Zoom Workplace Telehealth - Patient Workflow

Subjects:

1. Patient Workflow – Joining a Telehealth Session
2. Download Zoom Workplace

1. Patient Workflow – Joining a Telehealth Session

System Area: Patient's Operating System

Roles Affected: Patients

Overview: Telehealth provides a secure way for providers to communicate with patients remotely so they can provide better care and flexibility.

Patients can access scheduled Telehealth appointments the following ways:

1. Via a computer or mobile device from the link provided in their Telehealth confirmation email.
2. Via a computer or mobile device from the link their provider sends to them.
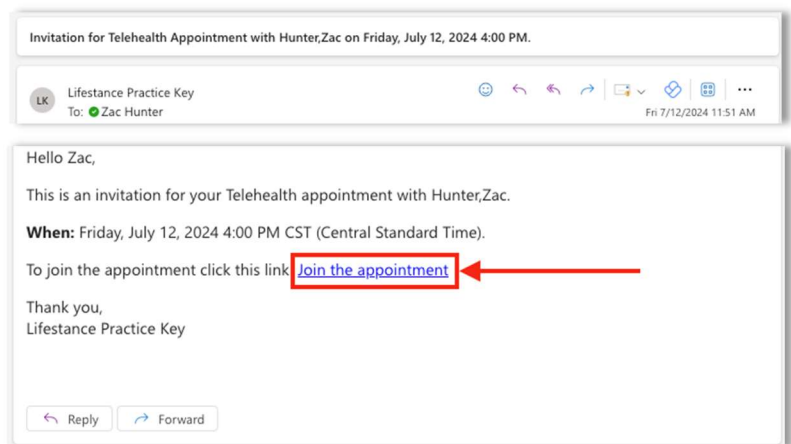3. Via a computer or mobile device from their Patient Portal account.

Workflow:

1. Via a computer or mobile device from the link provided in the **Telehealth Invitation** email.
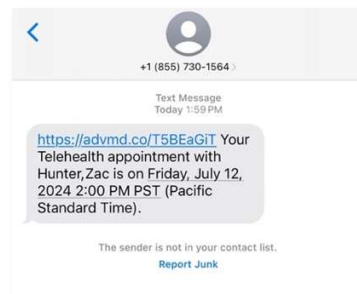
   The invitation will be sent from:
   - *noreply@advancedmd.com*

   Select the **Link** to begin the process of entering the session.

2. Via a computer or mobile device from the link their provider sends by email (see above) or text on-demand.
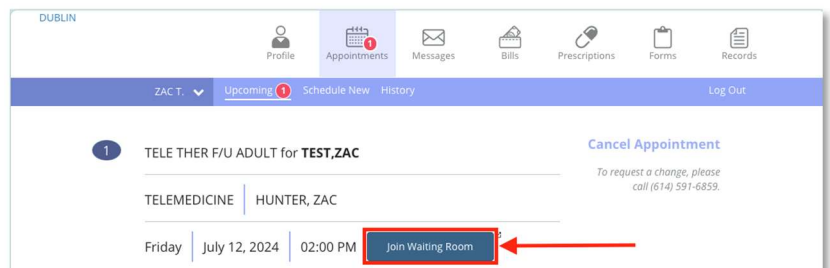
   Select the **Link** to begin the process of entering the session.

