

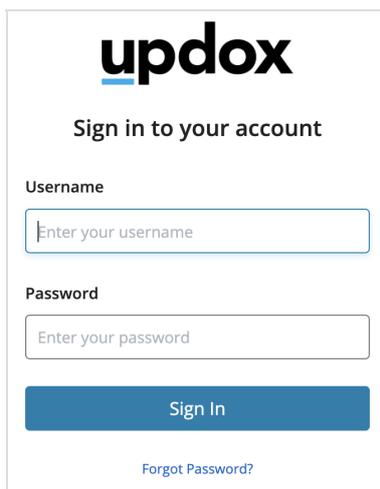
Video Chat User Guide

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

Check out our guide on getting started using Video Chat.

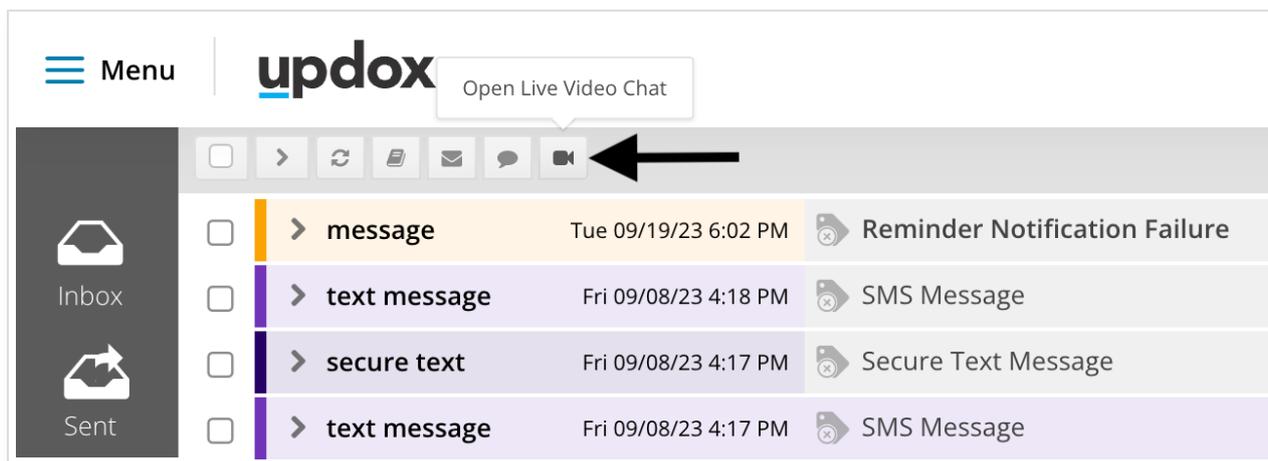
How to Use Updox Video Chat

1. Log in to your Updox account.



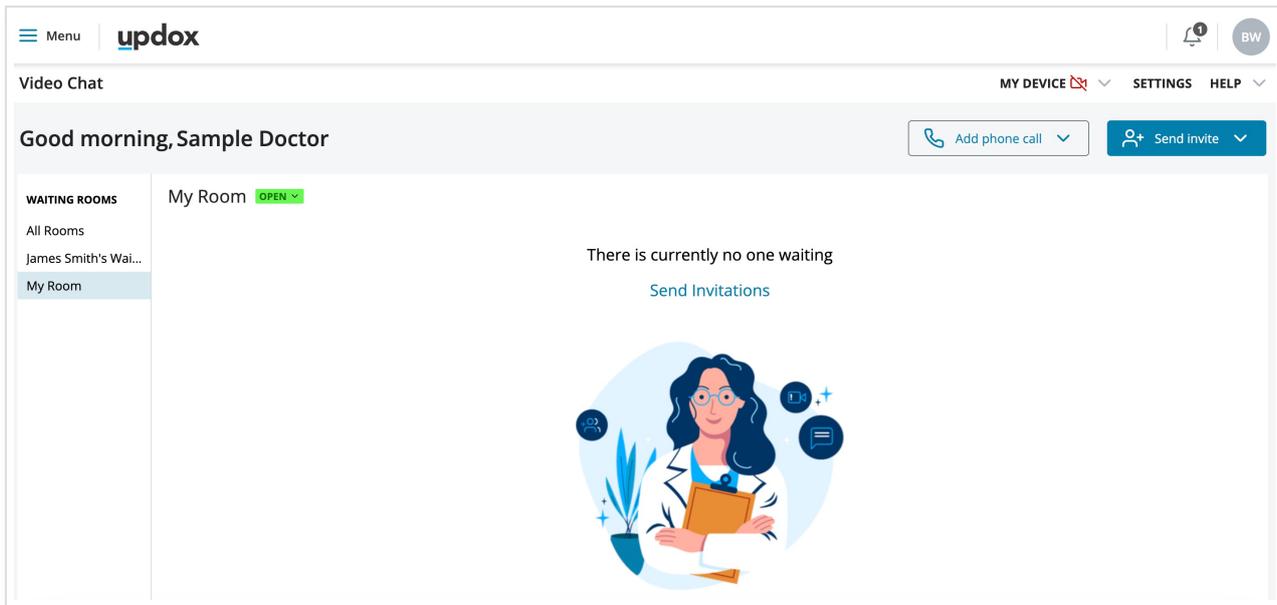
The image shows the Updox login page. At the top is the Updox logo. Below it is the heading "Sign in to your account". There are two input fields: "Username" with the placeholder text "Enter your username" and "Password" with the placeholder text "Enter your password". Below the password field is a blue "Sign In" button. At the bottom of the form is a link that says "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.



