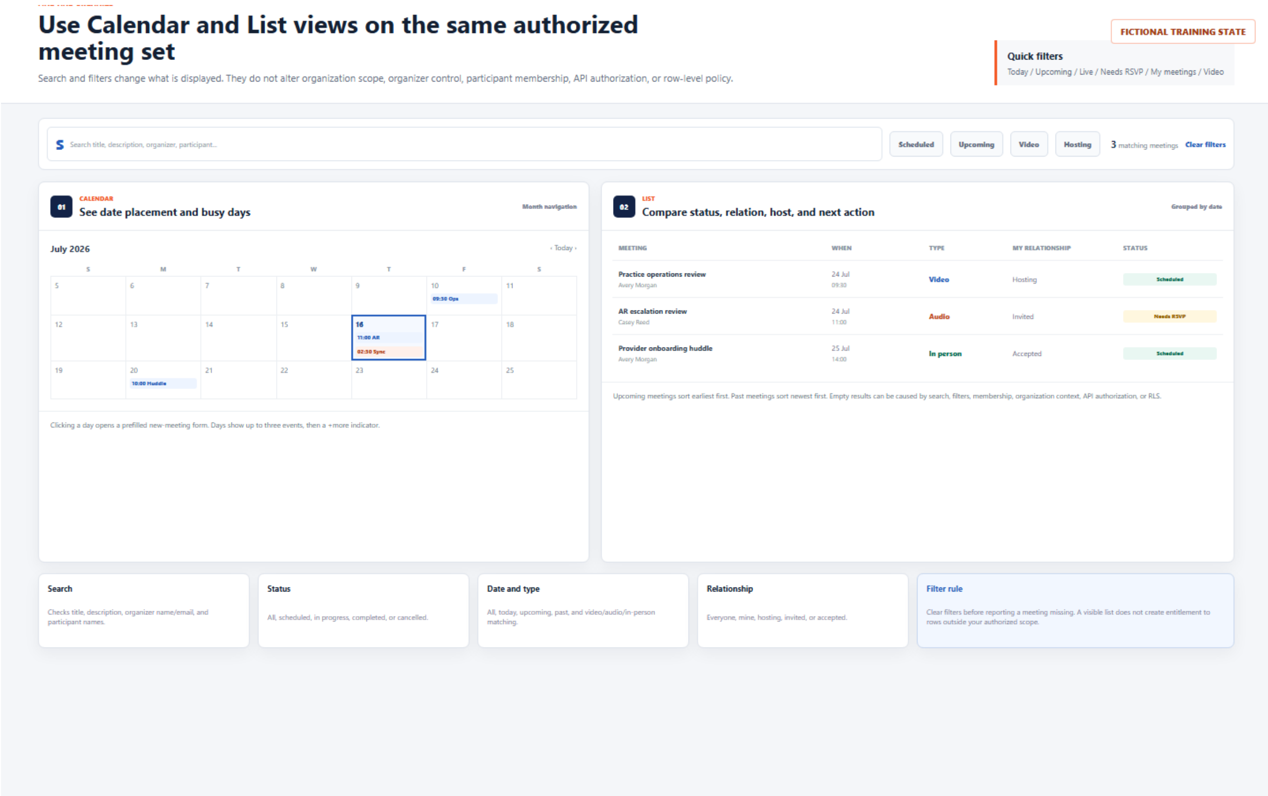

Figure 2. Fictional Calendar and List views showing date placement, filtering, types, organizer relationship, RSVP state, and status.

View	Best for	Important rule
Calendar	Date placement, busy days, and opening a prefilled date for a new meeting	Days show up to three items then +more.
List	Comparing title, time, type, organizer relationship, RSVP, and status	Upcoming sorts earliest first; past sorts newest first.
Filters	Narrowing the authorized result set	Clear filters before reporting a meeting missing.