3. Via computer or mobile device from their **Patient Portal** account.
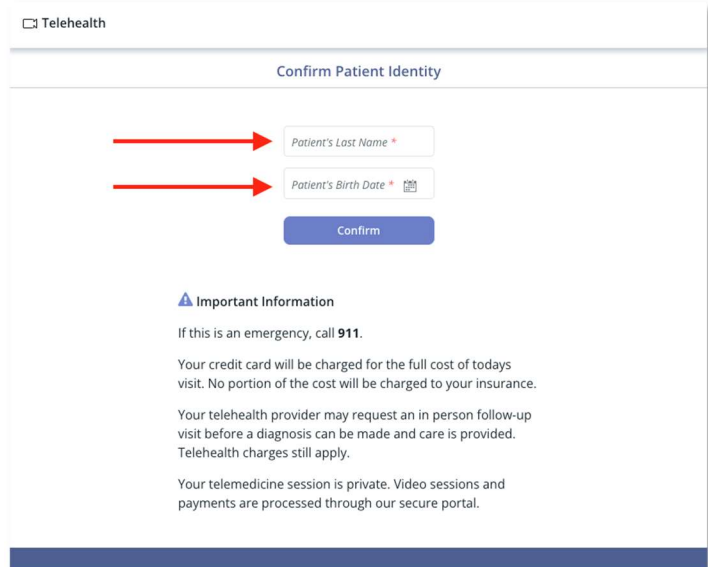
   - Login to the Portal
   - Select "Appointments"
   - Select "Upcoming"

   Select Join **Waiting Room** to begin the process of entering the session.

4. After selecting the **Link** a browser window will open where the user will need to confirm their **Last Name** and **Date of Birth**.

   Select **Confirm** to proceed.

5. The **Terms and Conditions** display, and the user must agree before continuing.

   Select **Accept** to proceed.

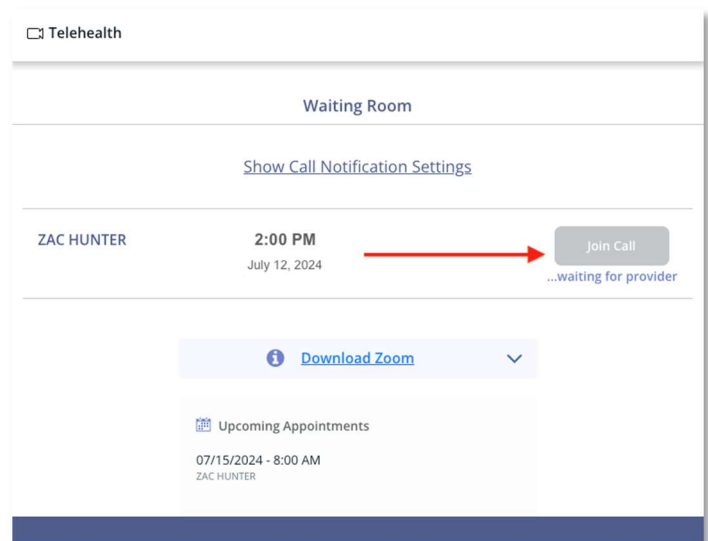6. The user will then be in the provider's **Waiting Room**.

   The **Join Call** button will be grayed out until the Provider begins the call on their end

7. Once the provider starts the call select the **Join Call** button and a new window will open.
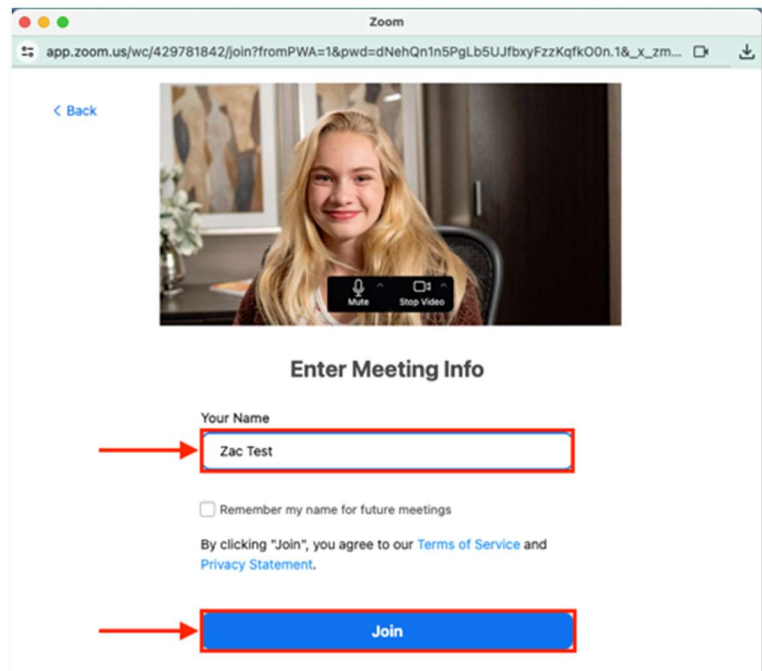
    Select **Launch Meeting.**