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

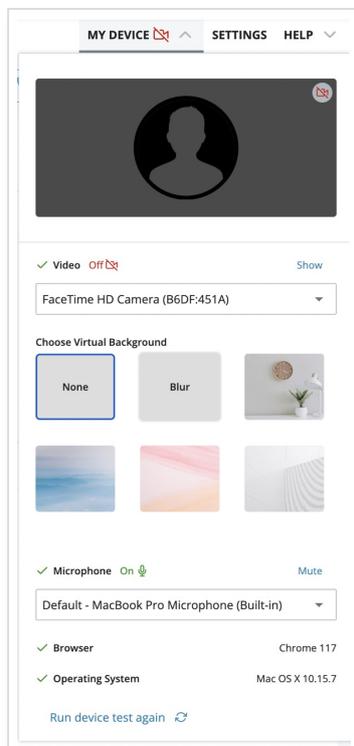
- Invite recipients to a Video Chat waiting room
- Invite recipients to participate in a Video Chat session
- View recipients in your Video Chat waiting room
- For more information on the Waiting Room see our [overview video](#) and [tips and tricks article](#).



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

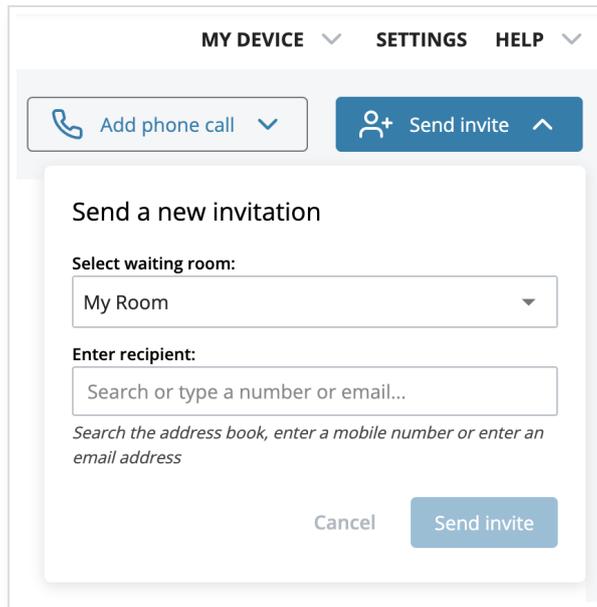
- Check to ensure that you have allowed permissions for your audio and video
- Double-check that you have the correct Camera and Microphone selected
- If your Browser or Operating System has an 'X' next to it, please refer to our [Updox Technical Guide](#) to view our compatible Browsers and Operating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

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



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.