07 / SCHEDULE

Create a meeting with a clear date, type, host, and list

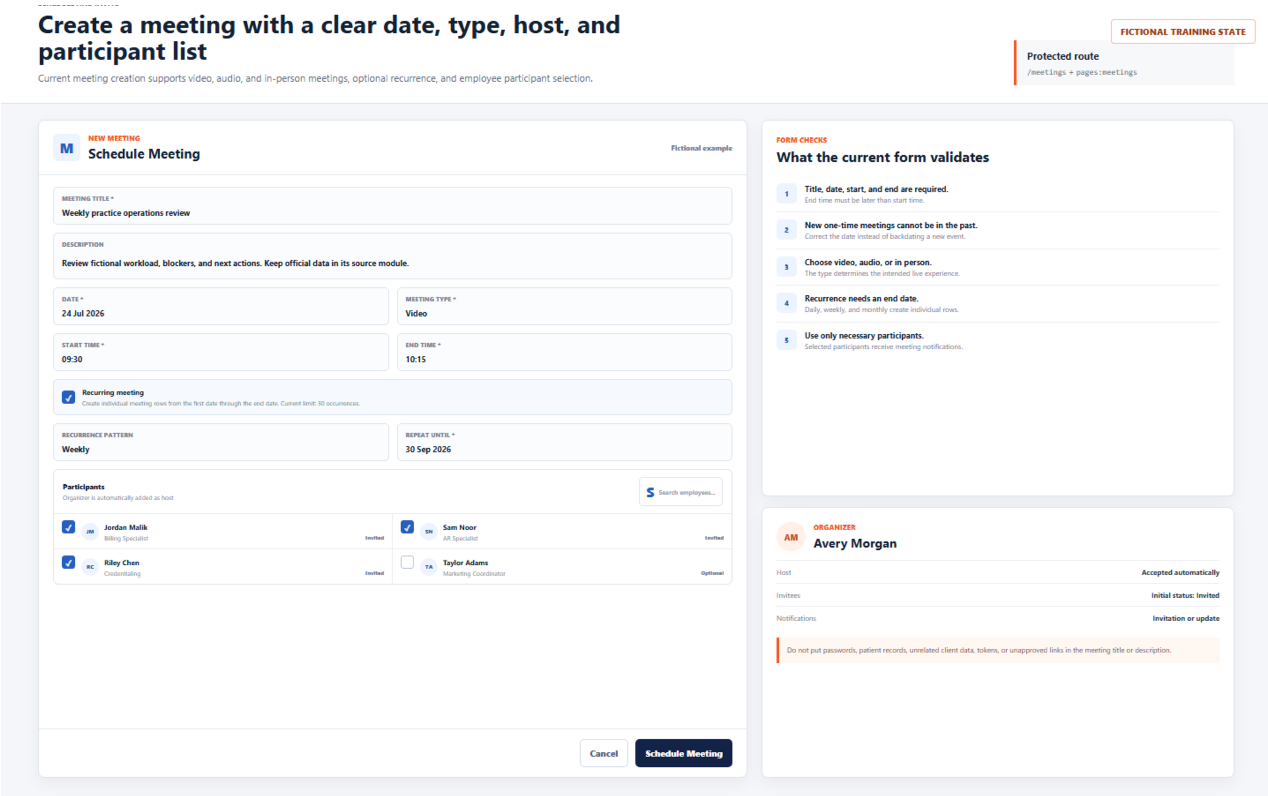

Figure 3. Fictional Schedule Meeting form with title, description, date, type, start/end times, recurrence, participants, organizer host, and validation checks.

1. Use a short operational title without patient, credential, token, or unrelated tenant data.
2. Add minimal description and point to the authorized source record rather than copying confidential content.
3. Enter date, start time, and end time. End must be later than start.
4. Choose video, audio, or in person before inviting people.
5. Select only necessary participants. Organizer is added as accepted host; invitees start invited.
6. Save, then reopen the current card and verify title, date, time, type, participants, and status.

> No new one-time past meetings
> The current form prevents a newly created non-recurring meeting from being in the past. Correct the plan or use the owning workflow instead of manufacturing historical meeting evidence.