    If the user doesn't have **Zoom** installed on their device a **Join from Your Browser** option will display at the bottom of this window after selecting Launch Meeting.
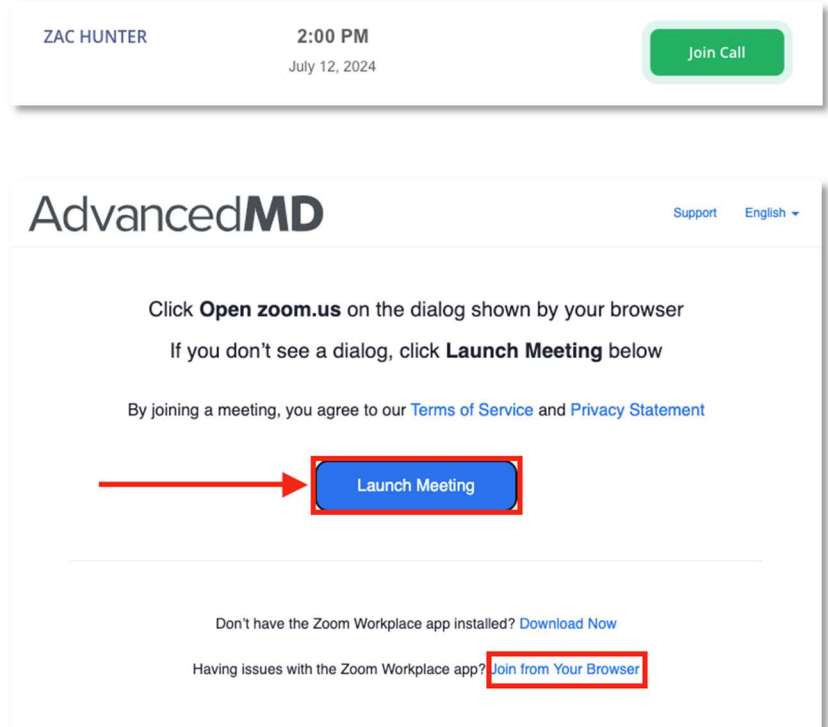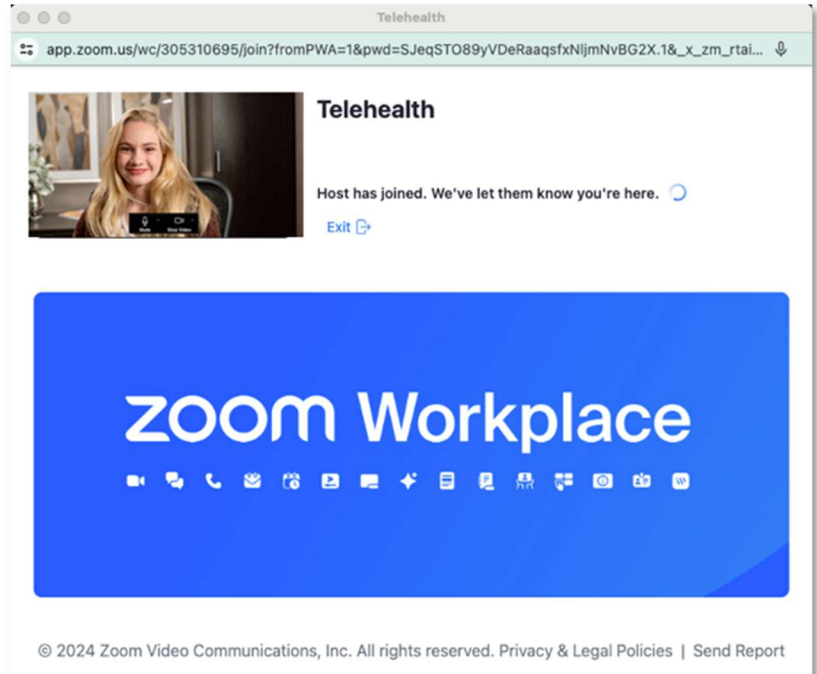

