

File Transfer to Patients for Ambulatory Providers, Clinical Staff and Clerical Staff

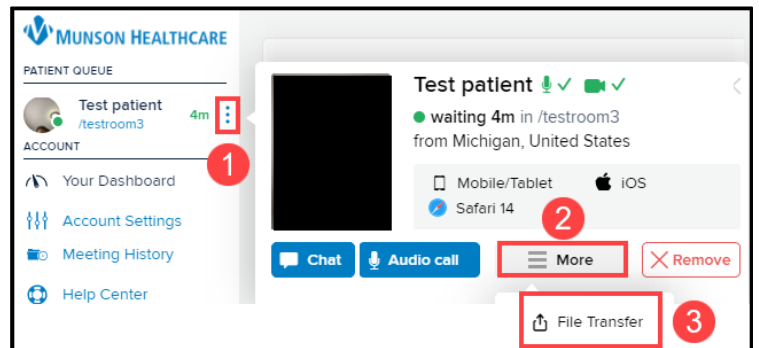
Summary: Implement Doxy.me for video visits along with best practice video visit workflows. The following includes steps for file transfer to a patient.

Support: Help Desk at 231-935-6053 or Ambulatory Informatics at 231-392-0229.

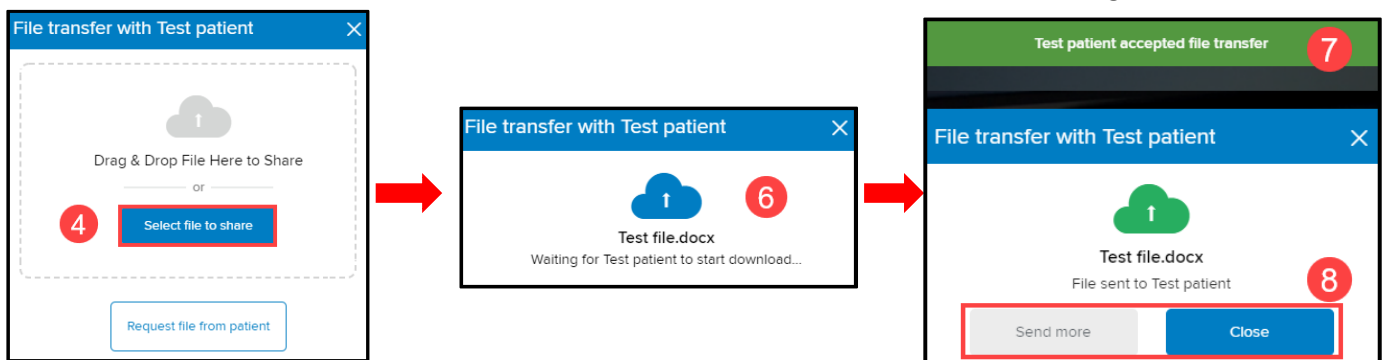
File Transfer to Patients

- File transfer may be used to securely send information to patients. (Examples for use: patient education, PHQ-2 and PHQ-9 questionnaire, etc.)
- Transferring a file to a patient can be done from the Dashboard or from within a patient call.
- The patient must be checked into the virtual waiting room and in the patient queue before proceeding.

- Transferring a file from the dashboard:
 1. Click on next to the patient name.
 2. Click **More**.
 3. Click **File Transfer**.



4. Click **Select file to share**.
5. Select the desired file from your computer.
6. A box will display Waiting for patient to start download.
7. Once the patient selects Download, a notification will appear that the patient accepted the file transfer.
8. Select either **Send more** to transfer another file, or **Close** if done with transferring.



- Transferring a file within a patient call:
 1. Click on **File Transfer** on the menu to the left and follow steps 4-8 above.