08 / PARTICIPANTS

Invite participants and understand host behavior

Behavior	Current result	Operator rule
Organizer	Added as host with accepted status during creation	Confirm the organizer identity before saving.
Selected employee	Added as invited participant and can receive invitation notification	Invite only necessary people.
Update	Selected participants can receive a meeting-updated notification	Recheck attendee list after meaningful edit.
Removal	Meeting update replaces participant membership through the API workflow	Do not assume an old notice or copied link keeps access valid.

Participant choice affects exposure

Use the narrowest useful attendee list. Do not add someone just because they may be interested, and do not use invitations to share data from another client, practice, provider, patient, employee, or tenant.

09 / RECURRENCE

Create recurring meetings carefully

When recurrence is enabled, choose Daily, Weekly, or Monthly and enter an end date no earlier than the start date. The current implementation creates individual meeting rows for each occurrence from the first date through the recurrence end date, up to 30 occurrences.

Step	Correct action
Before save	Confirm purpose, participants, time expectations, first occurrence, recurrence pattern, and end date.
After save	Verify the first, a middle, and the final occurrence in Calendar or List.
Edit	Review the specific current record and selected participants; do not assume a hidden series edit model.
Cancel	Cancel only the intended record and use the approved replacement or follow-up workflow when necessary.

Check real rows
Current recurring creation saves multiple individual meeting rows. Validate resulting dates and invitees instead of relying on a calendar assumption.

10 / NOTIFICATIONS

Use invitations, updates, and cancellations as alerts

Notification	What it indicates	Next action
Meeting Invitation	Selected as a participant for a scheduled meeting	Open the current record and RSVP if still invited.
Meeting Updated	Organizer saved a change for selected participants	Recheck date, time, type, organizer, and participant state.
Meeting Cancelled	Current deletion workflow removed meeting and participant rows	Do not join from an old link; confirm a replacement if needed.

Notification is not source of truth

Missing, delayed, or duplicate alerts should be investigated with the current meeting record, saved participant identity, and safe error details. Do not make attendance decisions from an alert alone.