8. Confirm audio and video settings are connected and enter the **Patients Name.**
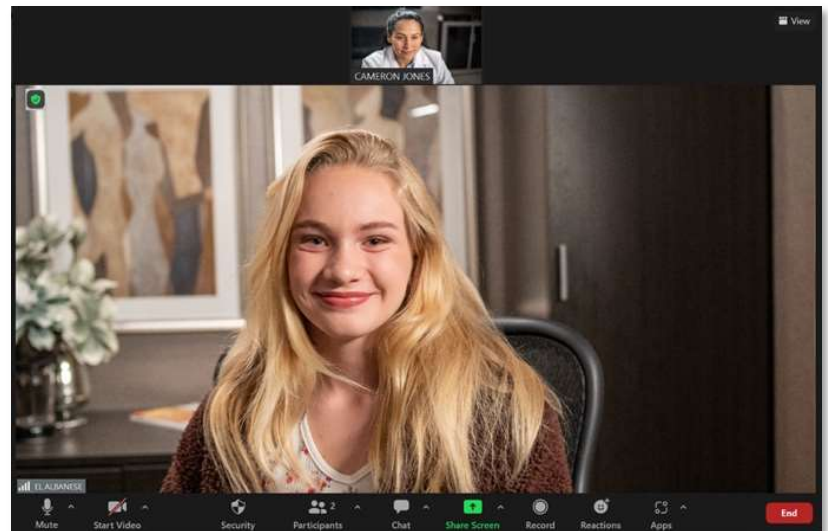
    Select **Join** to open the call window.

9. Once connected to the Session, the provider will be notified that you are waiting to join the call.

10. Once both the user and the provider are connected the **Session** will begin
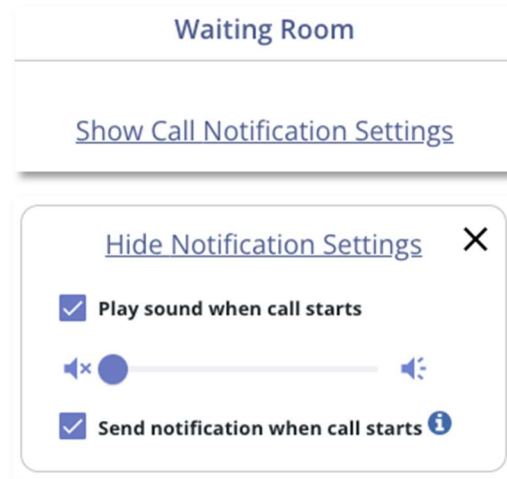
2. Downloading Zoom Workplace

System Area: Patient's Operating System

Roles Affected: Patients

Overview: In the Provider **Telehealth Waiting Room** the user can update their device notification settings, view upcoming appointments and download Zoom Workplace.
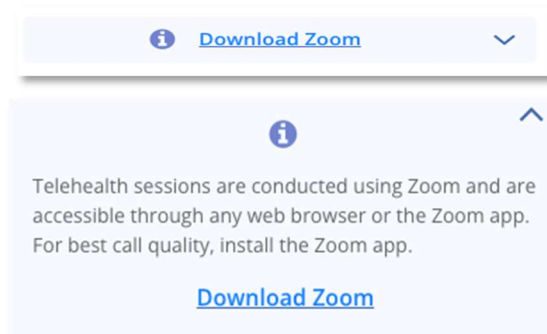
Workflow:

1. While in the **Telehealth Waiting Room** select **Show Call Notification Settings** to expand the notification setting options.
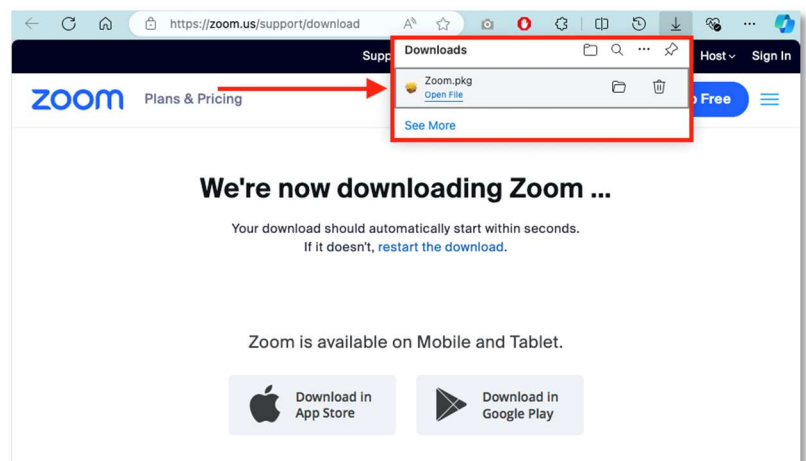
2. While in the **Telehealth Waiting Room i**t's advised to **Download** Zoom Workplace to ensure an optimal connection to the Telehealth Appointment.
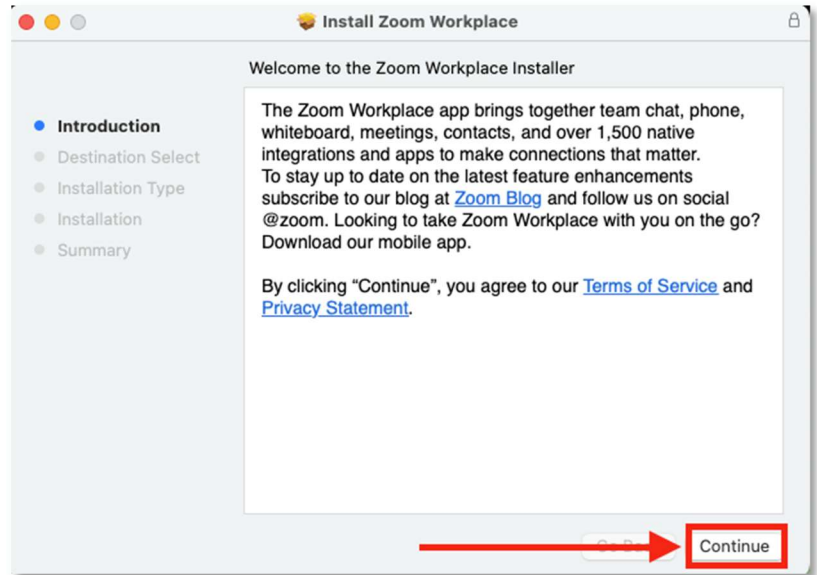
   Select **Download Zoom** to continue.

3. The user will be redirected to Zoom's website where a download will automatically begin.

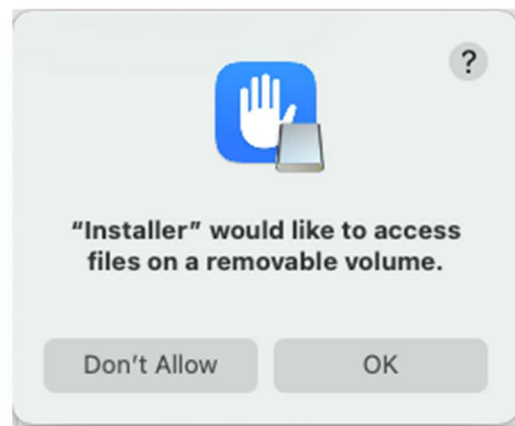   Select **Open File** to begin the installation process.