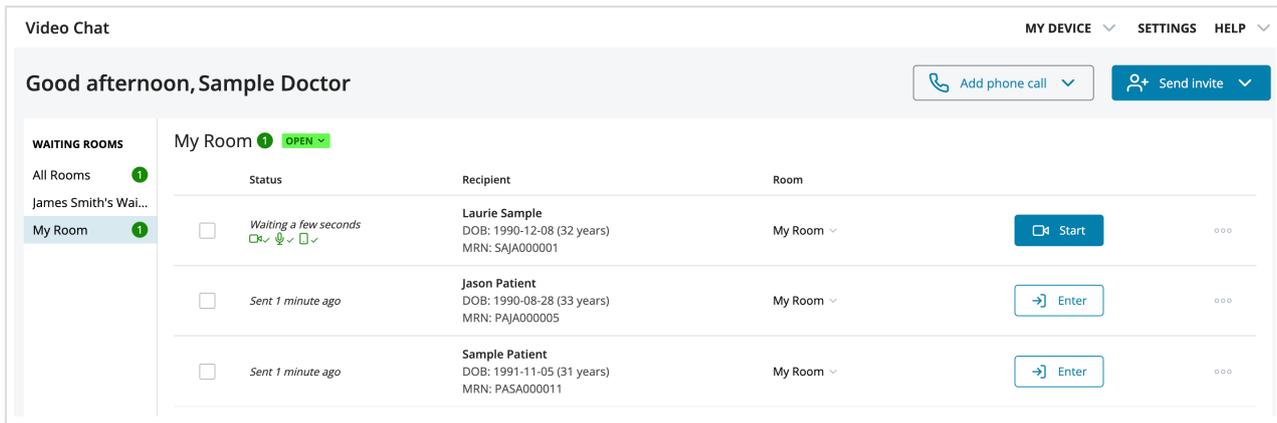
6. An invitation to the Video Chat waiting room or session is sent via text or email to a recipient.

- 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.



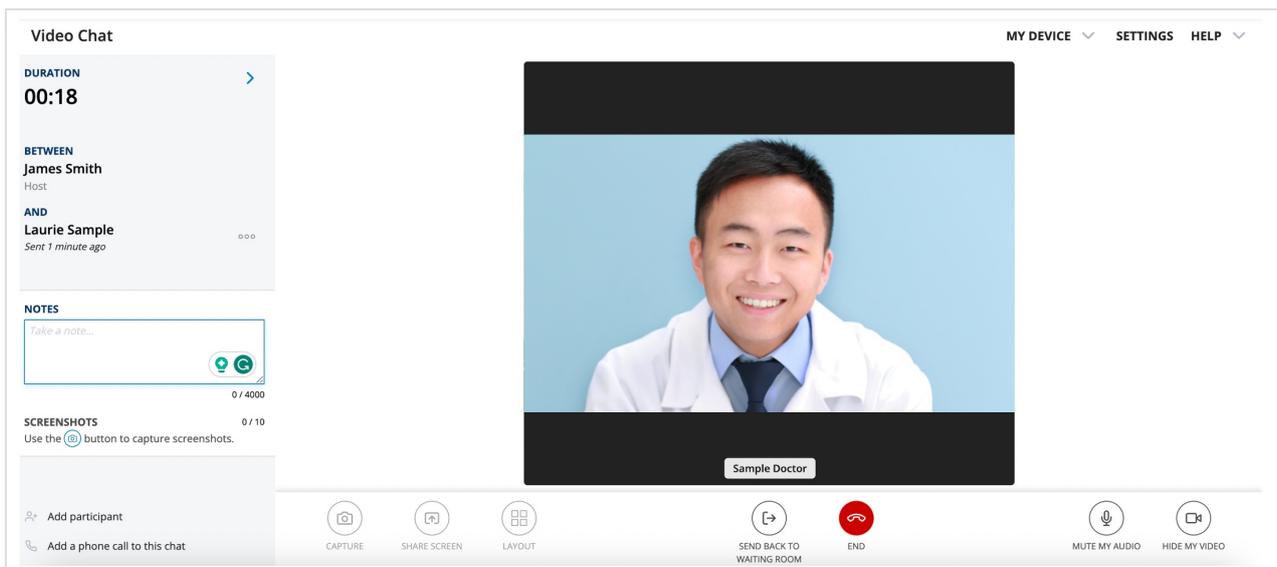
7. After sending an invite, you will see real-time updates regarding the status of the video chat invitation including:

- 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!



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



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

Video Chat Summary

Summary Items

Include all in Inbox Summary

MOST RECENT NOTE

 **James Smith** visit with **Laurie**:
1 minute chat started on 10/02/2023 at 02:12pm

Sample notes go here.  

21 / 4000

1 note will be included in the summary.

Send Summary to Inbox

 Discard Summary

Participant List

James Smith *Host*
1 chat for 1 minute

Laurie Sample
DOB: 1990-12-08 (32 years)