11 / RSVP

Accept or decline from current invitation state

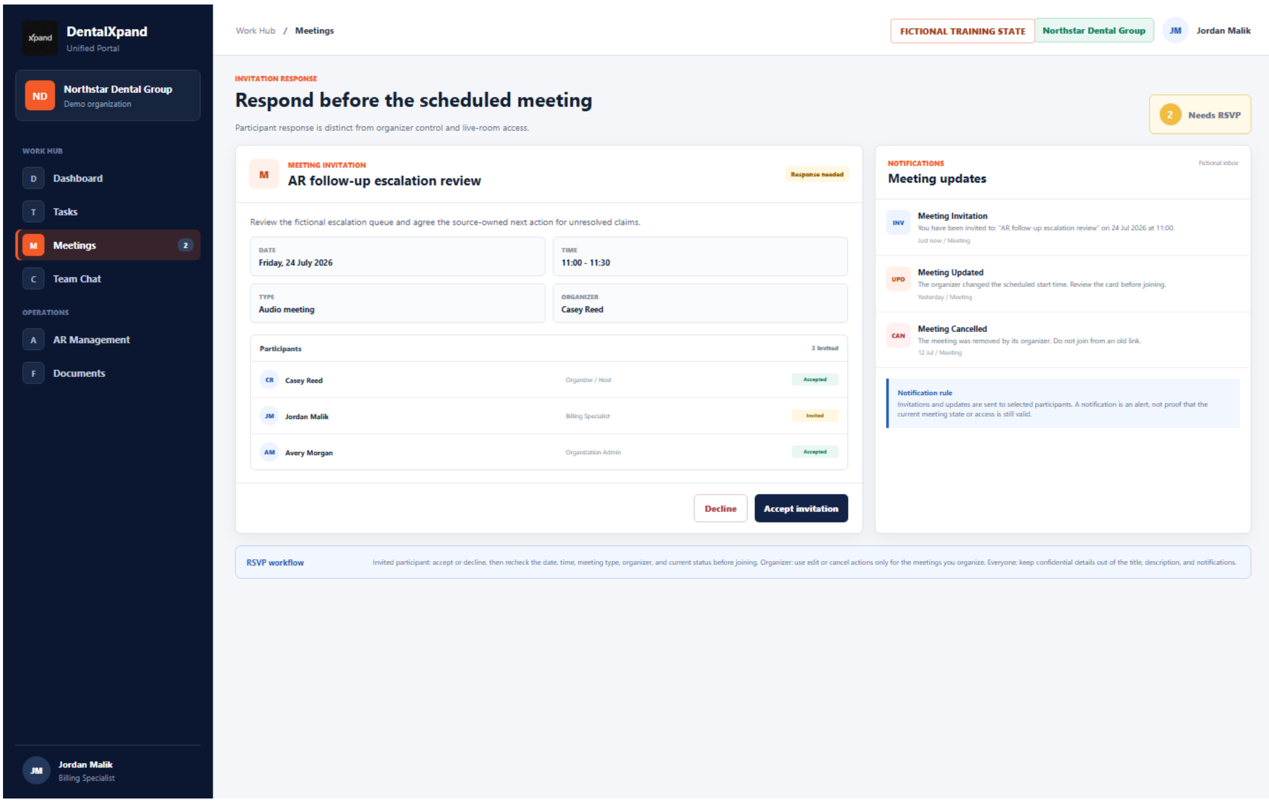

Figure 4. Fictional invitation view with meeting details, participants, response actions, and meeting notification examples.

1. Open the invitation and verify organization, title, date, time, type, organizer, and participants.
2. Use Accept or Decline only while the current participant state is invited.
3. Recheck current status and participant list before joining later.
4. Do not treat RSVP as permission to edit or cancel another organizer's meeting.

12 / ORGANIZER ACTIONS

Edit, cancel, and complete organizer-owned meetings

Action	Current behavior	Before using it
Edit	Organizer can open current title, times, type, recurrence, and participants	Confirm correct occurrence; review participants and notices after saving.
Cancel	Current UI calls delete workflow, removes participant rows, then attempts cancellation notices	Confirm cancellation instead of completion or rescheduling.
Join	Joining updates meeting to in progress before opening overlay, subject to API result	Use current eligible scheduled/in-progress meeting only.
End call	Organizer end handler marks active meeting completed and closes overlay	Make sure the intended meeting is ending and follow-up is recorded elsewhere.

Cancellation is not cleanup
The current cancellation path removes the meeting and participants. Use it deliberately and leave the appropriate source-owned replacement or follow-up, if one exists.

13 / JOIN LINKS

Join from a current card or link without treating URL as access

Meeting cards can show Join for scheduled and in-progress meetings. The live overlay can copy a join URL such as `/meetings/join/<meeting-id>`. The application also recognizes a desktop deep link such as `dentalxpand://meetings/join/<meeting-id>`.

1. Start with the current meeting card where possible and verify title, organizer, time, and status.
2. Use the current signed-in account. Never borrow another person's session or credentials.
3. Copy the link only to a legitimate participant and only through the approved communication path.
4. Treat join failure as a signal to verify session, membership, meeting state, API, RLS, or live-service setup. Do not bypass it.

> Link is not credential
> A copied URL must not bypass sign-in, tenant context, participant or organizer membership, API authorization, RLS, or live-room token checks.