4. The **Install Zoom Workplace** window will open.

   Select **Continue** and follow the prompts to complete installation.

5. During the installation process **Allow** the installer to access files on a removeable volume.
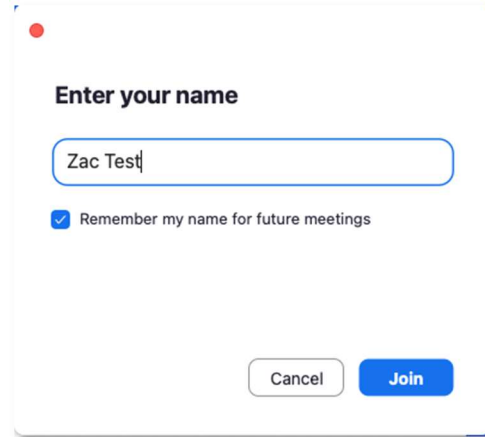

6. Once Zoom is installed navigate back to the browser with the **Waiting Room** open.

   Select **Join Call** to continue. The user will be prompted to open Zoom; you can also check the box to bypass this message in the future.
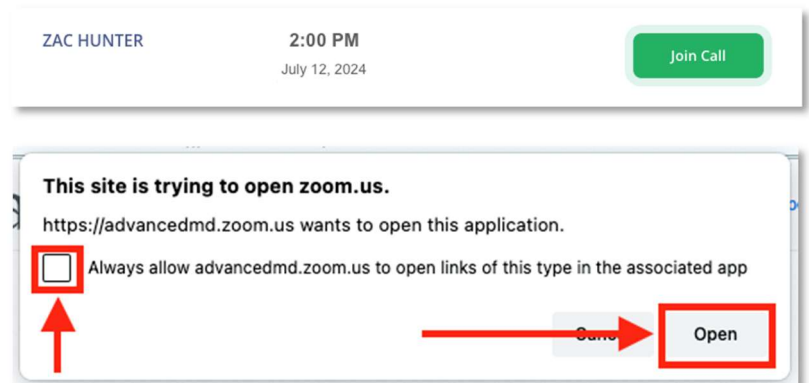
7. A **Zoom** window will open to confirm the user's name.
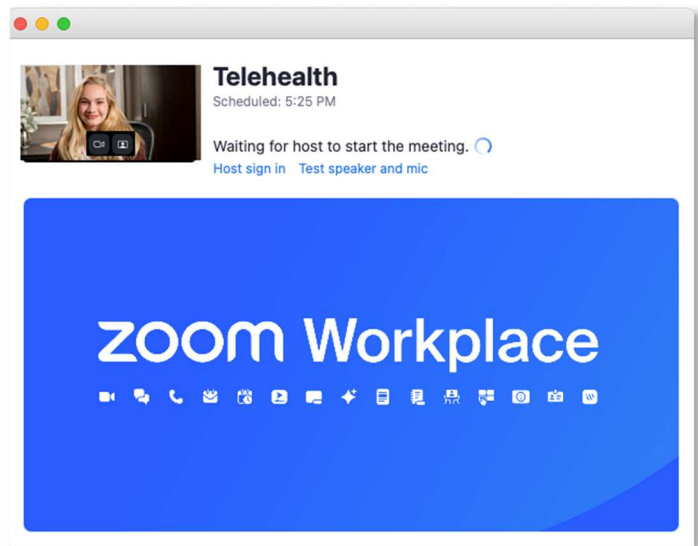
   Select **Join** to continue.

8. A window to confirm the user's audio and video is working correctly will display and the provider will be notified that you are waiting to join the call.

9. Once both the user and the provider are connected the **Session** will begin