## Video Chat User Guide

Last Modified on 09/05/2024 10:42 am EDT

Check out our guide on getting started using Video Chat.

## How to Use Updox Video Chat

1. Log in to your Updox account.

updox				
Sign in to your account				
Username				
Enter your username				
Password				
Enter your password				
Sign In				
Forgot Password?				

2. The Video Chat button is located in the menu line of the Updox Inbox. Click the button to initiate a video chat.

🗮 Menu	updox Open L	ive Video Chat	
	> 2 2 5		
$\frown$	> message	Tue 09/19/23 6:02 PM	Reminder Notification Failure
Inbox	> text message	Fri 09/08/23 4:18 PM	SMS Message
	> secure text	Fri 09/08/23 4:17 PM	Secure Text Message
Sent	> text message	Fri 09/08/23 4:17 PM	SMS Message

3. The Video Chat page will open. From this page, you can

- Invite recipients to a Video Chat waiting room
- Invite recipients to participate in a Video Chat session
- View recipients in your Video Chat waiting room
- For more information on the Waiting Room see our overview video and tips and tricks article.

≡ Menu <b>up</b>	xok	Č BW
Video Chat		MY DEVICE 🔯 \vee SETTINGS HELP 🗸
Good mornir	g, Sample Doctor	Add phone call ✓ Add phone call ✓ Send invite ✓
WAITING ROOMS	My Room OPEN Y	
All Rooms James Smith's Wai My Room	There is current Send Ir	ly no one waiting vitations

4. Ensure your device is ready to perform a video call, by clicking on **My Device** located in the top-right of your screen.

- Check to ensure that you have allowed permissions for your audio and video
- Double-check that you have the correct Camera and Microphone selected
- If your Browser or Operating System has an 'X' next to it, please refer to our Updox Technical Guide to view our compatible Browsers and Operating Systems.

Note: Video Chat is not compatible with iOS 11 and below.

	MY DEVICE 🖄	SETTIN	IGS	HELP
		3		
√ Video	off 🕅			Show
FaceTin	ne HD Camera (B6	5DF:451A)		•
Non	e B	lur		Y
				C.
√ Micro	phone On 🖗			Mute
Default	- MacBook Pro M	icrophone (B	uilt-in)	*
	er		с	hrome 11
✓ Brows				
<ul><li>✓ Brows</li><li>✓ Opera</li></ul>	iting System		Mac O	S X 10.15.

Note: Backgrounds do not currently work on mobile devices.

5. Send the invite to your recipient. Click on the blue **Send Invite** button to select who you want to send an invite to. While you type, our system will search through your address book and will populate potential results based on patient name, mobile number, or email address.

o Add phone call	_ <b>`</b>	Send invite
Sand a naw in	vitation	
Select waiting room:	VILATION	
My Room		•
Enter recipient:		
Search or type a	number or emai	l
Search or type a Search the address b email address	number or emai	l number or enter a

6. An invitation to the Video Chat waiting room or session is sent via text or email to a recipient.

- Video Chat invites will remain active for up to 72 hours.
- Once a Video Chat session is started, you may stay connected for up to 4 hours.

Today 1:45 PM
Hello Laurie, join your secure virtual visit <u>https://myupdox.com/</u>
<u>45f819360cff4a1da75683d-</u> f06f59245 from Family Practice at
your appointment time.

7. After sending an invite, you will see real-time updates regarding the status of the video chat invitation including:

- View all waiting room invites with the time sent.
- View if a participant has entered the waiting room after an Updox device test and how long he/she has been in the waiting room.
- Begin your Video Chat with up to 19 participants!
  - You may either select all 19 directly from the waiting room or add additional participants to the call after the call begins!

Video Chat				MY DEVICE $\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!$
Good afterno	oon, Sample Doctor			Send invite     Y
WAITING ROOMS	My Room 1 OPEN 🛩			
All Rooms	Status	Recipient	Room	
James Smith's Wai My Room	Waiting a few seconds □٩ ♥	Laurie Sample DOB: 1990-12-08 (32 years) MRN: SAJA000001	My Room $  imes $	Start 000
	Sent 1 minute ago	<b>Jason Patient</b> DOB: 1990-08-28 (33 years) MRN: PAJA000005	My Room $ \smallsetminus $	→) Enter 000
	Sent 1 minute ago	Sample Patient DOB: 1991-11-05 (31 years) MRN: PASA000011	My Room $ \smallsetminus $	→] Enter 000

8. Important features to know about Video Chat.

- Participants are in a HIPAA-compliant, secure environment.
- The host of the session can:
  - Pause the video and/or audio feed
    - Including the participants' feed
  - Capture screenshots and notes
  - Add/Remove other participants mid-call
  - Send individual participants to the waiting room during a call and readmit them later
  - End the session

Video Chat				MY DEVICE $$
DURATION >				
BETWEEN James Smith				
Host				
Laurie Sample			201	
			251	
NOTES				
Take a note				
0/4000				
SCREENSHOTS 0/10				
Use the (ⓐ) button to capture screenshots.			Sample Doctor	
	$\frown$			
Add participant				Q
6 Add a phone call to this chat	CAPTURE SHARE SCREEN	LAYOUT	SEND BACK TO END WAITING ROOM	MUTE MY A

9. When the conversation is complete, click the End Chat button to see the Chat Summary page. On this page, the date, time, duration, name, and birthdate of the recipient will be displayed.

The summary page acts as documentation of the session. Click to send the summary to the Inbox, where it is saved as a PDF. In the Inbox, you may choose to store it for your records or download it to save to the EHR

Participant List		
James Smith <i>Host</i> 1 chat for 1 minute		
Laurie Sample DOB: 1990-12-08 (32 years)		