14 / LIVE MEETING

Use video and audio meetings safely

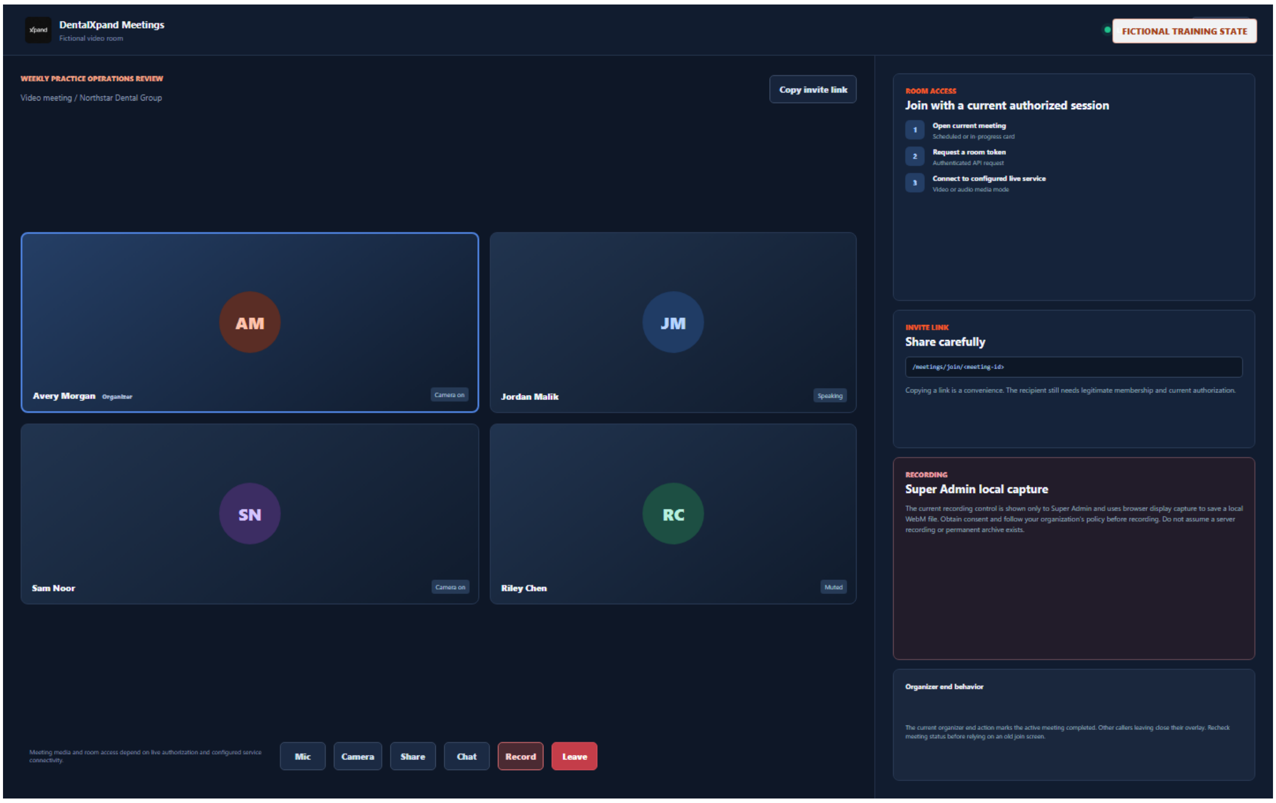

Figure 5. Fictional live video room with participant tiles, invitation copy, room authorization flow, meeting controls, recording disclosure, and organizer end behavior.

Element	Current behavior	Safe use
Room token	Overlay requests a token from configured application API using current session	Do not expose tokens or session details.
Video/audio	Video enabled for video meetings; audio enabled for live connection	Use approved device permissions and protect shared information.
Invite link	Overlay can copy current join route and meeting detail	Share only with legitimate recipients.
Minimize/leave	Overlay provides a minimized state and leave/end path	Recheck meeting status after leaving.

15 / RECORDING

Understand current Super Admin local capture

The current live overlay conditionally shows recording to a Super Admin user. It uses browser display capture and MediaRecorder to download a local WebM file after device permission. It is not presented as a server-side archive, permanent record, or general participant recording feature.

Area	Current limitation	Required discipline
Visibility	Only conditionally shown to Super Admin	Control visibility does not automatically authorize every recording.
Permission	Browser/OS display capture can be denied	Do not bypass with another person's device or account.
Output	Local WebM download	Use approved storage, retention, and deletion process.
Consent	Not solved by technical control	Obtain required consent and follow policy and law before recording.

Never record by default
Do not record passwords, protected information, unrelated applications, personal communications, or anyone not authorized to be present. Close unrelated content before screen sharing or capture.

16 / REALTIME

Use refresh and realtime as a freshness aid

The Meetings page fetches meetings and employees, then subscribes to changes in meetings and meeting participants. Realtime helps refresh visible state when relevant records change. It does not replace source verification, access control, tenant policy, or intentional refresh.

1. Recheck the card after a change to confirm status, time, organizer, and participants.
2. Clear filters and check calendar range before escalating a missing meeting.
3. Verify saved state after a notification rather than relying on alert text.
4. When live action fails, preserve only safe error context for support and never send tokens or protected data.

17 / FOLLOW-UP

Move decisions into the owning workflow

The current Meetings page focuses on scheduling, participants, RSVP, live connection, and meeting state. It does not include a formal agenda, minutes, attachment, decision-log, or task-creation editor in the current meetings page. Keep post-meeting work in the appropriate authorized source workflow.

Outcome	Correct destination
Operational action	Create or update an authorized task with owner, due date, safe description, and source context.
Patient/payer/provider result	Use the proper patient, payer, claim, verification, AR, credentialing, or owning module.
Team discussion	Use the approved authorized message channel when saved discussion is needed.
Another conversation	Schedule a new meeting only when needed; do not keep cancelled/completed meetings as placeholders.

Continue to Tasks | Continue to Team Messages

18 / BOUNDARIES

Respect tenant, participant, API, and live-room controls

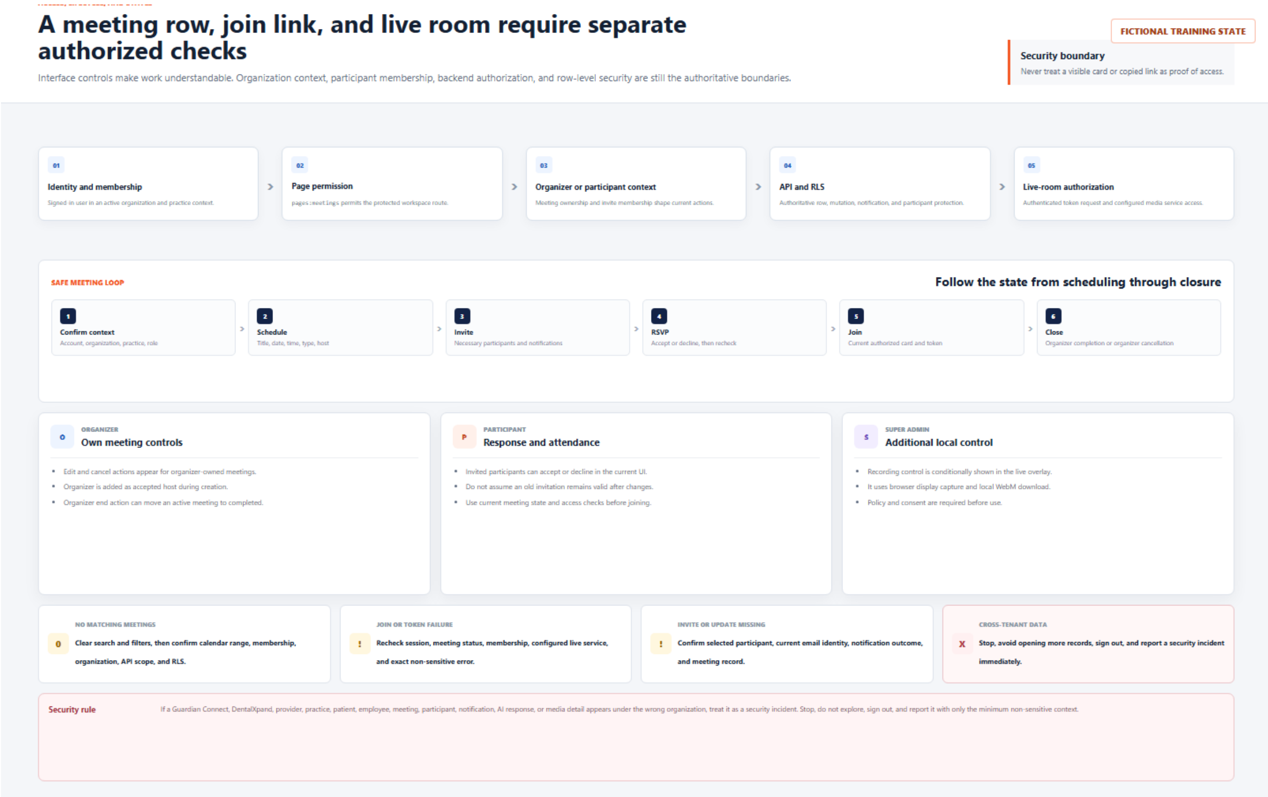

Figure 6. Fictional meeting authorization flow, lifecycle, organizer/participant/Super Admin behavior, troubleshooting states, and cross-tenant incident response.

Boundary	What must be true
Identity	Named user has active membership in expected organization and practice context.
Page	pages:meetings permits protected workspace route.
Meeting context	Current organizer or participant membership matches valid action.
API/RLS	Authoritative create, update, participant, notification, and row protection succeed.
Live room	Current authenticated room token and configured media connection are authorized.

Cross-tenant data is an incident
If Guardian Connect, DentalXpand, provider, practice, patient, employee, meeting, participant, notification, recording, AI response, or media detail appears in the wrong tenant: stop, avoid opening more, sign out, and report immediately with minimum non-sensitive context.

19 / TROUBLESHOOT

Resolve expected states without bypassing access

What you see	Possible reason	Correct first response
No matching meetings	Filters, calendar range, membership, organization, API scope, or RLS	Clear filters, confirm context, then check current source result.
Cannot schedule/edit	Missing responsibility, UI behavior, backend denial, or RLS	Confirm exact least-privilege need; do not grant broad Admin as shortcut.
Invite/update missing	Participant not selected, identity differs, notification failed, or record changed	Open record and verify saved participants and state.
RSVP missing	Not invited, already responded, or record changed	Check current user, participant, status, and organization.
Join/token failure	Session, membership, status, API authorization, or live service	Recheck current session and eligible state; do not borrow access.
Recording unavailable	Role, display permission, browser, or policy	Confirm consent, policy, role, and approved process.
Other tenant data	Possible isolation failure	Stop, sign out, and report security incident.

20 / COMPLETION

Verify that meeting management is understood

- I can confirm account, organization, practice, role, and pages:meetings before using Meetings.
- I can distinguish page access, organizer behavior, participant RSVP, backend authorization, RLS, and live-room access.
- I can use Calendar, List, search, status, time, type, relationship, and quick filters correctly.
- I can schedule a meeting with a safe title, date, times, type, host, participants, and saved-card verification.
- I understand organizer host behavior, selected participant invitations, updates, and cancellation notices.
- I can create recurrence deliberately and verify resulting individual rows.
- I can RSVP, then recheck the current meeting before joining.
- I know organizer edit, cancellation, join, and end actions change meaningful state.
- I know a copied meeting URL is not a credential.
- I understand the current live room token flow and local Super Admin recording limitation.
- I know to move decisions into Tasks or their owning source workflow.
- I can distinguish empty, denied, notification, token, recording, and cross-tenant states.

> Ready for live communication training
> The next lesson covers video, audio, screen sharing, permissions, and call safeguards in more detail.

21 / CONTINUE

Continue through DentalXpand learning

Tasks guide	Video and audio guide	All resources
Tasks guide	**Video and audio guide**	**All resources**

Related lessons

- Use the Dashboard command center
- Navigate sections and pin frequent tools
- Understand roles, permissions, and access boundaries
- Understand organization and practice context
- Manage tasks, assignments, steps, and timers

Website guide: Schedule and manage meetings
Support: support@xpand.dental
Website: xpand.dental